



# Professional Basic English Lecture 7

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# Writing memos and progress reports

- Memos (memorandums) are common in many workplaces
  - Less formal than scientific paper or technical report
  - Informal proposal of a new idea to a supervisor or manager
  - Quick way to brief colleagues or supervisors about the status of a project
- Progress report as a special kind of memo
  - Summarizes recent and future work on a specific project
  - Let the audience know if the work is going on smoothly
  - Point out possible problems and let audience know if you can keep the plan
  - Could also explain if you can finish the project on time and within budget
  - Format can vary (some organizations have templates)



# Tone of memos and progress reports

- Tone should be respectful and professional
  - Purpose to convey essential information efficiently
  - Should be formal even if you know the audience well: no need for writing greetings or closings or any personal comments or wishes
- Conveying negative news in a memo
  - For example, project lags behind schedule or exceeds budget
  - Remain honest: do not express false cheerfulness or optimism
  - You can use expressions like *“unfortunately”* or *“I regret to tell that...”*

Source: <https://www.nature.com/scitable/ebooks/english-communication-for-scientists-14053993/118520487>



# Structure and content

- Some organizations have a template or a set of formats for memos
  - In this case, you must follow the format
- Basic structure can be similar to e-mail
  - It is not always necessary to include a memo in a separate attachment
  - If you mention colleagues, send them a copy and list their names next to “cc:”
  - Can include headings, subheadings and bullet points to highlight information
- Body of the report with status, problems, expected progress
  - Start with the status: what tasks have you finished
  - Describe any problems that have arisen during the problem
  - Summarize with status, good news, key problems, expected completion



# Heading segment

- Typically consists of 1) recipients' names and possibly titles, 2) sender's name and job title, 3) date, and 4) subject
- Exaple:
  - TO: All employees
  - FROM: Stan Leisures, CEO
  - DATE: 29. October, 2021
  - SUBJECT: Organization restructuring
- Sometimes ok to just send as an e-mail and use the standard e-mail headers (to, from, date, subject) as heading segment



# Opening segment

- Memo is supposed to go straight to the point: state the purpose of your memo quickly and clearly
  - Example starting phrases: *“I’m writing to inform you ...”* and *“I’m writing to request ...”*
- Deliver the most critical information what the memo is about in the first paragraph
  - *“I’m writing to inform you about the plans to reorganize our department in the near future. The reorganization will concern particularly the people working on the face recognition project.”*



# Context segment

- Provide context of the memo (which event or circumstances are concerned, or background of the problem to be solved)
  - *“As our company continues to grow, the current organization structure is not optimal for our activities any more. ...”*
  - *“As face recognition is becoming more relevant target application for our company, it has become evident that more resources should be allocated in face recognition software development.”*



# Task segment

- Includes the task statement describing what you are doing to help to solve the problem
  - *“You asked that I look at ...”*
  - *“I have decided to establish a committee to investigate the issue ...”*
- You may explain your intentions:
  - *“To determine the best approach to deal with the current situation ...”*
- Avoid too many details, include only what your reader needs



# Closing segment

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- Courteous ending with a clear statement on what is expected from the recipients
  - *“Meeting with a dinner will be arranged to discuss the issue on next Friday. Please RSVP me to confirm your attendance and inform about dietary restrictions before Wednesday.”*
- If no subsequent actions are required, it is still helpful to include information how you hope people to handle the news
  - *“No action is required from you at this point. I will inform about the details of restructuring later this week.”*
  - *“I’d appreciate your collaboration.”*



# Example progress report memo

**Subject:** Face recognition project progress report

As you know, I have been working on a project developing a face recognition system based on deep learning. I have finished the first prototype of the system a week ago, and started testing the systems with our standard face image database last week.

The first results show that the system can recognize faces with 90% accuracy, which is satisfactory. Unfortunately, the recognition process is very slow, taking about one minute per image. In the next phase, the main focus will be making the system work faster. I will meet Dr. Brown next week to ask for advice for optimizing the code.

