

The day-to-day operation of a company depends on memos and informal reports that circulate within and among its departments. These documents report on various problems and present information about products, methods, and equipment. The basic informal format, easy to use in nearly any situation, has been adapted to many purposes throughout industry.

This chapter explains the elements of memos, the elements of informal reports, and the types of informal reports, including analytical reports, IMRD reports, progress reports, and outline reports.

The Elements of Memos

Memos are used to report everything from results of tests to announcements of meetings. In industry you must write memos clearly and quickly. Your ability to do so tells a reader a great deal about your abilities as a problem solver and decision maker. This section explains memo headings and provides a sample memo report.

Memo Headings

The memo format consists of specific lines placed at the top of a page: *To*, *From*, *Subject*, and *Date* lines. That's all there is to it. What follows below those lines is a memo report. Usually such a report is brief—from one or two sentences to one or two pages. Theoretically there is no limit to a memo's length, but in practice such reports are seldom longer than four or five pages.

Follow these guidelines to set up a memo or memo report:

1. If using a preprinted form, fill in the blanks; if not, follow guidelines 2–5.
2. Place the *To*, *From*, and *Subject* lines at the left margin.
3. Place the date either to the right, without a head, or at the top of the list with a head (*Date*:).
4. Follow each item with a colon and the appropriate information.
5. Choose a method of capitalization and placement of colons (see examples).
6. Name the contents or main point in the subject line.
7. Place the names of those people who are to receive copies below the name of the main recipient (usually with the head *cc*:).
8. Sign to the right of your typed name.

Memo Format: Example 1

Date on far right

February 14, 2007

Copy line
Signature

To: E. J. Mentzer
cc: Jane Thompson
From: Judy Davis

Judy Davis

Subject line—only
first letters
capitalized

Subject: Remodeling of Office Complex

Memo Format: Example 2

Date line
Memo heads in
all caps
Signature

DATE: February 14, 2007
TO: E. J. Mentzer
FROM: Judy Davis

Judy Davis

Subject line
capitalized for
emphasis

SUBJECT: REMODELING OF OFFICE COMPLEX

Memo Format: Example 3

Memo heads
aligned on colons

March 29, 2007

To: E. J. Mentzer
From: Judy Davis

Judy Davis

Subject: Remodeling of Office Complex

A Sample Memo Report

A memo can contain any kind of information that your audience needs. The following memo is a recommendation based on criteria.

April 1, 2007

To: Bill Foresight
From: Carol Frank, Food Service Director
Subject: Purchase of an open-top range

Purpose of memo
Credibility of writer

Basic conclusion first
Data to support
conclusion
Four criteria: cost,
energy efficiency,
rating, design
features

Here is a preliminary recommendation on which brand of open-top range to purchase for the Food Service Department. After comparing the specification sheets of several brands, I found that two brands satisfy our needs: Montague and Franklin, but Montague is the better choice. The Montague is cheaper (\$499 vs. \$512). It is more energy efficient; it has an overall rating of 103,000 BTU/hour, whereas the Franklin has a rating of 138,000 BTU/hour. The Montague has several design features not found on the Franklin, including a 3-position rack, a removable oven bottom, a continuous-cleaning oven, and a solid hot top. I will provide a detailed report next week.