

Tippie College of Business

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# Adv. Managerial Accounting Writing Assignment 2 Tutorial

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**Writing and Communications Program Director**

# Purpose of assignment

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Increase ability to find order out of chaos

- Data analysis
- Critical thinking
- Clear presentation of findings

Provide a supervisor with high-level information

Engage with data visualization best practices

# Report Elements

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Non-tax memo – no specific sections except for Executive Summary and Conclusion

## Important elements

Executive Summary w/ overall finding/recommendation

Stand Alone Sense (SAS) headers that identify a broad position (4-7 words)

- **Ineffective:** Throughput Costing
- **Effective:** The Benefits of Throughput Costing

Claim/positioning statements (not description) to begin sections

Concluding comments

- Necessary additional information, implications, next steps

# Executive Summary

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Provide context (why are you writing this document?)

Use direct language – can include some 1<sup>st</sup> person “I” language

- **Awkward passive opening (ineffective):** “this document serves to inform management about findings determined through analysis”
- **Direct language (effective):** “In this document, I will identify key findings from my analysis”

Include most important overall findings

- Likely to be a bit messy – the findings may be unrelated to each other, and that’s fine

# Example of body section structure

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**SAS header:** Small Increase in Cash Budget for Next FY

**Section claim:** The company's cash position will improve slightly (+2.8%) from the beginning of the year.

**Further analysis:** Remainder of paragraph discusses the causes of this increase and what it means moving forward

- Will the rate of increase likely continue, grow more, or stop?

# Making effective visuals

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Integrate at least two visuals in (not after) appropriate sections of the text

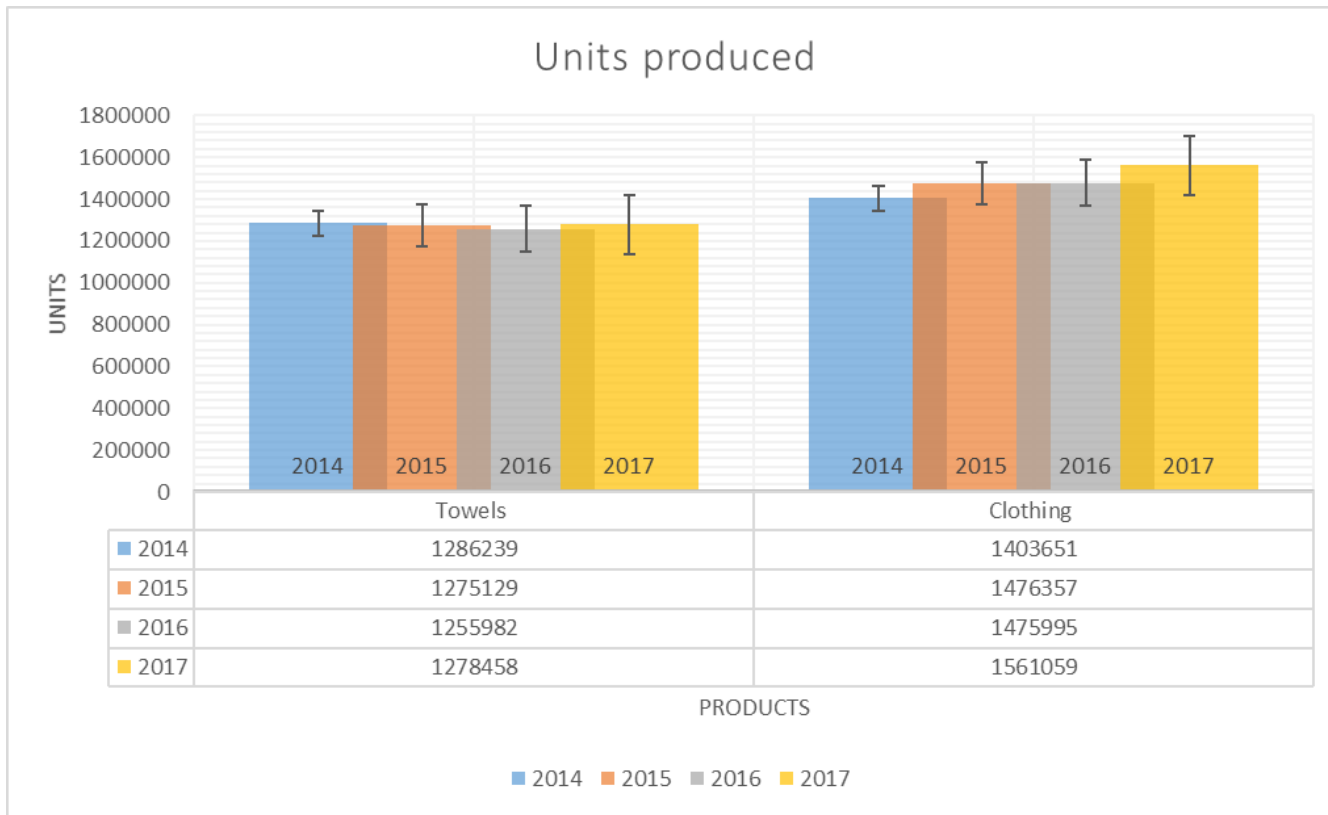
Include a message title that establishes the visual's takeaway message

