



Preparing project documentation

Introduction to preparing analytical reports

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Ann Iren Glimsdal
Senior Consultant, Norsk Energi
ann.glimsdal@energi.no
www.energi.no

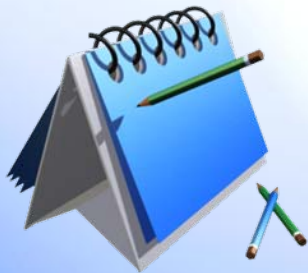




Analytical reports

To advice those who are responsible for taking decisions on the measures to be taken; analytical reports often serve as a point of departure for planning a project

Our analysis most likely would argue for something. Therefore it is not enough to write 'we should this or that'. A reader is not going to unthinkingly accept an advice. An author has to convey his argument that is desirable to adopt the measures proposed.





What Requirements Must Analytical Report Fulfill?

Structure

Information shall be **well grouped** (e.g., all relevant problems handled in a separate section). Text shall be **logically ordered**, i.e., text must have clear progression, step-by step presentation.

Formulation

The formulations shall be **understandable**, first time they are read. Text shall be **acceptable**, e.g., presented in business like style. Language shall be **correct**, e.g., free from misprints.

Presentation

Make it possible for a reader to skip part of the text which are not interesting to read. **Rough reading** focuses at: table of content, section headings, introduction, beginning of long sections

What is an effective report?



- It shall be written with the target reader in mind
 - Who is reading the report and why?
 - What is the reader most interested in?
- The content must be clear, concise, relevant and accurate!
- The report must appear well thought out and professional
 - Clear scope of project
 - Consistency
- The language used should be neutral and not emotive



Who is the reader?

- Very often someone with a different professional background than the writer
- What role in the project is the reader foreseen?
- What is of interest of the reader?
- What is the motivation for the reader to spend time on your report?
 - Do you have many competitors?
- What would be the selling argument?



What is the reader interested in?

Example

Owner wants

- Reduced energy costs
- Increased productivity
- Company policies and directions
- Spinn-off effects that are important for market positioning
 - CSR
 - Green image
 - Being market leaders

Equity investor wants

- Acceptable return on acceptable risk
- Predictability
- Transparent and socially acceptable project
- Commercial risk where possible
- Secure the down side
- Look for the upside

Bankers wants

- Their money back
 - On time
 - With interest
- No worries and surprises
- Security

What type of documentation?

- Identify requirements at an early stage
 - Company procedures & requirements
 - Receivers requirements
 - Use dedicated templates if available

Pre-
feasibility
study

Grant
appli-
cation

Target the business plan (BP)

BP

To decision
makers in
company

BP

To equity
investor

BP

To lender

For CDM projects

PIN

Project
Identification
Note

PDD

Project design
document



Argue

- Why should this project be implemented/granted/financed?
- If seeking partner - what makes you a credible partner?
 - Experience
 - Solidity

Structure

Important considerations

- ❑ Readers expect certain information in certain places – they do not expect to have to hunt for what they want (well structured) .
- ❑ The harder you make information to find, the more likely they will put the report aside and ignore it!
- ❑ Tips:
 - Follow the generally accepted formats
 - Organise the information in each section in a logical order; usually putting most important things first!





Structure outline

1. Heading page
2. Contents list
3. Executive summary
4. Background /
Introduction
5. Working Method
6. Findings
7. Analysis
8. Conclusions
9. Recommendations
10. Appendices



Heading Page

- Leave this page until last
- First impressions count when receiving a report, so think about the impression you wish to make

Contents Page

- Often used with rough reading
- This will also be one of the last pages to be done in the report
- The use of 'referencing' in your word document will make this page easy to compile



Executive Summary

- The final section of the report you will write!
- Provides a concise summary of the main points in your report, including conclusions and recommendations
- Must be professional in style and content – This is the one section of the report **EVERYONE** will read and decide if they should read the report
- No new information should be included in this section – **ONLY** information which is already contained in the report.



Background / Introduction

- ❑ Should outline WHY this report has been written
- ❑ This section should set analysis of baseline situation for the reader
 - What is the problem(s)?
 - Why is this a problem(s), or where does it lead to?
 - What is the cause of the problem?
- ❑ Formulation of the central question
 - Formulation of the most important questions answered by the text
 - Thus, a reader may immediately ascertain whether a text of any significance of him
- ❑ Structure of the paper
- ❑ Should outline any problems which were identified and the effect they've had on the report



Working Method

- ❑ This is the section of the report where you must explain HOW the input information for the assessment has been gathered
- ❑ What were the sources of information
- ❑ What was the method of the investigations and analysis
- ❑ How was quality assurance done
- ❑ Was there any special documents or templates used for gathering of data



Findings

- ❑ This section should outline information or facts identified.
- ❑ Depending on the type of results, these could be in tables.
- ❑ If the results are quite short, they can be presented in the body of the report, however if there are lots of results, these would be better placed in an appendix.



Analysis

- Providing factual results is often not enough
- Your views, opinions and discussion shall be presented
- Desired situation to be outlined
 - What is the aim
 - What are the preconditions
- Describing potential measures and options (findings)
- Assessment of possible measures
 - What are advantages
 - What are disadvantages
- All findings, observations are fact based and therefore shall be substantiated



Conclusions / Recommendations

- ❑ Put ahead if possible
- ❑ This section allows you to make conclusions based on the findings
- ❑ These recommendations should be based on findings and results you outlined **in the report**
 - What is the best measure
 - Why is this the best measure?
- ❑ Indicate **who** must do and **what** and in what period of time
- ❑ Your chance to SELL your ideas and recommendations to the reader



Appendix

- Appendices allow you to add supporting information about your report. These could be spreadsheets, forms, questionnaires, tables, charts, articles, or anything else which would support your report
- By adding additional information in the appendix, this allows the report to **flow**, without interruption from excessive amounts of information
- Ensure you make reference to the information in the appendix, otherwise this information does not appear to be of relevance to the reader!!



Construction of paragraphs

To make it easier to absorb information, lay down 1 sentence, as the main point or introduction to what the major points of the paragraphs are

- Topical sentence – proposes key message of the paragraph
- Introductory sentence – announces main topic of the paragraph



Make Connections in Your Text

Paragraphs are complete information blocks. To be able to read complete text, the reader shall be able to understand connections.

- ❑ Summation connections – when paragraphs are listing series of e.g., problems:
 - firstly, secondly....
 - In first place
 - To begin with, subsequently, a), b),c)
- ❑ Contrasting connections – when text may comprise a contrast comparison
 - on the other hand
 - however, but, nevertheless
- ❑ Causal connections – information indicates a cause or effects
 - as a result of
 - therefore, caused by, this leads to, as a consequence of
- ❑ Illustrative connections – an information from 1 paragraph serve as an illustration
 - in other words, that means that
 - to illustrate, an example of this is
- ❑ Summarizing connections – when paragraph summarize information above
 - because, therefore, after all
 - it can be concluded that



Other tip

Chapter titles

- Relevant
- Short

Visualize

- Schematic figures
- Graphs
- Photos from the area
- Maps
- etc



Thank you for your attention!