Reports and Presentations

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Dr. Michael R. Hyman, NMSU
TAKE A MEMO, MISS FARMSBY.
"TO THE RESEARCH DEPARTMENT.
SOME OF YOUR RECENT REPORTS
HAVE BEEN ENTIRELY
TOO CLEAR."
The Communication Process

1. Communicator
2. Message
3. Medium
4. Audience

With What Effect

5. Feedback
Original communicator
Medium
Message
Original audience
Research Report

Objectives:

• Explain why research done
• State specific research objectives
• Explain how research done
• Present research findings
• Provide conclusions and recommendations
The Writing Process

Organization
- Gather materials and data
- Consider overall format
- Make detailed outline

Writing first draft

Rewriting
- Improve readability
- Correct grammar and spelling
- Evaluate appropriateness
- Evaluate content

Final word processing

Circulating or publishing
Report Format

Prefatory parts
- Title page
- Letter of transmittal
- Letter of authorization
- Table of contents

Summary
- Objectives
- Results
- Conclusions
- Recommendations

Main body
- Introduction
- Methodology
- Results
  - Area 1
  - Area 2
- Limitations
- Conclusions and recommendations
  - Final area

Appended parts
- Data collection forms
- Detailed calculations
- General tables
- Bibliography
Adapting Report Format to a Level of Formality

Diminishing Need for Formality
Sample Letter of Transmittal

SOPPROOF LEATHER PRODUCTS COMPANY, INC.
KENT, OHIO 44240

December 1, 20XX

Mr. Carl M. Wheeler
Vice President for Marketing
Home Office

Subject: Presentation of Report on Study of Small-Volume Customers

Dear Mr. Wheeler:

Here is my report on the study of small-volume customers. This report, the subject of our conference today, was prepared according to your authorization memorandum dated April 21, 20XX.

As we suspected would be the case when we started the study, the report recommends that we take a very careful new look at our present attitude toward serving customers whose volumes are less than $20,000 per year. Some of the experienced salespeople whom we contacted in personal interviews gave us some excellent suggestions about what our new attitude should be.

The returns from our mail survey of small-volume customers were not as high as we wanted them to be. We do believe, though, that the questionnaires returned are representative of the customers involved in the study. The follow-up survey of a sample of customers who did not return the first questionnaire was most reassuring on this point.

As is perhaps typical of a research department, we discovered during this study another problem area which might bear investigation. This area is that of redefining the boundaries of our sales territories. We are now doing some preliminary thinking about this problem. Should we decide research is warranted, we later will make our recommendations to you.

We are grateful to you, Mr. Wheeler, for your cooperation in this important study. Your keeping the president informally up to date on our progress should pave the way toward his accepting the recommendations made in the report.

Sincerely,

Harold M. Johnson

Approved:
December 1, 20XX

Harold M. Johnson
Associate Analyst
Sales Analysis Section

T. T. Landham
Director and Senior Analyst
Sales Analysis Section
Interpreting Findings and Formulating Recommendations

Executive Summary explains:

• Why research was done
• What was found
• What findings mean
• What action management should undertake
Research Report Organization

1. Table of Contents
2. Background and Objectives
3. Executive Summary: 2 to 4 page summary of findings, conclusions, and recommendations
4. Methodology: 2 to 5 page description of how research was conducted
Research Report Organization

5. Findings
   • Detailed presentation of research findings

6. Conclusions and recommendations

7. Appendices
   • Copy of the questionnaire
   • Cross-tabulations
   • Other supporting material
Common reporting style in marketing has following characteristics:

• Minimize use of words
• Feed information to clients in “sound bites”
• Make extensive use of bulleted charts
• Make extensive use of graphics to explain results
• Use present tense verbs and active voice
Caveats about Marketing Research Reports

• Length does not mean quality
• Insufficient explanation
• Failure to relate to objectives
• Indiscriminate use of quantitative methods
• False accuracy
• Fallacy of single-number research
• Inaccurate data interpretation
Problems with Spell Checkers

"I have a spelling checker
It came with my PC;
It plainly marks four my revue
Mistakes I cannot sea.
I've run this poem threw it,
I'm sure your pleased too no,
Its letter perfect in it's weigh,
My checker tolled me sew."

-Janet Minor
Making a Personal Presentation

• What do the data really mean?
• What impact do they have?
• What have we learned from the data?
• What do we need to do, given the information we now have?
• How can future studies of this nature be enhanced?
• What can make information such as this more useful?
Materials for a Personal Presentation

• Presentation outline
• Visuals
  • Slide or overhead projector
  • Laptop computer
  • Presentation software
• Executive summary
• Copies of the final report