- **Ineffective:** Profits
- **Effective:** Net income down 13% in 2020 Q4

Eliminate unnecessary elements/chartjunk (see next slide)

- Don't simply accept what Excel spits out

# (Likely) Unnecessary elements\*



Zeros on y-axis

Table below graph

Error bars

Years x3

Grid marks

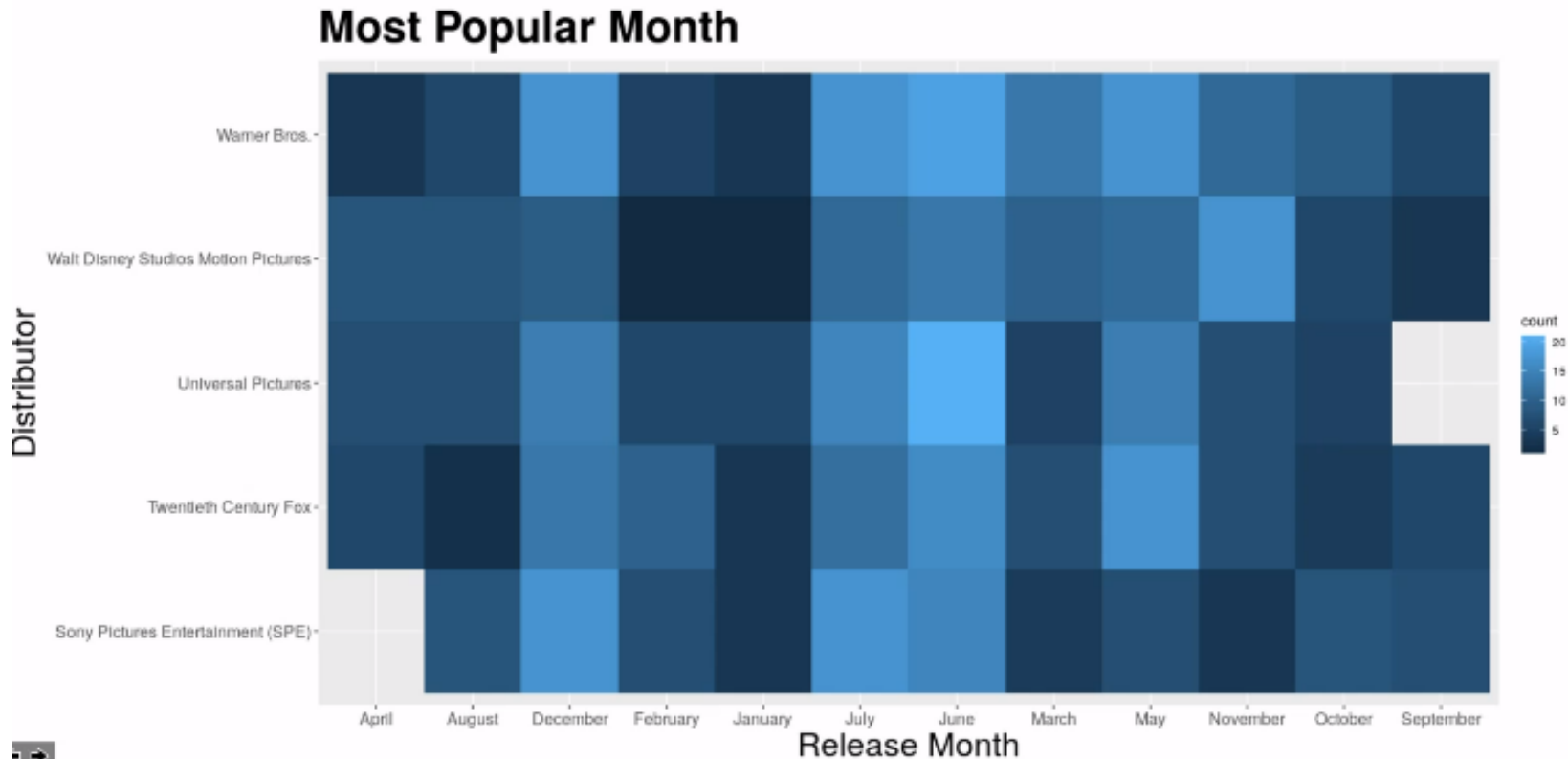
\*For now, practice getting rid of anything not essential, but in reality, it depends on audience expectations

# Optimized graph w/ same data set





# Consider how information is organized



**IOWA**