# Memo Writing

Memo writing is something of an art form. A letter is not a memo, nor is a memo a letter. A memo is a short, to the point communication conveying your thoughts, reactions or opinion on something. A memo can call people to action or broadcast a bit of timely news. **With memo writing, shorter is better**.

As with all writing, memo writing needs a structure. Because they are short, rambling meanderings will soon destroy the memo’s effectiveness and become a waste of productive time to those that read it and to the person who wrote it.

If you have something longer than a page, it’s better to send it as an attachment or a document that follows the memo used as a cover letter. Never make a memo too long. If someone takes a glance at a memo that appears to be too long, there’s a good chance it will be set aside for a time when they aren’t busy. This can defeat your memo’s purpose which is timely communication.

### Basic Formats

Memos can be approached in different ways depending on your purpose:

1. **Decide if it’s to be persuasive or informative**. While many memos are a combination of the two (“In order to process your claim promptly, please submit it no later than January 15.”), sometimes memos have to be one or the other for the reader to take the appropriate action. A persuasive memo engages the reader’s interest before issuing a directive, where as an informative memo outlines the facts and then requests the reader’s actions.
2. **Clearly state the purpose of communication in the subject line**. Most memo formats have the basics of the header, like “to,” “from” and “date” in place. But you have a responsibility to make the subject line as descriptive as possible so the reader understands the intent. A memo simply titled “Vacation Time” might appear to be good news – until the document explains that vacation time won’t be granted unless first requested in writing. Thus, a better memo title might be “New Vacation Time Request Policy".
3. **Write memos with purpose and make that purpose known in the first paragraph**. Needless memo writing should be a crime across all states. One way to make sure no one reads or heeds memos is to send them out for the slightest issue. Try to avoid doing this. Also, outline the purpose and the desired action in the memo’s first paragraph. Readers will become conditioned to the importance of a memo and gain that knowledge as soon as they open it.
4. **K.I.S.S. – Keep It Simple, Silly**. Most memo formats accommodate one page of information. This means that the topic details should be concise, with clear directives and contacts for follow-up. If it’s a complex topic extending into multiple pages, still keep the language as direct as possible, add headings or bullets to guide the reader and conclude with a summary paragraph of key points.  
   Reinforce the reader’s necessary action. At the end of the memo, specifically direct the reader to the desired action.
5. **Effective business communication improves workflow and relationships**. Use the tools of memo formats and well-constructed information to your advantage.

### Parts of a Memo

There are three basic reasons to write a memo:

* to persuade action
* to issue a directive
* or to provide a report.

Regardless of your purpose, memos are generally divided into segments in order to organize the information and to achieve your intention.

#### Heading

The heading segment follows this general format:

TO: (readers' names and job titles)  
CC: (any people you are copying the memo to)   
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.
* Be specific and concise in your subject line.

#### Opening Segment

The gist of a memo should occur in the opening sentences/paragraphs. It's a good idea to include some information about the context, a task statement and perhaps a purpose statement.

1. The context is the event, circumstance, or background of the problem you are solving or the directive you are giving. You can use a paragraph to establish the background and state the problem or more commonly simply use the opening of a sentence. Include only what your reader needs and be sure it is clear.
2. In the task statement describe what you are doing to deal with a situation. If an action was requested, refer to it 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 xxx, I will...."
3. Finally, the purpose statement of a memo gives your reason for writing it and forecasts what is in the rest of the memo. You want to come right out and tell your reader the kind of information that's in store. For example, you might say: "This memo presents a description of the current situation, some proposed alternatives, and my recommendations." If you choose to use headings for your memo segments, you can refer to your major headings in this forecast statement to provide a guide for your reader.

#### Summary Segment

If your memo is longer than a page, you may want to include a separate summary segment. 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, but remember to keep it brief.

You can help your reader understand your memo better by using headings for the summary and the discussion segments that follow it. Try to write headings that are short but that clarify the content of the segment. For example, instead of using "Summary" for your heading, try "New Rat-Part Elimination System," which is much more specific. The major headings you choose here are the ones that will appear in your purpose-statement forecast.

