



BEST PRACTICE Written Reports

While QA analysts write many types of documents, reports to management are the focus of this section because written reports are often used to judge the QA analyst's ability to write.

Good ideas are of little value unless they are accepted and implemented. The QA report is designed to convey information and to change behavior. QA analysts write a report, distribute it, and follow up on the recommendations. The value of the quality function can be rated on whether management accepts the report. Thus, the report must be comprehensive, identifying the scope, explaining the factual findings, and suggesting recommendations. The report must be written clearly and effectively enough to cause action to be taken, and must include all information necessary to attain that end.

To write a good report the QA analyst should perform these ten tasks:

1. Establish report objectives and desired management actions

Writing a successful report requires a clear understanding of both the report objectives (what the QA analyst hopes the report will accomplish) and the desired action (what the QA analyst wants management to do after reading the report).

2. Gather factual data (i.e., findings) and recommendations

Ensure that relevant evidence supporting the data and recommendations is incorporated into the report. Failure to include this will adversely affect the credibility of the quality function and management will almost certainly disagree with the factual information in the report.

3. Develop a report outline

A good report has no more than three objectives and three actions. Too much data or too many requests overwhelm the reader. If several items need reporting to management, rank the objectives according to priority, and report only the three most important. List small items in an appendix or a supplemental letter.

4. Draft the report



General principles of writing any report apply to a QA report. Consider using the presentation tools discussed in Skill Category 4. The QA analyst should also remember the following potential problem areas:

- Keep the quality-oriented language at a level that can be understood by management, and explain any technical jargon of quality.
- Provide enough information to make implementing the recommendations possible.
- Ensure there is adequate time to write the report.

5. Review the draft for reasonableness

The author should review the report to verify that the data gathered adequately supports the findings and recommendations, and that the information is presented clearly.

6. Have the report reviewed for readability

At least one person other than the author should look at the report objectively, from the perspective of the target audience, to assess the impression the report will make on its readers, and the impact it will have in changing managerial behavior. Appearance, wording, and effectiveness of the report are evaluated by considering the following questions:

- Does the report appear to have been developed by a professional and knowledgeable group?
- Do I understand what the report is trying to tell me?
- Would a person associated with the report topic find the information in the report offensive or disparaging? If so, would they be more concerned with developing countermeasures than with implementing the recommendations?
- Does the report adequately build a case for implementing the recommendations?
- Does the report clearly differentiate between important and less critical items?

7. Review the report with involved parties



To recognize the importance of findings and recommendations, they should be discussed with affected parties before issuing the final report so that their support can be solicited.

8. Review the report with management

When the report is complete, the QA analyst should meet with management to explain the report and to obtain their concurrence. Any issues should be addressed and corrected.

9. Finalize the report

After incorporating any review comments make any final edits to the report.

10. Distribute the report and follow up

Distribute the final report to the appropriate parties, and follow up to ensure that appropriate action is taken.

References

Guide – CSQA Common Body Of Knowledge, V6.2