Overall, the project is progressing on schedule. Assuming that the problem with speed can be solved, I will be able to start building the commercial version of the system in May 2019.

cc: Emily Brown

Attachment: Preliminary results with the prototype system



# Classroom task 1

- Read the two attached memos. Find the essential information:
  - What is the purpose of the memo?
  - Who is the audience of the memo?
  - What is the status of the project?
  - What is the main problem of the proposed/ongoing project?



# Classroom task 1: Memo 1

**Subject:** Product defect detection project proposal

As I have discussed with our CTO Mr. Johnston, our company has an urgent need for automated detection of product defects. I have had discussions with Prof. Mary Smith at Technical University of Smallville (TUS), and my strong impression is that the computer vision system developed in her team would be an appropriate solution for our needs.

The computer vision system from TUS is in a prototype phase and the implementation is available only in Matlab. For a production system that could be used at our company, the method should be re-implemented in C++. This will take more resources than we have available at the moment.

Based on the information available, I would propose to start a project for converting the TUS method into a commercially applicable product. To implement the project, we have a need for hiring two new software engineers. In addition, we need to negotiate the licensing cost with TUS.

cc: Charles Johnston

Attachment: Technical description of the TUS computer vision system



# Classroom task 1: Memo 2

**Subject:** Progress report / computer vision project

As you know, I have been working on a computer vision system that can be used for different purposes, for example automatic detection of defects in physical products on factory production line. Recently, I have started experiments to test the system using the available test material, and the results are promising. I expect to finish the experiments by the end of the next week.

In the next phase, I am planning to make new experiments with more realistic test data. Unfortunately, it seems that it is difficult to find relevant test material from public sources. I have sent a request to obtain test material directly from The Big Company, and waiting for their response.

In general, the project is progressing smoothly, and I expect to finish the technical report and the experiments before our next meeting. However, the progress is dependent on the availability of test material. If The Big Company is not willing to release their material, we need to use artificial material, and the test results may not be as reliable as with realistic material.



# Meeting minutes

- Meeting minutes will summarize the outcome of a meeting
  - Decisions made, next steps planned, identification and tracking of action items
  - Tangible record for the participants and source of information for those who could not attend the meeting
  - Can serve as notification or reminder for individuals of tasks assigned for them
- The items included in meeting minutes
  - Date and time (and possibly place) of the meeting
  - Names of the participants and those unable to attend
  - Acceptance or corrections/amendments to previous meeting minutes
  - Decisions made about each agenda item (depends on the agenda)
    - E.g. time and place for the next meeting



# Writing meeting minutes

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- Try to write as soon after the meeting as possible
  - In some informal meetings, writing during the meeting (based on agenda)
- Review and make sure all decisions and actions are noted
- Check for sufficient detail
  - Include a short statement and rationale of each action
  - If there are different opinions, summarize the major arguments
- Edit to ensure brevity and clarity
  - Be objective, avoid using personal observations
  - If referring to other documents, attach them as appendix rather than summarizing in the meeting minutes



# Classroom task 2

- Read agenda, follow dialogue and make notes for meeting minutes

**Invited to the meeting:** Dr. Charles Johnston (chairman), Dr. Mark Smith, Ms. Emily Hanson, Mr. Timothy Brownstone Ms. Claire Wellworth

## **Agenda:**

1. Opening of the meeting
2. Selecting the person to take notes
3. Accepting the last meeting minutes
4. Starting a new project with TUS
5. Any Other Business (AOB)
6. Next meeting
7. Closing the meeting





# Classroom task 2: dialogue (1)

**Charles:** Welcome to the meeting. I can see that Mark, Emily and Claire are here. Where is Timothy?

**Mark:** He is sick and couldn't come today.

**Charles:** Ok, hope it's not serious. Let's open the meeting. Who wants to take the notes this time?

**Claire:** I can volunteer.

**Charles:** Ok. Claire takes the notes. First we need to accept the minutes from the last meeting. Did everyone read it? Do you have any comments?

