

WRITING EFFECTIVE REPORTS

OVERVIEW

- Language and semantics
- Effective report structures
- Psychology and effective writing
- Common usage and grammar challenges

“CHAIR”

- A brown wooden-framed piece of furniture on which to sit
- A blue wooden-framed piece of furniture on which to sit
- A cushy, upholstered piece of furniture on which to sit
- The leader of a meeting of a board of directors
- The act of leading a meeting

“CHAIR”

<ul style="list-style-type: none">▪ Sessel (German)▪ Krzesło (Polish)▪ Karrige (Albanian)▪ Cadeirydd (Welsh)▪ Cathraiche (Scots Gaelic)▪ Židle (Czech)▪ 椅子 (Japanese)	<ul style="list-style-type: none">▪ Diriger (French)▪ Leiða (Icelandic)▪ צו פירן (Yiddish)▪ Alakai (Hawaiian)▪ Juhtima (Estonian)▪ 領導 (Traditional Chinese)▪ ဥံးဆာင်လမ်းပြ ရန် (Myanmar/Burmese)
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ABSTRACTION CONTINUUM

1. Object
2. Inanimate object
3. Possession of Paul's
4. Paul's furniture
5. Paul's living room furniture
6. Paul's comfy chair
7. Paul's green leather armchair

1 = Most abstract; 7 = Most concrete

THE SECRET TO CLARITY: USE THE WHOLE CONTINUUM

- State the HIGH LEVEL IDEA.
- Give an EXAMPLE.
- Come back to the HIGH LEVEL.
- Rinse. Repeat.

KNOW YOUR AUDIENCE

- Each audience is different, fluent in different things, in different degrees
- Profile of audience drives how often you need to go to the concrete ... or not
- Business reading is not recreational
- Consider the degree to which the audience has:
 - Accounting knowledge
 - Appraisal knowledge
 - General expropriation knowledge
 - Math anxiety

DEFINED TERMS

- Use them, but be disciplined
- Example:
 - The Property vs. property
 - The Subject Property
 - The Land vs. land
 - The Subject Lands
 - The Taking
 - The Disturbance
 - The Section 3 Agreement

INTAKE LIMITS

- Brain is part of our physiology
- Efficiency of recall degrades the longer the period of intake
- Studies: Effective time period is 20 to 40 minutes
- Recommendation: Create breaks in reports at those intervals
- Use visual breaks such as graphs, tables, subheadings

REPORT STRUCTURE & FORMAT

USEFUL OVERALL STRUCTURE

Report components:

1. The Question
2. Assumed Facts
3. Analysis
4. Findings

REPORT FORMAT EXAMPLE

- Introductory Section
 - Cover Letter / Executive Summary
 - Table of Contents
 - Table of Technical Terms
 - Table of Report Specific Definitions

REPORT FORMAT EXAMPLE (CONT.)

- Main Section
 - Background/Context
 - Questions Being Asked
 - Assumed Facts
 - Mini-Table of Contents
 - Question 1:
 - Reiteration
 - Response
 - Question 2:
 - Reiteration
 - Response

REPORT FORMAT EXAMPLE (CONT.)

- Summary Conclusion(s)
- Schedules/Appendices
 - Boilerplate detailed descriptions of appraisal/valuation approaches
 - General limitations & qualifications
 - Counsel's instruction letter
 - Information relied upon
 - Page-by-page property details

COMMON MISTAKES

- Focus on the writer, not the reader
- Focus on “ticking boxes”
- Too-long paragraphs/sections
- The myth of the “silver bullet”
- Not enough pictures/graphics
- Repetitive boilerplate
- Late getting to the question(s)
- Grammar, layout, typos
- Passive voice

PSYCHOLOGY AND COMMUNICATION

- Language is a predominantly human activity, and we are usually communicating about fraud to human beings, so ...

