

# Lecture 16



# Previous Lecture

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- ❑ Basics of Memo
- ❑ Purpose of Memo
- ❑ Structure of Memo
- ❑ Types of Memo

# Memorandum



## **Format (Outer Frame) [1/2]**

1. Memos have one-inch margins around the page .
2. All lines of the memo begin at the left margin.
3. The text begins two spaces after the subject line.
4. The body of the memo is single-spaced, with two spaces between paragraphs.
5. The sender usually signs the memo using initials, first name, or complete name.

# Memorandum



## **Format (Outer Frame) [2/2]**

- Be aware of the practices of addressing and distributing memos in your organization.
- Consider who should receive and in what order — senior managers, for example, take precedence over junior managers.
- If rank does not apply, alphabetizing recipients by last name is safe.
- Organization name, usually contained in the letterhead.
- Electronic copies of memos should not include simulated initials.

# Memorandum



## Additional Pages

- In case of a memo of more than one page, use a header, carry at least two lines of the body text over to that page.
- The header should include either the recipient's name or an abbreviated subject line, the page number, and the date.
- Place the header in the upper left-hand corner or across the page.

ACM Brochure Schedule Page 2 April 14, 2009		
Barbara Smith	2	April 14, 2009

# Memorandum



## Structure (Inner Frame)

- To:
  - For informal memos, the receiver's given name, e.g., 'To: Andy' is enough.
  - For more formal memos, use the receiver's full name. If the receiver is in another department, use the full name and the department name. It is usually not necessary to use Mr., Mrs., Miss or Ms. unless the memo is very formal.
  - If you are sending the memo to several people, list them after "To".
  - If the list is longer than a dozen names, place it at the end of the memo and reference it on the "To" line.

# Memorandum



## Structure (Inner Frame)

- **From:**
  - The writer's name and professional title go after this heading.
  - A 'From' section containing the name of the sender.
  - For informal memos, the sender's first name, e.g., 'From: Bill' is enough.
  - For more formal memos, use the sender's full name.
  - If the receiver is in another department, use the full name and the department name. It is usually not necessary to use Mr., Mrs., Miss or Ms. unless the memo is very formal.

# Memorandum



## Structure (Inner Frame)

- **Date:**
  - Dating a memo gives the organization a record of its correspondence.
  - To avoid confusion between the British and American date systems, write the month as a word or an abbreviation; e.g. 'January' or 'Jan'.
- **Subject:**
  - State the topic in a few words but make sure it communicates the point of the memo. E.g., “Changes in Employee Medical Benefits” is more specific than “Employee Benefits Program”.
  - Note: The order and placement of these headings may vary from organization to organization. The “To” line eliminates the need for a salutation, e.g., “Dear Mrs. Bernstein”.



# Memorandum



## Subject Line

- First line of communication.
- Includes a topic and a focus.

Example:

Subject: Request for Month-end Expenditures

Focus

Topic

# Memorandum



**CHARLES STURT**  
UNIVERSITY

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## Memorandum

To:

From:

Copy to:

Date:

Subject:

**Message**



# Memorandum



For example, a successful subject line would read as follows

***Subject: VACATION SCHEDULE FOR ACCOUNTANTS***

- **Accountants** is the topic of the memo; **vacation schedule** is the focus.
- The focus aids communication more than the topic. The topic of a memo, for instance, can stay the same, while the focus changes.
- Look at the following examples:

***Subject: SALARY INCREASE FOR ACCOUNTANTS***

***Subject: TERMINATION OF ACCOUNTANTS***

- In each of these instances, the topic stays the same: **Accountants**.
- Notice, then, how important the focus comments are.
- We see a huge difference between **salary increases, vacation schedules, and termination**.
- In addition to the identification lines, memos are initialed next to the **From line**.

# Memorandum



## ✓ Structure (Inner Frame)

- **Message [1/2]**
  - The content of the memo should consist of a concise introduction, one or more middle paragraphs conveying the details, and perhaps a brief conclusion.
  - Some memos are as short as one paragraph, or even one sentence.
  - Memo length is determined by the purpose and audience.