**Claire:** The date is wrong. The meeting was 20. September, not 21.

**Charles:** Ok. If there are no other comments, we can accept the minutes, with the date corrected.



# Classroom task 2: dialogue (2)

**All:** Ok.

**Charles:** Next item. We have a need for a new automated system to detect defects in our products. I have discussed with the Head Engineer Nicolas White and he told that Professor Mary Smith at Technical University of Smallville has a prototype system that could be suitable for this purpose. However, it is only a prototype, so we need to start a new project to implement it in C++. Do you have any opinions if we should start the project or not?

**Emily:** Is there any similar product we could buy and use directly? It can be cheaper than start a new project.

**Charles:** Nicolas told that there are no products that are ready to use for this purpose.

**Emily:** In this case, it is probably best to start the project.

**Mark:** Do we have enough resources to start the project?



## Classroom task 2: dialogue (3)

**Charles:** We need to hire two new software engineers. But I think our budget is sufficient for that.

**Mark:** In this case, I think it is ok.

**Claire:** Agree.

**Charles:** Ok. It seems that everyone agrees, so we can start the new project. Emily, would you be willing to start the recruitment process to hire the new software engineers?

**Emily:** Yes, it is ok for me.

**Charles:** Ok. So Emily will be responsible for hiring two new software engineers. I will send the requirements for the positions to her next week. Is there any other business?

**Mark:** Yes, the coffee machine is broken. We need to buy a new one.



## Classroom task 2: dialogue (4)

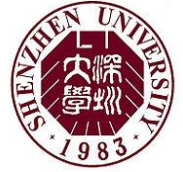
**Charles:** Ok, I think you can use our budget for that, if nobody opposes. Is it ok for everyone? It seems that everyone agrees. So, Mark will be responsible for buying a new coffee machine. Any other business? No? Then we can decide the time for the next meeting. Is 21. November ok for everyone?

**Claire:** I will be on my annual holiday on that week.

**Charles:** What about 24. November?

**All:** Ok.

**Charles:** Ok. The next meeting will be on 24. November. Thank you for attending, we can close the meeting.



# Classroom task 2: example minutes (1)

## The Big Company technical board meeting minutes

**Time and place:** 30. October, 2020, 1:30 pm, Meeting room 101

### **Attending:**

Dr. Charles Johnston (chairman)

Dr. Mark Smith

Ms. Emily Hanson

Ms. Claire Wellworth

### **Absent:**

Mr. Timothy Brownstone



# Classroom task 2: example minutes (2)

## **1. Opening of the meeting**

Chairman Charles opened the meeting at 1:32 pm.

## **2. Selecting the person to take notes**

Claire was selected to take the notes.

## **3. Accepting the last meeting minutes**

The date was corrected to 20 September. After correction, the minutes were approved.

## **4. Starting a new project with TUS**

Charles explained the background of the proposed project. After a short discussion, it was decided unanimously to start the project as proposed (see Appendix A). Emily will start the process for recruiting two new software engineers for the project. Charles will send the requirements for the positions to Emily next week after the meeting.



# Classroom task 2: example minutes (3)

## 5. Any Other Business (AOB)

Mark informed that the coffee machine is broken and needs to be replaced.

It was decided that Mark will buy a new coffee machine. He can use the department's budget for the purchase.

## 6. Next meeting

The next meeting will take place on 24. November, 2020.

## 7. Closing the meeting

Charles closed the meeting.

**Appendix A:** Project proposal for developing automated defect detection system



# Summary

- Memos, progress reports and meeting minutes are important for conveying information about project status and progress
  - Formal tone and expression, avoid emotional/personal language
  - More concise than scientific papers and technical reports
  - Honesty and integrity is essential (concerning e.g. problems in the project)
- Sources for this lecture:
  - <https://www.nature.com/scitable/ebooks/english-communication-for-scientists-14053993/118520487>
  - <https://www.wildapricot.com/articles/how-to-write-meeting-minutes>
  - [https://owl.purdue.edu/owl/subject\\_specific\\_writing/professional\\_technical\\_writing/memos/parts\\_of\\_a\\_memo.html](https://owl.purdue.edu/owl/subject_specific_writing/professional_technical_writing/memos/parts_of_a_memo.html)