

# Technical Communication





# Lead-in

What are the Four important channels through which information flows within the various sections of an organization?

- Face-to-face communication
- Communication over telephone
- Communication through email
- Communication through an inter-office memo



What is the efficient way to reach so many people at so many levels at once in an organization?

# MEMO



# Drafting Memos



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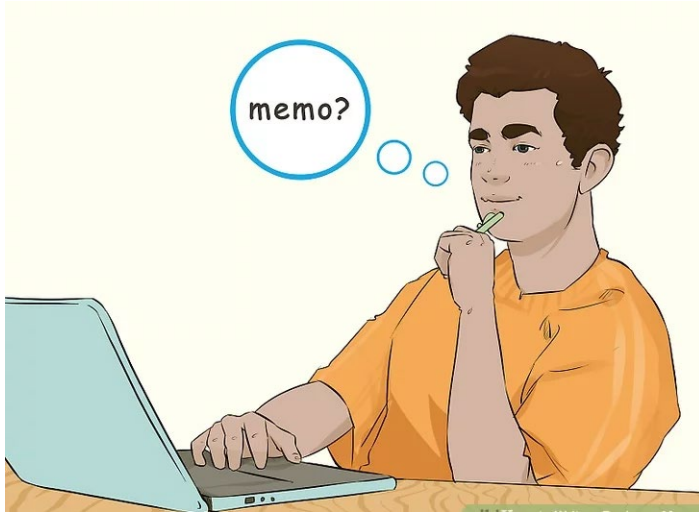
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**Useful Tips to Prepare Memos**





# Definition of memo



- shortened form of a Latin word “memorandum”
  - It must be remembered that ...
  - a note of something to be remembered
- 
- a document frequently used in a company or an organization for internal communication to convey information and deal with business



来自《希区柯克》

Then we'd better get started. Peggy, take a *memo*.

我们行动吧 佩吉 做好记录



来自《哈佛大学公开课-公正：该如何做是好》

when this *memo* of the Ford Motor Company's cost-benefit analysis

当福特汽车公司的这份成本效益分析备忘录



来自《恶老板》

It just said "Staff meeting" On the *memo*.

备忘录上只说是员工会议





来自《告密者2009》

You're kidding, right? I didn't get a *memo*.

开玩笑的吧 我没接到通知



来自《钢铁侠3》

I put a *memo* in the toilet, come on.

我在厕所都放了告示了 拜托



# Overview

备忘录是一种非正式的公文函件，通常用于在公司内部快速、有效地传递关于人事任免、会议通知、公司政策等方面的信息，是公司内部最普遍的书面交流形式。备忘录一般由日期、收件人、发件人、事由和正文组成，有时也会包括一般书信里常见的称呼语、结尾敬语和签名，但多数情况下省略不用。备忘录一般简洁短小，结构清晰、阅读方便、传递迅速。



# Functions of memos

- facilitate communication about various operations
- help arrive at some quick decisions
- help solve problems
  - by informing the reader about new information, such as policy changes, price increases **informative**
  - by persuading the reader to take an action, such as attend a meeting, use less paper, change a current production procedure **persuasive**
- enable the information to flow in 3 types of organizational communication:
  - vertical (upward & downward), horizontal and diagonal
- help bridge the communication gap among the various sections of an organization
- serve as permanent record of information





# Purposes of memos

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- To request for action or information
  - Compared with an oral request, a written request in the form of a memo is more difficult for the reader to forget or ignore
- To explain to the reader something that is not understood.
- To announce or to give formal notice to readers, publicly informing them about new procedures, new products, or anything that needs to be publicly known.
- To confirm the details of a meeting, conversation, or telephone call.
- To suggest solutions to business problems, to offer one's services or those of the department, or to bring up new ideas or methods of doing things.
- To report the details of a project at regular intervals as a way of helping the organization keep track of progress and problems.





# Classification of memos

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- **Documentary memos**

- mainly used for conveying information
  - **Memos to a subordinate** to remind, to announce, to give instructions, to explain a policy or procedure
  - **Memos to a peer or superior** to make a request or routine recommendation, or to confirm an agreement

- **Congratulatory memos**

- Used to give credit to employees of an organization for outstanding work they have accomplished

- **Disciplinary memos**

- issued to the employees who violate the rules or breach the code of conduct in an organization, for which they will be served with a severe warning or any other punishment as decided by the management



# Elements of a memo

Name of the organization and address (printed)

Standard memos are divided into **5 main segments** to organize information and to help achieve the writer's purpose.