#### Discussion Segments

The discussion segments are the parts in which you get to include all the juicy details that support your ideas. Keep two things in mind:

1. Begin with the information that is most important. This may mean that you will start with key findings or recommendations.
2. 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--->weakest.)
3. For easy reading, put important points or details into lists rather than paragraphs when possible.
4. Be careful to make lists parallel in grammatical form.

#### Closing Segment

You're almost done. After the reader has read your information, you want to close with a courteous ending stating 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: Several Complaints about Product, January - June 2007

### Examples

#### Persuasive Memorandum

To: Mary McGee, Alistair Warwranka, George Lipton   
CC: Dorothy Barrie   
From: The Boss   
Date: June 1, 2006  
Re: Need for New Memo Format

I’ve noticed that we don’t seem to be able to communicate important changes, requirements and progress reports throughout the company as effectively as we should. I propose developing one consistent memo format, recognizable by all staff as the official means of communicating company directives.

While I know this seems like a simple solution, I believe it will cut down on needless e-mail, improve universal communication and allow the staff to save necessary information for later referral.

Please talk among yourselves to determine the proper points of memo writing and return the input to me by 12 noon. I will then send out a notice to the entire staff regarding the new memo format.

Thank you for your prompt attention to this.

#### Directive Memo

To: All Staff  
From: The Boss   
Date: June 1, 2006  
Re: New Memo Format Effective June 1

In order to make interoffice communications easier, please adhere to the following guidelines for writing effective memos:

* Clearly state the purpose of the memo in the subject line and in the first paragraph.
* Keep language professional, simple and polite.
* Use short sentences.
* Use bullets if a lot of information is conveyed.
* Proofread before sending.
* Address the memo to the person(s) who will take action on the subject, and CC those who need to know about the action.
* Attach additional information: don’t place it in the body of the memo if possible.
* Please put this format into practice immediately. We appreciate your assistance in developing clear communications.

If you have any questions, please don’t hesitate to call me. Thank you.

#### Technical Memo

To: The Boss   
From: Sue Masterson   
Date: May 15, 2007   
Re: Update on the T-12 Phase Three testing

As we enter Phase Four of the T-12 testing, I wanted to provide a progress overview of the Phase Three testing.

[*The body of the memo might include two-four paragraphs outlining the purpose of the memo. If this is a longer memo, each paragraph will have a subhead to help guide the reader through the document. Finally, there is a summary paragraph, which features bullets highlighting the main points of each previous paragraph, and concludes the memo with a stated action required by the reader or writer.*]

Writing memoranda

A memorandum may be as long as a short report or as brief as a sentence. The main difference from a letter is the informality and immediacy of the memorandum. Because it is internal, it does not require the apparatus of addresses; because it is informal it does not require a greeting or a farewell; because it is immediate, it does not require a framework of courtesies. But a memorandum cannot be carelessly written. Tone is important; only careful choice of tactics can avoid the threat of misunderstanding. The most important advice is to avoid over-formal language, and to use every-day, clear and direct words and structures. A memo which starts:

The writer apprehends that difficulty has been experienced in achieving monthly targets…

will court failure. It would create a better impression written in simpler language:

I realize that you have found it hard to meet monthly targets…

Elaborate courtesies in memoranda rarely ring true, and in some circumstances invite a cynical reaction. A simple ‘please’ or ‘thank you’ is adequate, because its simplicity reinforces rather than detracts from its sincerity. Thus a balanced memorandum to the sales staff might read:

Our sales quota for the month has again been achieved by the middle of the third week. Head Office have commented favourably on our area’s performance. Thank you for your efforts.

The original version was less effective:

I am very pleased to tell you that our sales quota for the month has already been met, and it is only the middle of the third week. You will be delighted to know that Head Office has commented favourably on this area’s performance. Once again, my heartfelt thanks for your very real efforts.