# Memorandum



## ☑ Structure (Inner Frame)

- Message [2/2]

- Unless the memo is a brief note, a well-organized memo message should contain the following sections:
  - a) Situation - an Introduction or the purpose of the memo.
  - b) Problem (optional) - for example: "Since the move to the new office in Kowloon Bay, staff has difficulty in finding a nearby place to buy lunch."
  - c) Solution (optional) - for example: "Providing a microwave oven in the pantry would enable staff to bring in their own lunchboxes and reheat their food."
  - d) Action - this may be the same as the solution, or be the part of the solution that the receiver needs to carry out; e.g. "we would appreciate it if you could authorize up to \$3,000" .
  - e) Politeness - to avoid the receiver refusing to take the action you want, it is important to end with a polite expression; e.g. "Once again, thank you for your support.", or more informally "Thanks".

# Memorandum



## ✓ A long memo has different sub-sections

- Summary
  - A summary, placed at the beginning of the memo, should condense the subject to five or ten lines. It should not contain jargon or highly technical language.

# Memorandum



## ✓ A long memo has different sub-sections

- Introduction [1/3]
  - The introduction states the memo's purpose and scope. You may add a paragraph or two of background material if the reader needs more information.
  - The introduction may also be used to ask or answer key questions, thank the reader, or give good news such as the approval of a proposal.
  - If you must refuse a request or reject an offer, use the introduction to establish your reasons before saying “no”.

# Memorandum



## ✓ A long memo has different sub-sections

- Introduction [2/3]
  - Two or three sentences that orient your reader about why you are writing to him or her.
  - This should not be an editorial (for example, don't include philosophy about how important this issue is to your company--your readers already know that).
  - Rather, the Introduction should inform the reader about specific background info regarding the project you are writing about (for example, who, what, when, where, why).
  - In most analytical memos, your tone should be unemotional and objective.



# Memorandum



## ✓ A long memo has different sub-sections

- Introduction [3/3]
  - Explain *why* you are writing (purpose).
  - State *what* you are writing about (subject).

Example:

Why you are writing?

To help me complete my monthly budget report, please send me a copy of your month-end expenditures.

What you are writing about?

# Memorandum



## ✓ A long memo has different sub-sections

- Discussion

- The facts of a situation need to be accurately identified and presented, and the arguments need to be reasoned and supported carefully.
- Explanation.
- Itemize your needs for easy access.

### Example:

Be sure to include the following expenses:

- Mileage
- Food
- Hotel room charges

details

# Memorandum



## ✓ A long memo has different sub-sections

- Analysis [1/3]
  - Before you engage in any analysis you need to tell your reader some things:
    - a) Data: What data will you be using? How and where did you obtain the data?
    - b) Method.: What methods will you be using to analyze your data?
    - c) Assumptions: Are there some key assumptions that you will be making during your analysis?

# Memorandum



## ✓ A long memo has different sub-sections

- Analysis [2/3]
  - Specific Analysis
    - a) This section may also be labeled "Findings", "Details", "Results", or something else that signifies that this is where you provide the details of your analysis.
    - b) This is for the reader that needs more specific information than the summary info presented in the key points listed above.

# Memorandum



## ✓ A long memo has different sub-sections

- Analysis [2/3]
  - Significance of Data
    - a) Most analytical reports require the incorporation of data in order to be convincing.
    - b) Data provide a sense of objectivity and encourage "managing by fact".
    - c) Data are usually expressed in either tables or graphs.
    - d) They can be placed inside the analysis section or at the end of the report as attachments.
    - e) In either case, all tables and graphs should have a title and its numerical reference.

# Memorandum



## ✓ A long memo has different sub-sections

- The **conclusion** summarizes the main points and discusses what action is required of the readers.
- The “From” line eliminates the need for a complimentary close (e.g. “Yours faithfully”).
- **Writer’s initials** – a memo is completed by the writer's initials, not his/her signature, immediately after the last sentence.
- **Distribution list** – names on the distribution list are usually typed in alphabetical order. However, if one of the individuals clearly outranks the others, place that name first.
- **Attachments** – if you have attachments, you may list them at the top of the memo or at the end.
- **Copies** – a duplicate copy of the memo should be held for future reference.

# Memorandum



## ✓ A long memo has different sub-sections

- Conclusion State what's next
  - *When* you expect a follow-up?
  - *Why* that date is important?