National Steel Industries Ltd 12, Gandhi Marg, New Delhi 110002		
Interoffice Memorandum		
DATE: (complete and current date)	1. Heading	
TO: (designation to the recipient)		
FROM: (designation of the sender)		
SUBJECT: (what the memo is about)		
_____. (Opening)		2. Opening
_____ _____ _____ _____. (Discussion)		3. Discussion
_____ _____. (Discussion)		
_____. (Closing)		4. Closing
Signature	5. Signature	
Attachments:	Optional	
Distribution:		



# 1. Heading

AMRO MEMO

To: B. Pabst  
From: J. Alonso *J. A.*  
Subject: MIXER RECOMMENDATION FOR PHILLIPS  
Date: 12 June 2012

INTEROFFICE

To: C. Cleveland  
From: H. Rainbow *H. R.*  
Subject: Shipment Date of Blueprints  
to Collier  
Date: 2 October 2012

c: B. Aaron  
K. Lau  
J. Manuputra  
W. Williams

**NORTHERN PETROLEUM COMPANY  
INTERNAL CORRESPONDENCE**

Date: January 3, 2012  
To: William Weeks, Director of Operations  
From: Helen Cho, Chemical Engineering Dept. *H.C.*  
Subject: Trip Report—Conference on Improved Procedures  
for Chemical Analysis Laboratory

- Some organizations prefer the full names of the writer and reader; others want only the first initials and last names.
- Some prefer job titles; others do not.

Why do writers put their initials or signature next to the typed name?

To show that they have reviewed the memo and accept responsibility for it



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- The subject line, usually typed **in capitals**, communicate to the reader(s) the purpose of the memo.
- It should be specific but concise
- One-word subject line gives a vague idea about the contents of the memo, but lacks focus.



# Subject Line

Study the *Subject* line of the memo below. The writer has taken the four key words from the main message. Underline those words in the body of the memo.

**To: All staff**

**From: James Shepherd**

**Date: 23 June**

**Subject: Presentation on changes to pension scheme**

## MEMORANDUM

Due to the recent changes in government pension laws, the Head of Finance will give a presentation on Tuesday 1 July at 5.30pm in the canteen to outline any effect on the current company-based pension scheme. Staff with this policy are welcome to attend.





# Read and Write

Read the following memos and write the subject line.

Subject: Display of new  
factory plans

As you are probably aware, the company is currently considering plans for a new factory in the district of Campi Bisenzio. Models and designs will be on display in the conference room every day next week. All staff are welcome to visit at any time and give feedback.

Subject: Spanish classes

Please note that Spanish classes this year will begin on October 16th on Wednesday lunchtimes. Anyone wishing to participate should inform their line manager. Placement testing for new participants will take place in the training centre on Thursday 5th or Friday 6th between 12 and 1pm.



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To: B. Pabst  
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- Write out the month instead of using the all-numerical format.

In what order to list them?

- in alphabetical order (from A to Z)
- in descending order of organizational rank.



## 2. Opening

- A memo should start with **one or two clear sentences** informing the reader of **the need and purpose of the communication**.
- The purpose of a memo is presented in 3 parts:
  - **the context and problem**—the event, circumstance, or background of the problem being resolved or the topic handled in the memo
  - **the specific assignment or task**—the steps taken to help resolve the problem
  - **the purpose**—the reason for writing the memo and the prediction about what is in the rest of the memo



### 3. Discussion

- develop the arguments that support our ideas
- keep the communication brief since very few readers read every line of the memos they receive.
- Begin with the information that is most important.
- Follow the inverted pyramid pattern of communication. Start with the most general information and move to the specific or supporting facts.
- Try to make the text more reader-friendly by applying boldface type, headings, columns, and graphics.
- For easy reading, list the important points or details rather than writing in paragraphs when possible.
- Be careful to make lists parallel in grammatical form.



# Example 1

This year began with an increase, as we sold 4.5 million units in January compared to 3.7 for January 2012. In February we continued to improve with 4.6, compared with 3.6 for the same time in 2012. March was not quite so good, as we sold 4.3 against the March 2012 figure of 3.9. April was about the same with 4.2, compared to 3.8 for April 2012.

## Comparative Quarterly Sales (in Millions)

	2012	2013	Increase/Decrease
Jan.	3.7	4.5	0.8+
Feb.	3.6	4.6	1.0+
Mar.	3.9	4.3	0.4+
Apr.	3.8	4.2	0.4+





# Example 2

## Example 1

I personally went to the reprography section of our institute and found out that the photocopier is not effective because of the poor quality of stationery used. The paper used is very thin and hence the impressions of one side fall on the other.

