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Contributors:Courtney Perkins, Allen Brizee.

Summary:

This handout will help you solve your memo-writing problems by discussing what a memo is, describing the parts of memos, and providing examples and explanations that will make your memos more effective.

Audience and Purpose

Memos have a twofold purpose: they bring attention to problems and they solve problems. They accomplish their goals by informing the reader about new information like policy changes, price increases, or by persuading the reader to take an action, such as attend a meeting, or change a current production procedure. Regardless of the specific goal, memos are most effective when they connect the purpose of the writer with the interests and needs of the reader.

Choose the audience of the memo wisely. Ensure that all of the people that the memo is addressed to need to read the memo. If it is an issue involving only one person, do not send the memo to the entire office. Also, be certain that material is not too sensitive to put in a memo; sometimes the best forms of communication are face-to-face interaction or a phone call. Memos are most effectively used when sent to a small to moderate number of people to communicate company or job objectives.

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Parts of a Memo

Standard memos are divided into segments to organize the information and to help achieve the writer's purpose.

Heading Segment

The heading segment follows this general format:

TO: (readers' names and job titles)

FROM: (your name and job title)

DATE: (complete and current date)

SUBJECT: (what the memo is about, highlighted in some way)

Make sure you address the reader by his or her correct name and job title. You might call the company president "Maxi" on the golf course or in an informal note, but "Rita Maxwell, President" would be more appropriate for a formal memo. Be specific and concise in your subject line. For example, "Clothes" as a subject line could mean anything from a dress code update to a production issue. Instead use something like, "Fall Clothes Line Promotion."

Opening Segment

The purpose of a memo is usually found in the opening paragraph and includes: the purpose of the memo, the context and problem, and the specific assignment or task. Before indulging the reader with details and the context, give the reader a brief overview of what the memo will be about. Choosing how specific your introduction will be depends on your memo plan style. The more direct the memo plan, the more explicit the introduction should be. Including the purpose of the memo will help clarify the reason the audience should read this document. The introduction should be brief, and should be approximately the length of a short paragraph.

Context

The context is the event, circumstance, or background of the problem you are solving. You may use a paragraph or a few sentences to establish the background and state the problem. Oftentimes it is sufficient to use the opening of a sentence to completely explain the context, such as,

"Through market research and analysis..."

Include only what your reader needs, but be sure it is clear.

Task Segment

One essential portion of a memo is the task statement where you should describe what you are doing to help solve the problem. If the action was requested, your task may be indicated by a sentence opening like,

"You asked that I look at..."

If you want to explain your intentions, you might say,

"To determine the best method of promoting the new fall line, I will...."

Include only as much information as is needed by the decision-makers in the context, but be convincing that a real problem exists. Do not ramble on with insignificant details. If you are having trouble putting the task into words, consider whether you have clarified the situation. You may need to do more planning before you're ready to write your memo. Make sure your purpose-statement forecast divides your subject into the most important topics that the decision-maker needs.

Summary Segment

If your memo is longer than a page, you may want to include a separate summary

segment. However, this section not necessary for short memos and should not take up a significant amount of space. This segment provides a brief statement of the key recommendations you have reached. These will help your reader understand the key points of the memo immediately. This segment may also include references to methods and sources you have used in your research.

Discussion Segments

The discussion segments are the longest portions of the memo, and are the parts in which you include all the details that support your ideas. Begin with the information that is most important. This may mean that you will start with key findings or recommendations. Start with your most general information and move to your specific or supporting facts. (Be sure to use the same format when including details: strongest to weakest.) The discussion segments include the supporting ideas, facts, and research that back up your argument in the memo. Include strong points and evidence to persuade the reader to follow your recommended actions. If this section is inadequate, the memo will not be as effective as it could be.

Closing Segment

After the reader has absorbed all of your information, you want to close with a courteous ending that states what action you want your reader to take. Make sure you consider how the reader will benefit from the desired actions and how you can make those actions easier. For example, you might say,

"I will be glad to discuss this recommendation with you during our Tuesday trip to the spa and follow through on any decisions you make."

Necessary Attachments

Make sure you document your findings or provide detailed information whenever necessary. You can do this by attaching lists, graphs, tables, etc. at the end of your memo. Be sure to refer to your attachments in your memo and add a notation about what is attached below your closing, like this:

Attached: Focus Group Results, January- May 2007

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Format

The format of a memo follows the general guidelines of business writing. A memo is usually a page or two long, should be single spaced and left justified. Instead of using indentations to show new paragraphs, skip a line between sentences. Business materials should be concise and easy to read. Therefore it is beneficial to use headings and lists to help the reader pinpoint certain information.

You can help your reader understand your memo better by using headings for the

summary and the discussion segments that follow it. Write headings that are short but that clarify the content of the segment. For example, instead of using "Summary" for your heading, try "New Advertising Recommendations," which is much more specific. The major headings you choose are the ones that should be incorporated in your purpose-statement in the opening paragraph.

For easy reading, put important points or details into lists rather than paragraphs when possible. This will draw the readers' attention to the section and help the audience remember the information better. Using lists will help you be concise when writing a memo.

The segments of the memo should be allocated in the following manner:

- Header: 1/8 of the memo
- Opening, Context and Task: 1/4 of the memo
- Summary, Discussion Segment: 1/2 of the memo
- Closing Segment, Necessary Attachments: 1/8 of the memo

This is a suggested distribution of the material to make writing memos easier. Not all memos will be the same and the structure can change as you see necessary. Different organizations may have different formatting procedures, so be flexible in adapting your writing skills.

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Sample Memo

TO: Kelly Anderson, Marketing Executive

FROM: Jonathon Fitzgerald, Market Research Assistant

DATE: June 14, 2007

SUBJECT: Fall Clothes Line Promotion

Market research and analysis show that the proposed advertising media for the new fall lines need to be reprioritized and changed. Findings from focus groups and surveys have made it apparent that we need to update our advertising efforts to align them with the styles and trends of young adults today. No longer are young adults interested in sitcoms as they watch reality television shows. Also, it has become increasingly important to use the internet as a tool to communicate with our target audience to show our dominance in the clothing industry.

Internet Advertising

XYZ Company needs to focus advertising on internet sites that appeal to young people. According to surveys, 72% of our target market uses the internet for five hours or more per week. The following list shows in order of popularity the most frequented sites:

- Google
- Facebook
- Myspace
- EBay
- iTunes

Shifting our efforts from our other media sources such as radio and magazine to these popular internet sites will more effectively promote our product sales. Young adults are spending more and more time on the internet downloading music, communicating and researching for homework and less and less time reading paper magazines and listening to the radio. As the trend for cultural icons to go digital, so must our marketing plans.

Television Advertising

It used to be common to advertise for our products on shows like *Friends* and *Seinfeld* for our target audience, but even the face of television is changing. Young adults are tuning into reality television shows for their entertainment. Results from the focus group show that our target audience is most interested in shows like *American Idol*, *The Apprentice*, and *America's Next Top Model*. The only non-reality television show to be ranked in the top ten most commonly watched shows by males and females 18-25 is *Desperate Housewives*. At Blue Incorporated, we need to focus our advertising budget on reality television shows and reduce the amount of advertising spent on other programs.

By refocusing our advertising efforts of our new line of clothing we will be able to maximize the exposure of our product to our target market and therefore increase our sales. Tapping into the trends of young adults will help us gain market share and sales through effective advertising.

Attachments: Focus Group Results, January- May 2007; Survey Findings, January - April 2007

This is a sample memo; facts and statistics used are fictional.