Example:

When

Please send your month-end expenditures by Wednesday at 3:00 p.m. This will allow me to complete the budget report by John's deadline.

Why



## Example Memos [1/6]

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### MEMO

To: Health & Safety Committee

From: Joe Chan, Chairperson, H&S Ctte

Date: 28 Jul '12

Subject: Room change for next meeting

The meeting on Saturday, 25 August has been changed to Room 101.





## Example Memos [2/6]

### MEMO

To: Katherine Chu, Regional Manager

From: Stephen Yu, Sales

Date: 28 July 2012

Subject: Notification of My Resignation

I am writing to inform you of my intention to resign from G & S Holdings.

I have appreciated very much my four years working for the company. The training has been excellent and I have gained valuable experience working within an efficient and professional team environment. In particular, I have appreciated your personal guidance during these first years of my career.



## Example Memos [3/6]

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I feel now that it is time to further develop my knowledge and skills base in a different environment.

I would like to leave, if possible, in a month's time on Saturday, 25 August. This will allow me to complete my current workload. I hope that this suggested arrangement is acceptable to the company.

Once again, thank you for your support.



# Example Memos [4/6]

CONTACT COMPUTER GRAPHICS

## MEMORANDUM

**To:** S M Chan, General Manager  
**From:** Samantha Ng, Office Manager  
**Date:** 28 July 2012  
**Subject:** Purchase of a Microwave Oven

### 1. Introduction

At the monthly staff meeting on Wednesday, 25 July 2012, you requested information about the possible purchase of a microwave oven. I would now like to present these details.

### 2. Background

Since the move to the new office in Kowloon Bay, staff have difficulty in finding a nearby place to buy lunch.

# Example Memos [5/6]

Brand	Model	Price
Philip	M903	\$2,800
Sharpe	R-3R29	\$2,600
Sonny	6145 X	\$2,400

## 3. Advantages

Providing a microwave oven in the pantry would enable staff to bring in their own lunchboxes and reheat their food. Also, staff members are less likely to return to work late after lunch.

## 4. Staff Opinion

A survey found that staff would like to use the microwave oven.

## 5. Cost

Details of suitable models are given below:



# Example Memos [6/6]

## 6. Request

If this meets with your approval, we would appreciate it if you could authorise up to \$3,000 for the purchase of the microwave oven.