## Example 2

Our committee examined the case and the details are given below:

1. Adequate quotations were not received for the purchase of the two machines. We found out that there are five dealers for the sale of these machines in our locality.
2. The machines were not properly checked as soon as they were received. They were sent to the production division directly.
3. The Purchase Manager does not have adequate explanations for this casual action.



## 4. Closing

- close with a courteous ending that states the actions expected from the reader
- always consider how the reader will benefit from the desired actions and how those actions can be made easier.
- A memo can end with some complimentary remarks or directive statements

tells the readers what exactly is to be expected or what they have to do next

motivates the readers and makes them feel happy



# Example

## Complimentary Close

- If our results continue to improve at this rate, we will attract more students during the coming years. Congratulations!
- Please accept my compliments for introducing this new computing system in your Division.
- There is no doubt that your conscientious efforts would help us accomplish our task without any difficulty. Keep it up!

## Directive Close

- I would like to resolve the issue only after hearing from you. Hence, kindly inform me before 25 August 2014.
- To complete your analysis in time, our Finance Manager would provide the necessary data tomorrow, 23 August 2014. Please bring along with you the registration details of the newly acquired land.



- Many memos end with one or more recommendations, which sometimes take the form of action steps: bulleted or numbered lists of what the writer will do, or what the writer would like others to do.

### **Action Items:**

I would appreciate it if you would work on the following tasks and have your results ready for the meeting on Monday, June 9.

- Henderson: recalculate the flow rate.
- Smith: set up meeting with the regional EPA representative for sometime during the week of May 13.
- Falvey: ask Armitra in Houston for his advice.



# Two optional items

- Necessary attachments

- Be sure to refer to the attachments in the memo
- Add a notation about what is attached below the closing

- Attached: Director's approval letter
- Attached: Several Complaints about Product, January–June 2014
- Attached: List of absentees on 17 July 2014

- Distribution

- To mention the designations of those people to whom a copy of the memo has been sent
- To be replaced by Cc (courtesy copy or complimentary copy)





# Sample memo 1

# Read and analyze

Heading

background and problem

Reasons for the purchase

Request for the purchase

Recommendation for the purchase

## National Institute of Technology Worli, Mumbai

### Interoffice Memorandum

Date: 25 August 2014  
To : Dean, Educational Hardware Division  
From: Manager, Reprography Unit  
Subject: PURCHASE OF THREE PHOTOCOPIERS

With the addition of four new departments and consequent increase in the number of both faculty and students, the volume of work in the reprography unit has considerably gone up.

The two CopyFast photocopiers that we have at present are no longer adequate to meet the demands. These machines were bought seven years ago and have become obsolete. Moreover, they break down frequently and need major repairs. This year alone we have spent Rs 25000/- to keep them in working condition.

Our estimate shows that we now require at least three more photocopiers to cope with the increasing demand. We have also studied the features and the cost of various brands of photocopiers currently available in the market.

We recommend the purchase of three ImageX5 photocopiers from Singhania Imaging Ltd., Mumbai. The price list is enclosed.

I request your approval for the purchase of these three photocopiers.

Sait Ali

Signature  
(written and printed)

Directive close



# What's wrong with this memo?

Match the number in the memo with the mistakes on the right.

## INTEROFFICE Memo [1.]

T0: Frank  
From: liam [2.]  
Date: December 12 [3.]  
Subject: New project [4.]  
Cc: Louise [5.]

Jim Fox, the president of Lotus Communication, wrote me recently. He proposed that we create a webinar together. [6.]

Lotus Communication works with major universities around the world. It offers online learning programs aimed at non-native English speaking university graduates. Jim would like us to work together to offer a live webinar describing our new business writing course. [7.]

The details and content of the webinar are up to us. Let's talk about it. [8.]

- a. Not clear about the value of the webinar
- b. Missing the year: 2015
- c. Alignment incorrect
- d. First letter of name not capitalized
- e. Not clear about the purpose of the memo
- f. Not clear about what action to take
- g. Capital letters missing
- h. Message not specific enough

### Suggested answers:

1. ( g ) 2. ( d ) 3. ( b )  
4. ( h ) 5. ( c ) 6. ( e )  
7. ( a ) 8. ( f )



# Read and Revise

Date: October 14, 2012

To: CompuMed Employees

From: Jim Goodwin

Subject: Problems

As you know, we are experiencing some problems at CompuMed. These include lower profits and stock value declines. We have a lot of unhappy stockholders. It's up to me to help everyone figure out how to solve our problems.

