

Authors and Contact Information

Jacqueline Chan
Managing Partner
Jacqueline@NaviusResearch.com

Suzanne Goldberg
Partner
Suzanne@NaviusResearch.com

Navius Research Inc.
Vancouver / Toronto
520-580 Hornby Street
Vancouver, BC V6C 3B6
604-683-1452
www.NaviusResearch.com

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Is Your Target Audience Hearing You?

Six Best Practices for Creating Effective and Engaging Reports

Are your reports achieving your desired outcomes?

Reports are a critical tool for sharing your organization's successes, demonstrating program value, disseminating knowledge, soliciting feedback, and engaging stakeholders. However, the costs associated with ineffective reports are high: lost time, production expenses, and most importantly, missed opportunities. Navius reviewed hundreds of reports and identified six best practices that make the most effective reports stand out from the rest.

- Identify the target audience's needs, drawing on research tools such as surveys, website analytics, literature reviews and media analyses if necessary.
- Match the report's information content, organization, and level of detail to the target audience's interests and needs
- Match the writing style to the target audience's knowledge level
- Identify secondary audiences, determine their needs, and direct them to other sources that may better meet their needs

Effective Reporting



Navius undertook this research as part of a project for a federal government department that wanted to re-design their annual report to better communicate their work, be more useful to their stakeholders, and reduce production costs and turnaround time. The following best practices assume that an organization has already taken the first essential step in the report development process: creating a communications strategy that identifies the specific outcomes the report is intended to achieve, the target audience that must be reached to achieve these outcomes, and the key messages that the target audience must take away from the report to compel them to take the desired action.

1. Customize the report for the target audience

Reports that attempt to meet the needs of all potential audiences can't effectively meet the needs of their target audience.

2. Tell a clear story

Tie the report's information together with a clear storyline, using organization and design to guide readers through the story in a logical and intuitive way.

- Start the report with a high-level summary of the story to give readers context and help them follow and interpret the content in the body of the report
- Tell readers why they should read the report and how it relates to them, how the report is structured, and where they can find the information they are looking for
- Structure the report so that different sections or chapters flow together to provide a logical path through the information
- Explicitly state how each section contributes to the overall story and relates to the previous and following sections
- Use section summaries, key facts, and graphics to provide a quick overview at the beginning of each section
- Organize and report information according to how the target audience frames an issue, rather than sector or topic experts
- Use sub-titles to visually guide readers through the story
- Break up large sections of text with pictures, graphics or design elements (such as pull quotes or text boxes) to enhance readability

3. Highlight key messages

Effectively communicate key messages by tying them to the target audience's interests and using design elements to emphasize them.

- Ensure that the key messages and storyline are consistent and reinforce each other
- Show how key messages relate to the target audience's interests
- Keep key messages clear and simple, and communicate them using metrics that are meaningful and useful to the target audience
- Use infographics¹, figures, tables, pull quotes, text boxes, font size, and colour to emphasize key messages. Surrounding text should support the key message.
 - It is usually easier for readers to assimilate visual information rather than blocks of text
 - Tables and figures force report writers to concisely communicate key information, and provide a visual structure that helps readers interpret the content.

4. Layer information

Connect with multiple audiences that have different information needs, subject familiarity, and format preferences by progressively layering detail into the report.

- Design front-end materials to meet the needs of the broadest audience by focusing on key messages, rather than context and background
- Make the highest-level material quick and easy to review by using headlines, large font, bullet points, and infographics, rather than paragraphs of text
- Drill down to more detailed report components that provide necessary context and support the key messages
- Put content that is essential to include, but is used by a smaller audience at the end of the report (e.g., more extensive background information, definitions, statistics)
- Don't duplicate data that is published elsewhere if it is not essential to the story or the audience – instead incorporate it by reference

5. Personalize and illustrate the story

Use success stories, examples, quotes, and case studies to reinforce key messages and engage target audiences.

- Select illustrative content that will be meaningful and relevant to the target audience
- Demonstrate and emphasize key results and successes with examples and stories
- Incorporate quotes from partners, stakeholders, and experts to support results, reinforce key messages, and provide personal and local touches
- Include photographs with success stories or quotes to enhance the sense of personal or local connection
- Make achievements meaningful to the target audience by expressing them in familiar terms, and putting abstract results in context by comparing them to something in the audience's frame of reference
- Use language and tone that is respectful but engaging, including humour where appropriate

6. Take advantage of online capabilities

Add value (and shift users from print to online) by making digital reports easy to read and navigate, and providing additional features and information.

- Provide a clear and visual navigation menu to help readers browse through the report's content, rather than just downloading the complete report as a PDF file
- Include an interactive guide for readers with direct links to the information they need
- Use hyperlinks to support information layering and keep the report up to date:
 - Links to other related or relevant sections of the report
 - Links to supporting information, additional detail, or more recent data
- Make PDF documents easier to read by using tools that display them like books, such as Flash flip books
- Engage readers by including links on each page to provide feedback or share the information via email or social media
- Make it easy for readers to save the information they need and minimize paper use:
 - Include links to save or print each page or section
 - Provide downloadable supporting information (such as Excel spreadsheets with key data sets)
 - Give readers the option to build a PDF that only includes the sections they need

¹ Infographics present extensive or complex data or information in a visual way to highlight key findings, results, or outcomes for readers.

Navius' communications team would be happy to provide a complimentary assessment of an existing report, or the planned approach for a forthcoming report. For more information, please contact Jacqueline Chan at 647-893-8910 or Jacqueline@NaviusResearch.com.