*Samantha Ng*

Samantha Ng

# Memorandum

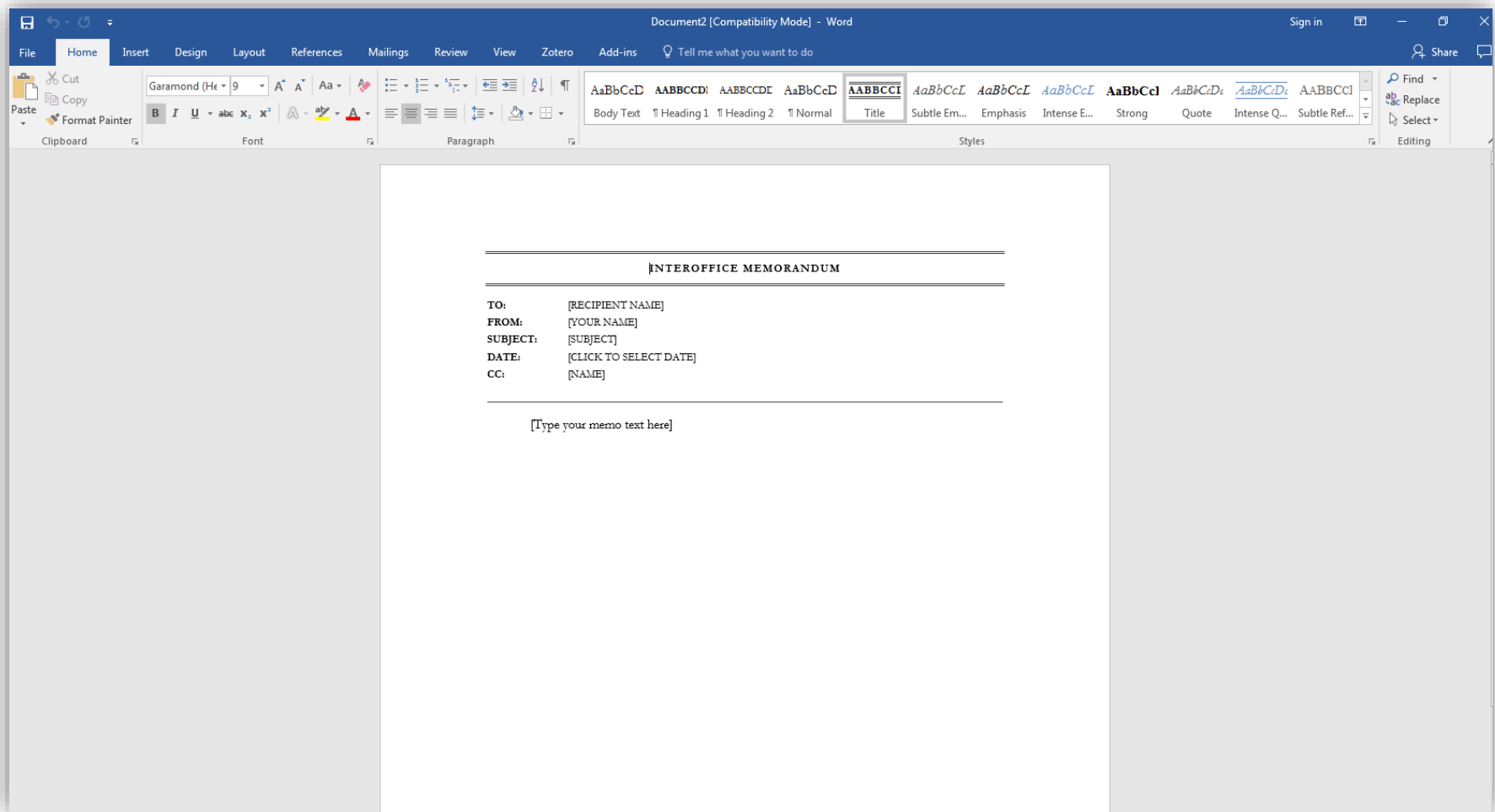


## Microsoft Word's Wizards/Templates

- Microsoft Word's Wizards/Templates help students to write memos (and letters, fliers, résumés, etc.).
- Students can access Wizards/Templates by clicking on File, scrolling to New, and then clicking on the Memos tab. Inside this file, they'll find templates for contemporary, professional, and elegant memos.
- Wizards/Templates help students format memos and provide the standard memo components. However, templates are restrictive, limiting the students' options.