A memorandum is a tool of management, a business device, aiming at convenience and speed. To spin it out with a multiplicity of ‘pleases’ and ‘thankyous’ is redundant. Memoranda should briefly state their message, and stop. Most activities are co-operative; few organizations work for the benefit of one person only. It is therefore usually possible to put any request in a form which makes some benefit for the reader clear, and a little thought will make the writer sensitive to the ways in which such tactics can be used. It is well worth while, in terms of co-operation and efficiency, to make the effort to adjust to a reader centered way of thinking. As an example, here is a memorandum which does its job less than efficiently:

Dictating letters

Many letters are dictated. This is neither as easy nor as timesaving as it appears. Spoken language is very different from written language; in general it does not have the same sentence structures, uses more and simpler words, and relies on intonation as well as syntax for structure and emphasis. Here is an exact transcription of a spoken talk on a technical subject:

Well if you take one of these animals and put it between two electrical erminals in a laboratory, and create a strong static electricity field, which doesn’t hurt the animal at all, it’s perfectly lively and unaffected by it, but it will start to discharge electrons; they fan out from the openings of the body, the openings in its external shell, its exoskeleton, and there’s an avalanche of electrons moving out and knocking into molecules of gas in the air, nitrogen molecules mostly, and these are excited, and because they’re excited, they glow, and so each individual insect, gives out rather a weak light, but if you look at it, in a darkened room, you can see this glow fanning out in all directions.

If you have never seen spoken language written down before, you have probably not thought how radical the differences are. The spoken voice, has an extra ‘code’, an extra system of signals to communicate with. Intonation, by rising and falling pitch, by varying loudness, and by grouping sounds, is able to communicate the structures and meanings of groups of words. Because of this, spoken language often does not need the same explicit system of grammatical structures which written language uses. Stripped of the ability to use this intonation code, the writer has to use the grammar code more fully. It is for this reason that transcribed dictation is often uncomfortable to read. It also tends to be more repetitious (often using the same word with different meanings in the same sentence) and to use long phrases rather than single words.

Simply talking into a dictating machine naturally produces the spoken variety of language. Therefore, when dictating, you must learn to reproduce the grammatical explicitness of written language while speaking. Here are three pieces of advice:

A dictated letter often lacks structure and headings. Therefore make a brief note plan of the main points before dictating. Look through these notes, determining the best order and dictate from them, clearly specifying paragraphs and sub-headings.

Dictate slowly, using deliberately short sentences. Because spoken language tends to make less use of what we would recognize as a sentence boundary, dictated letters often have long sentences. Sentences which seem short when dictating are frequently of the right length when written down. Try to dictate in a clipped style. Talking is easy and encourages verbosity and repetition. If you say things briefly, and stop before expanding, repeating or embroidering the point, the written result will be economical and effective as written language.

Finally, it is essential to edit dictation. The transcript may have a different tone from that intended. Here is an example of ‘raw’ dictation, with signs of loquacity and unusual structures in written language. It was unfortunately issued in this form:

Dr Brown used to work with Quintra and has now been appointed Production Manager at this comparatively new plant which so far has not been involved with exterior finishes but is about to do so having developed a range of pretreatment systems and undercoatings for the industry which is likely to expand very substantially over the next few years. He now wishes to introduce new window re-finishing lines and to this end has been sampled with our products. Evaluation of the other products continues but next week Dr Brown will advise E.C.D. of his requirements. At this stage, demand will certainly be small because in terms of manufacture they have had no previous experience as a company in producing these coatings.

When spoken, the oddities of grammar in structures like ‘which so far has not been involved…but is about to do so’ and ‘in terms of manufacture they have had no previous experience…’ would go unnoticed. Intonation would supply the structure which the grammar confuses. The letter also has very long sentences, and verbose phrases like ‘to this end’. Edit dictation to produce written language:

Dr Brown used to work for Quintra. He has been appointed Production Manager at this new plant. So far it has not produced external finishes, but is about to start. It has developed a range of pretreatment systems and undercoatings for the building industry (which is likely to greatly expand over the next few years). He wants to introduce new window re-finishing lines so I gave him samples of our products. He will continue to evaluate the other products; but he promises to tell us what his requirements will be next week. They have no previous experience in the company of producing these coatings, so orders will be small.

Clear and useful letters

No doubt many readers already follow the suggestions we have made here; but we are still surprised at the number of tortuously phrased and confusing letters we see. If writers are careful about adopting a direct and friendly tone, use simple, clear language, thoughtful tactics and a helpful layout, their letters create a favourable impression.