Writing Business Reports and Executive Summaries

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Overview

1. Getting Started
2. Tips for Improving the Report
3. Executive Summary
4. Practice and Discussion
What is the purpose of your report?

• Are you asking for something?

• Is it a summary of activities?

• Why would your reader have an interest in this information?
Write What You Know

• You’re displaying your knowledge of the subject, facts and conclusions gathered

• Break it down into sections: information gathering (methods, etc.), summary of information (full data in appendices), conclusions, action items/recommendations

• Do not forget to include the considerations that you took while making decisions
Writing Sample

Due to the high cost and data issues, the library is cancelling our subscription to XYZ, which represents a savings of $12,000 that will be used for other databases.

Patron complaints about XYZ have been rising (see Appendix 2, Patron Complaints Log). Data is between 4-7 years out of date and the vendor blamed this on a third party information source; they will not be updating the information.

We will direct patrons to 123, with which we have a pre-existing subscription. 123 now has the same datasets and is updated monthly.
Audience

• What are the key ideas from the report?
• Knowledge and bias
• Avoid jargon and watch use of technical language
• If you have multiple stakeholders, adjust accordingly
• How will readers be using this information?
Style

• Does your workplace have a template for this type of report?

• Are there style specifications defined by the audience?

• Internal vs. public documents
were borrowed and there were 26 million virtual visits to the library’s website.

To develop the plan, the library undertook extensive research, including an environmental scan which analyzed demographic, economic, political, and social trends in Toronto and across Canada. An internal scan considered current services, usage trends, and best practices in libraries and other organizations.

The environmental scan also identified key strategies of the City of Toronto, the Province of Ontario, and other service providers to determine how the library can align with these organizations and work in partnership to achieve common goals.

As a result of this process, staff developed draft priority areas and goals which were used as a framework for community consultation to understand residents’ needs and priorities for library service, both now and in the future. The library’s vision, mission, and service values were also reviewed.

Input was sought from community partners, agencies, school boards, and other education partners, from the mayor and city councillors, and from City and library staff. In 2012, more than 2,000 residents participated in the consultation process, which included in-branch and online surveys, 49 consultation sessions, 15 blog posts, and four Twitter chats. In addition, Toronto Public Library engaged a third-party market research firm, The Strategic Counsel, to conduct a survey of Torontonians to understand their awareness and usage of and priorities for library service. See Appendix B for more details about the consultation process.

The Toronto Public Library Board recognized the importance of building on the achievements of the library’s Strategic Plan 2008-2011 and identified strategic areas for continued focus in the new plan. These areas include focused service development for children (6-12 years), enhanced services for older adults and seniors, continued expansion of self-service features online and in branches, and the integration of new technologies into library service delivery.

The draft priority areas and goals were then refined, incorporating the results of consultation. The Strategic Plan 2012-2015 was approved by the Board at its meeting on November 29, 2012.

The plan outlines four priority areas and 15 goals for service development and partnership development to leverage resources and improve services. Key partners include the City of Toronto, community and cultural agencies, the education sector, and the Toronto Public Library Foundation. To ensure accountability, annual work plans and reports with achievements related to the strategic plan are reported to the Library Board annually and are made available on the library’s website.

Approval, Measurement and Accountability

Key performance indicators and annual reports are developed and tracked each year and new measures will be introduced through this new plan.

Key Performance Indicators include:

- Activity (use) per capita
- Cost per capita
- Cost per use
- Library users as a percentage of the population
- Percentage of residents reporting high satisfaction with library services

Who uses the Library:

- 72% of Torontonians used the Library in 2012
- One in six visited at least once a week.
Tone

Watch for judgemental language
i.e. This could have been better if we had more funding.
Vs.
Additional funding would enable the project to expand beyond its current capacity.
Adding Data

- Is the data relevant or is it just there to add visual?
- Are the sources clear?
- What additional questions could this cause your audience to ask?
- Include a full count of findings (in Appendix), not just references in the report
Proofread, Proofread, Proofread

• Is it too wordy?

• Can you tell who the audience is?

• Too much jargon?

• Is it clear that various options were examined?
Executive Summary

Brief Introduction
Short Overview
Results
Conclusions/Action Items
Brief Closing
Writing Your Executive Summary

• 1 page is preferred; bullet points are fine

• The emphasis needs to be on conclusions and recommendations

• Don’t get bogged down in other details
What to Avoid in Executive Summaries

• Repetition

• Too much background information

• Make sure highlights match key highlights in document
Sample: Knowledge Management System

Introduction

Priorities:
- Capture knowledge & practices from individuals within two years of retirement
- Training sessions for all staff to incorporate knowledge retention practices

Results:
- 45% of near-retirement staff have completed their required documentation for the system
- 80% of staff have finished training and 32% are updating system regularly

Action Items:
- Management needs to make knowledge retention practices a priority for those who are planning retirements - giving appropriate work time to complete information
- HR will include KM requirements in the pre-retirement packages
- Regular users of KM system will be called on to promote the system with their colleagues. Targeted departments for immediate action are IT and Marketing
Results

• 45% of near-retirement staff have completed their required documentation for the system

• 80% of staff have finished training and 32% are updating system regularly
Action Items

• Management needs to make knowledge retention practices a priority for those who are planning retirements - giving appropriate work time to complete information

• HR will include KM requirements in the pre-retirement packages

• Regular users of KM system will be called on to promote the system with their colleagues. Targeted departments for immediate action are IT and Marketing
Recommendations

- Action items - who are they for?
- Multiple options or limited? Is an explanation included?
- Use strong language and avoid passive tense
  Weak: “In my opinion, adding additional German language materials should allow us to increase our circulation targets at this branch.”
- Give specific targets for action items
Examples for Discussion

“Improve record retention practices by performing standards check in March and September.”

“Increase sales by 10% with release of new product line.”
Executive Summary Review

- What do you learn about the report and conclusions?
- What are the action items?
- Any issues with the summary?
Group Work

Write an executive summary based on the report excerpts provided.

Brief Introduction
Short Overview
Results
Conclusions/Action Items
Brief Closing
Reminders

• Keep your audience in mind

• Show off your knowledge (but don’t be too wordy or technical about it)

• Have someone proofread your work

• Emphasis on conclusions and action items
Questions?

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PowerPoint will be available on iSchool Workshop website.
Resources