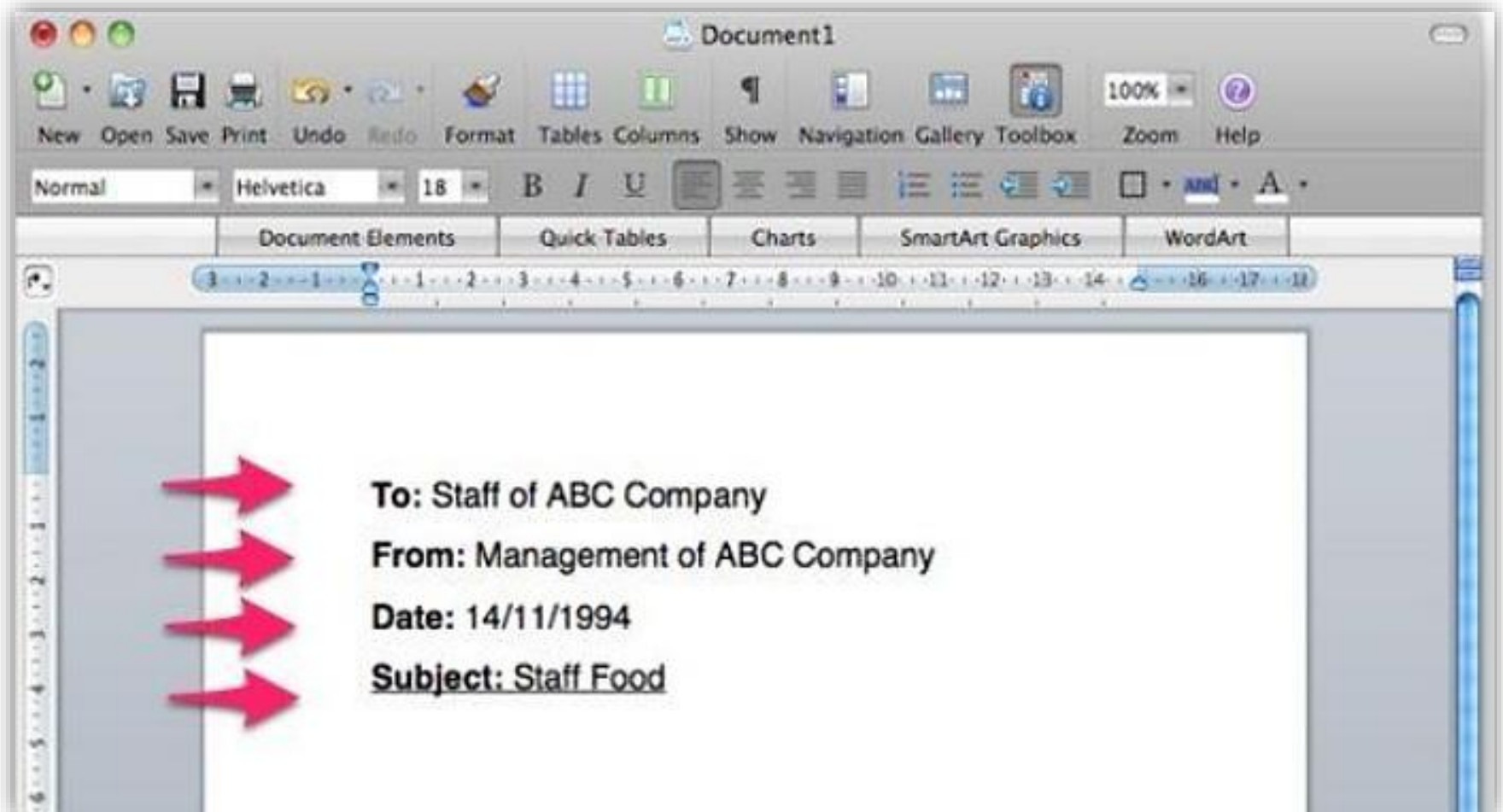


# Writing a Memo in Word



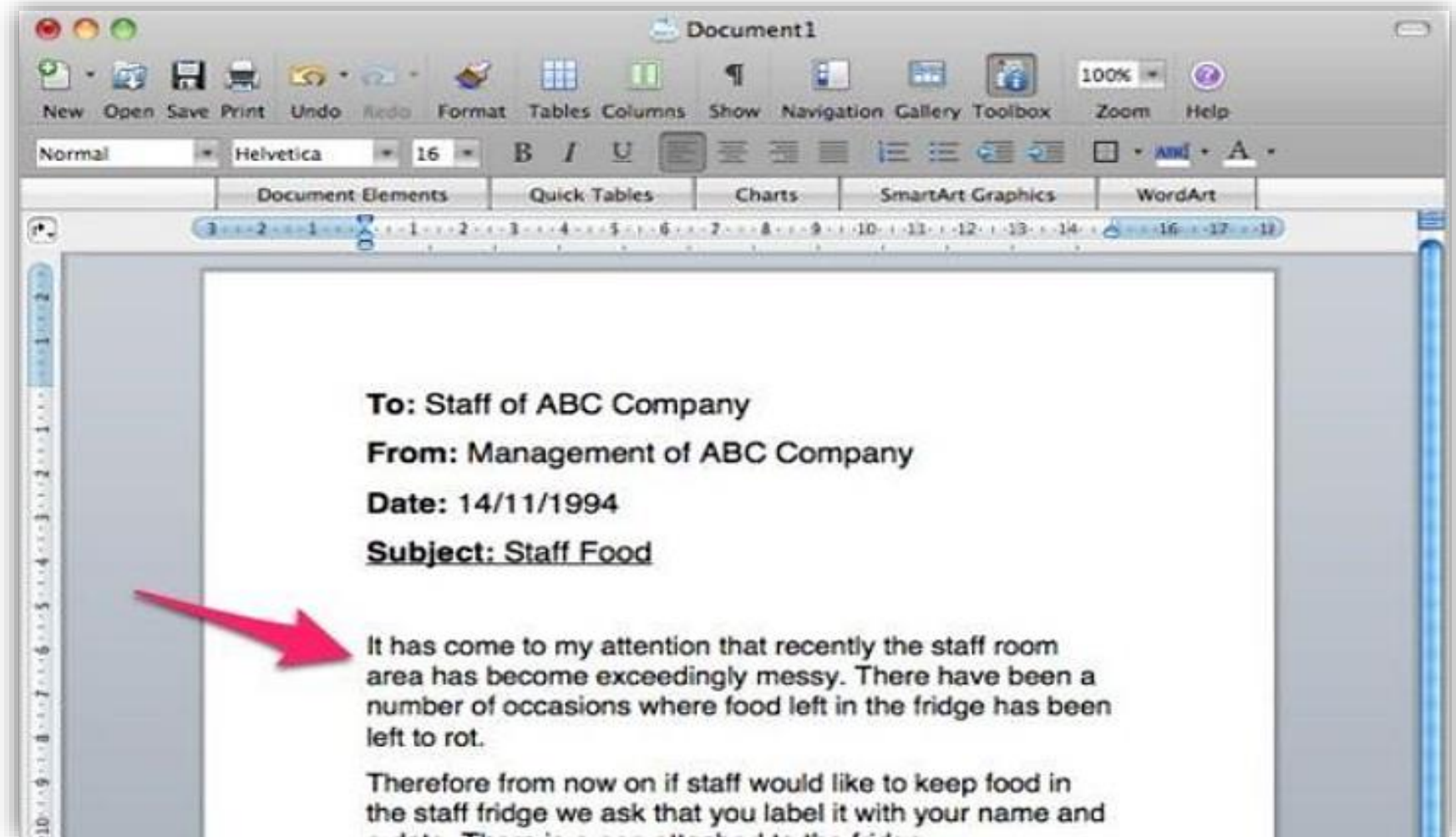
# Write the Heading Segment

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# Opening Segment



# Expanding in Discussion Segment

**To:** Staff of ABC Company  
**From:** Management of ABC Company  
**Date:** 14/11/1994  
**Subject:** Staff Food

It has come to my attention that recently the staff room area has become exceedingly messy. There have been a number of occasions where food left in the fridge has been left to rot.

Therefore from now on if staff would like to keep food in the staff fridge we ask that you label it with your name and a date. With this in mind:

1. There is a pen attached to the fridge so this will be easy for staff to implement.
2. We have asked the cleaners to throw out any food that is unlabelled at the end of the day.
- 3

In summary please keep you staff areas tidy it reflects poorly on our company and makes a bad impression if our staff do not respect their areas.

# Include a Summary Segment

**To:** Staff of ABC Company


**From:** Management of ABC Company

**Date:** 14/11/1994

**Subject:** Staff Food

It has come to my attention that recently the staff room area has become exceedingly messy. There have been a number of occasions where food left in the fridge has been left to rot.

Therefore from now on if staff would like to keep food in the staff fridge we ask that you label it with your name and a date. There is a pen attached to the fridge so this will be easy to implement.

A pink arrow points from the left margin towards the summary paragraph.

In summary please keep you staff areas tidy it reflects poorly on our company and makes a bad impression if our staff do not respect their areas.

# Finish with a Closing Segment


area has become exceedingly messy. There have been a number of occasions where food left in the fridge has been left to rot.

Therefore from now on if staff would like to keep food in the staff fridge we ask that you label it with your name and a date. With this in mind:

1. There is a pen attached to the fridge so this will be easy for staff to implement.
2. We have asked the cleaners to throw out any food that is unlabelled at the end of the day.

3

In summary please keep you staff areas tidy it reflects poorly on our company and makes a bad impression if our staff do not respect their areas.



We think everyone will benefit from having a tidy and hygienic staff room so please make an effort for you fellow co-workers.

# Close with a Call to Action

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staff do not respect their areas.

We think everyone will benefit from having a tidy and hygienic staff room so please make an effort for you fellow co-workers. I will be glad to discuss these recommendations with you later if there are any concerns.

Please clear out/label your food by 5pm today.





# Conclusions

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- Format of Memo
- Structure of Memo