

Guidelines for Writing and Delivering Reports

The following is just a slightly modified version of Professor Karen Kafadar's Guidelines.

An essential element of being a good statistician - or any professional-is the ability to communicate effectively, both orally and in writing. The right solution is useless if it cannot be communicated to the client (and others)!

Oral presentations are useful for generating discussion and feedback, particularly for interim results. Written reports often are required in a business environment to finalize a project and to communicate results and action items. Personally, we both find it easier to prepare our oral presentations from our written reports. Guidelines for preparing both follow.

Guidelines for written report

A. Prepare an outline.

1. Summary or abstract (1 paragraph)
2. Introduction: Objectives and general background (not a book!)
3. Methodology: Approach to problem
4. Results
5. Conclusions, further work, action items, recommendations
6. Bibliography (if necessary)

Note: Abstract, introduction, and conclusions should be able to stand on their own. Some people will read only these sections, so they need to be especially clear.

B. Write the report.

1. Start with your name, position, and project title.
(Sections 1-5 above SHOULD be included.)
2. Use clear, simple English, and avoid long (20-25 words) sentences.
3. To get started with your draft, write as if you are talking to someone directly from your outline.
4. Plan to revise your draft - sometimes several versions are necessary.
5. Be careful not to offend anyone.
6. Leave technical details to an appendix.

C. Revise.

1. To find the right words, consult a thesaurus.
2. Check spelling!
3. Ask someone to read it over, for content, spelling, and (especially) grammar.
4. Consider judicious, not unnecessary, use of special fonts and punctuation.
5. Set aside your draft for 24 hours. Upon re-reading it, ask yourself:
 - Is it clear?
 - Does it read smoothly?
 - Is it unnecessarily wordy or too succinct?
 - Have you confirmed the numerical results?(It is embarrassing when clients and others find mistakes!)

D. (Optional) Check graphs, tables, displays.

1. Color is nice-if it can be reproduced easily.
2. Make clear, self-explanatory title, legends, axis labels.
3. Number sequentially for reference in text (Table 1, Table 2, ..., Figure 1, Figure 2, ...)
4. State all units of measurement.
5. Use only as many significant digits as can be believed.
6. Consult some good sources on visual displays (e.g., Wainer, Tufte).

Guidelines for oral presentations

Please see additional documents off class web page.