- *Cognitive psychology:*

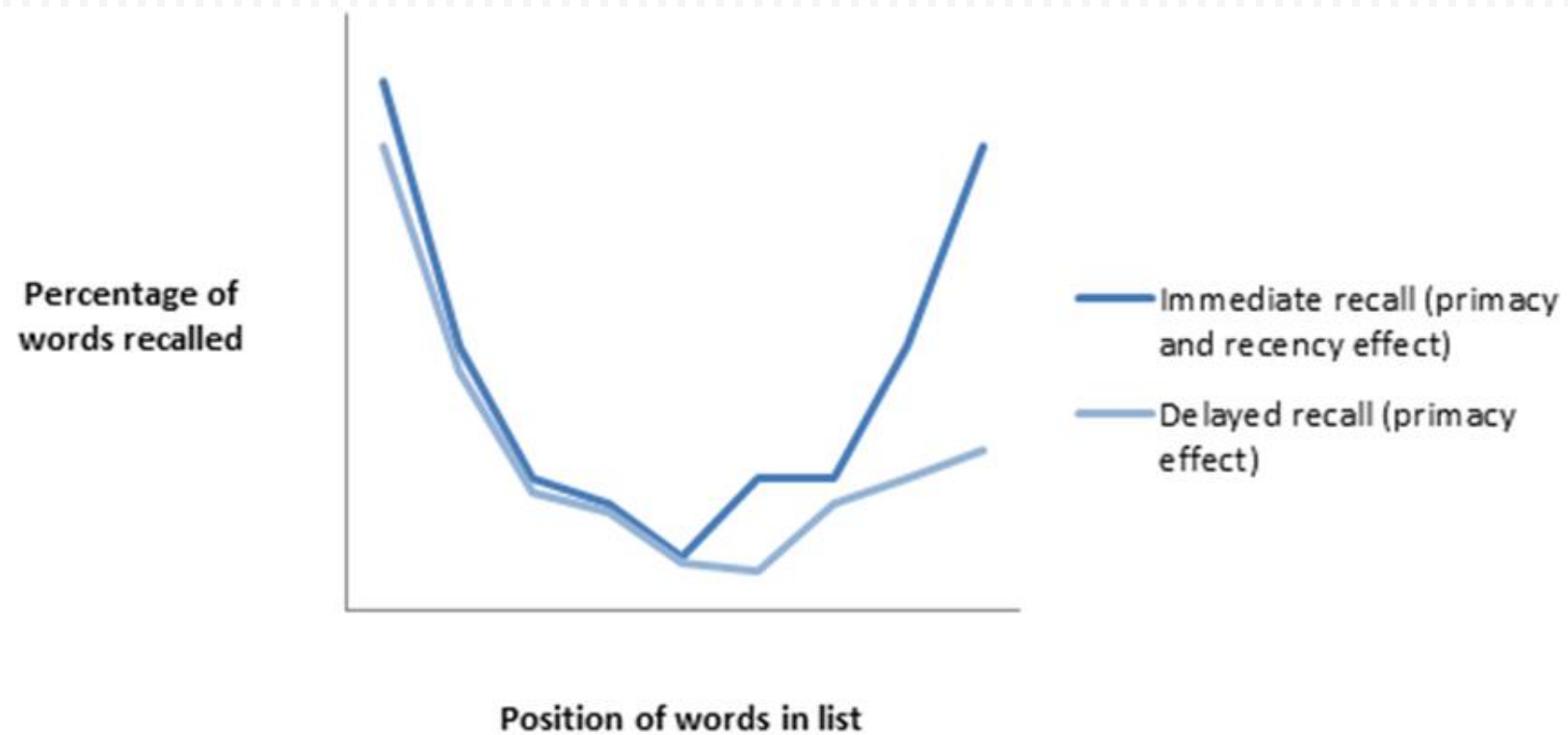
“a branch of psychology concerned with mental processes (as perception, thinking, learning, and memory) ...” (www.merriam-webster.com)

- Our job in reporting should be to make understanding us easy—play to the psychological and communication should improve.

PRIMACY AND RECENCY EFFECTS

- Well-studied and established principle of human memory
 - Basic experimental structure:
 - Present to subject list of words, numbers, symbols in order
 - Wait a short or longer period of time
 - Test subject's ability to recall words
 - The measure of interest is which words were:
 - Most remembered
 - Least remembered
- and
- **What effect did the placement of the word in the list have on recall rate?**

PRIMACY AND RECENCY EFFECTS (CONT.)



glanzer and cunitz (1966) graph

GRAMMAR AND USAGE CHALLENGES

“Righting the Mother Tongue”

GRAMMAR AND USAGE CHALLENGES (CONT.)

- Bullets and parallelism
- Active versus passive voice
- Ambiguous pronoun antecedents
- Filler words
- Its, It's

BULLETS AND PARALLELISM

- Structure of well-used bullets:
 - Lead in paragraph, ending with a colon
 - Bullet paragraphs that are consistent with each other
- “Consistent” means each bullet should be:
 - Things
 - Actions
 - Phrases with the same structure

BULLETS AND PARALLELISM (CONT.)