I have some ideas I want to share with you. I'm happy to have you share your ideas with me too. Here are my ideas: we need to consider consolidating departments and laying off some employees. We also might need to freeze wages and certainly it's time to freeze travel.

The best idea I have is for some of you to take early retirement. If all of you who have over twenty years vested in the company would retire, that would save us around 2.1 million dollars over the next fiscal year. And, you know, saving money is good for all of us in the long run.



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- One-word subject lines do not communicate effectively.
- There are spelling and grammatical errors.
- The tone is not appropriate and unacceptable.
- The suggested solutions to the problems are not specific and clearly presented.



# Revised version

## MEMORANDUM

Date: October 14, 2012  
To: CompuMed Employees  
From: Jim Goodwin  
Subject: Suggestions for Improving Company Finances

CompuMed is experiencing lower profits and declining stock value. Consequently, stockholders are displeased with company performance. I have been meeting with the Board of Directors and division managers to determine the best course of action. Here are ideas to improve our company's financial situation.

1. Consolidating departments—By merging our marketing and advertising departments, for example, we can reduce redundancies. This could save CompuMed approximately \$275,000 over a six-month period.
2. Reducing staff—We need to reduce employees by 15 percent. This does not necessarily mean that layoffs are inevitable. One way, for instance, to reduce staff is through voluntary retirements. We will be encouraging employees with over 20 years vested in the company to take our generous early-retirement package.
3. Freezing wages—For the next fiscal quarter, no raise increases will go into effect. Internal auditors will review the possibility of reestablishing raises after the first quarter.
4. Freezing travel—Conference attendance will be stopped for six months.

I encourage you to visit with me and your division managers with questions or suggestions. CompuMed is a strong company and will bounce back with your help. Thank you for your patience and understanding.

*JG*



# Useful tips on writing memos

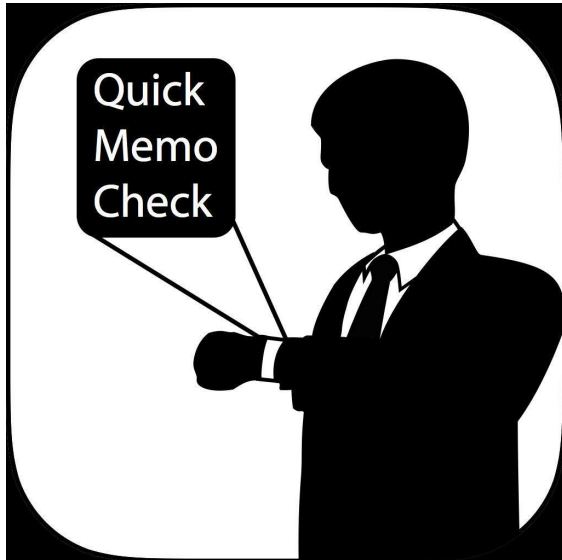
1. Use the standard format or the one prescribed by the organization.
2. Include all the necessary segments.
3. State clearly the context and purpose in the opening segment.
4. Keep in mind your relationship with the recipient to choose the degree of formality.
5. Maintain a positive or neutral tone.
6. State in the closing segment what action is expected from the recipient.
7. Use features like highlighting, bold face, etc. to draw attention.
8. Keep the memo short and to-the-point.







# Questions for review



1. Does the identifying information adhere to your organization's standards?
2. Did you include a specific subject line?
3. Did you clearly state your purpose at the start of the memo?
4. Did you include informative headings to help your readers?
5. If appropriate, did you summarize your message?
6. Did you provide appropriate background for the discussion?
7. Did you organize the discussion clearly?
8. Did you highlight items requiring action?

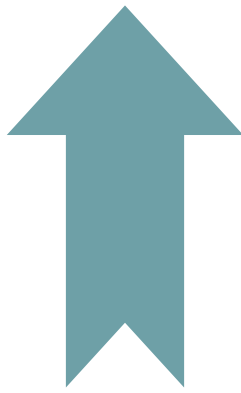


## Exercise

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Write a memo using a suitable format for the situation given below. Remember that your memo should be formal, clear, concise and contain only relevant information.

Your section moved to a new office on Thursday morning. However, the maintenance department within your organization has failed to carry out certain work. Word processors have not been wired to the laser printer; a metal bookshelf hasn't been built properly; the bottom drawer of the filing cabinet which holds standard forms, was damaged in the move and now doesn't open. Write a memo complaining about the situation and asking for action.



**Thank You for  
Attention!**