Good example:

In assessing the lot selling prices over the absorption period, I assumed the following:

- *The lots would be sold as-is, un-serviced.*
- *50% of the lots would be water view and 50% would be forest view.*
- *Prices would escalate by 5% per year starting from 2016.*

BULLETS AND PARALLELISM (CONT.)

Bad example:

In preparing this report, my activities included:

- *Reviewed sales databases to identify comparable properties.*
- *I assumed that the lots would be un-serviced*
- *Preparing the attached schedules*

ACTIVE VERSUS PASSIVE VOICE

- Main objectives in report writing:
 - Clarity
 - Brevity
- Example of active voice:
 - *“Ms. Demeanour purchased the Property in 2015.” (6 words)*
- Example of passive voice where actor is unknown:
 - *“The Property was purchased in 2015.” (5 words – shorter, but who purchased the Property?)*
- Example of passive voice where actor is known:
 - *“The Property was purchased in 2015 by Ms. Demeanour.” (8 words)*

AMBIGUOUS PRONOUN ANTECEDENTS

Some Definitions (www.merriam-webster.com)

- Proper noun: a word or group of words (such as “Noah Webster,” “Kentucky,” or “U.S. Congress”) that is the name of a particular person, place, or thing and that usually begins with a capital letter
- Pronoun: a word (such as I, he, she, you, it, we, or they) that is used instead of a noun or noun phrase
- Antecedent: a word or phrase that is represented by another word (such as a pronoun)

AMBIGUOUS PRONOUN ANTECEDENTS (CONT.)

Consider the following sentence:

“When Ms. Direction was away at lunch, Ms. Demeanour used the opportunity to return the iguana to her purse.”

What happened? To whose purse was the iguana returned?

Problem:

- Antecedent to the pronoun “her” is ambiguous—is the antecedent “Ms. Direction” or “Ms. Demeanour”?

AMBIGUOUS PRONOUN ANTECEDENTS (CONT.)

Suggestions

1. Avoid pronouns.
2. Don't use pronouns if more than one proper noun/person appears in the sentence.
3. If you must use a pronoun, within each sentence, use the proper name first and then the pronoun.
4. Don't start a sentence with "This."

AMBIGUOUS PRONOUN ANTECEDENTS (CONT.)



*“When I nod
my head, you
kick it.”*

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FILLER WORDS

- More words does not make it more authoritative.
- Filler words and phrases and possible replacements:
 - “At this point in time” can become “Currently.”
 - “During the course of” can become “During.”
 - “Regardless of the fact that” can become “Although” or “despite.”
 - “With regard to” can become “Regarding.”
 - “For the production of” can become “To produce.”
 - “In the event that” can become “If.”

REPETITIVE TERMS

Source: “Writing with Clarity” by Robert S. Lee
(Redundant words in *italics*)

- | | |
|-------------------------------------|------------------------------|
| ▪ 8 a.m. <i>in the morning</i> | ▪ first <i>and foremost</i> |
| ▪ <i>actual</i> fact | ▪ green <i>in colour</i> |
| ▪ <i>added</i> bonus | ▪ <i>new</i> innovation |
| ▪ basic essentials | ▪ <i>past</i> history |
| ▪ consensus <i>of opinion</i> | ▪ triangular <i>in shape</i> |
| ▪ at <i>the</i> present <i>time</i> | ▪ <i>true</i> facts |
| ▪ <i>end</i> result | ▪ <i>usual</i> custom |

FILLER EXAMPLE – CATALOGUE REQUEST

Source: “Writing with Clarity” by Robert S. Lee

From a lawyer:

Re: Lee Valley Tools Catalog

With reference to the above mentioned and in answer to your advertisement in Harrowsmith Number 15, would you kindly forward to me forthwith your catalog at the above noted address.

I remain,

Yours very truly,

[signature]

FILLER EXAMPLE – CATALOGUE REQUEST (CONT.)

From a busy doctor:

Catalog, please.

[signature]

ITS, IT'S

- This rule may not be logical, but:
 - “It’s” is a contraction of the words “it is.” For example, “It’s a nice day.”
 - “Its” is the possessive form of “it.” For example, “The cat bit its tail.”
 - “Its’” does not exist in the English language.

And that’s it!

SUMMARY

- Structure your reports logically.
- Get psychology on your side.
- Rid your written reports of distracting incorrect grammar and usage.

QUESTIONS ... ?