

Memorandums (memo)



Memorandums



- Intraoffice way of communication.
- Memos are written primarily to people **inside the organization**. With the exception of job applications, memos cover the same topics as letters. In addition, many internal reports, such as, trip reports, progress reports, and short proposals may take memo form.
- A memo is **less formal** than a letter.
- It usually **conveys one idea** and is likely to be **short**.
- Effective memos are clearly written with the **objective stated in the first sentence**.



Before writing a Memo, know:

- **Audience:** Knowing your audience will not only allow you to identify who to address it to, but also **determine the tone** of the document you will be writing.
- **Purpose:** The purpose of the memo will also affect how you write the document. Providing a list of instructions will require a more formal and professional tone, while an announcement regarding a company outing or party may be written in a festive manner.



Purposes of memo

- ❖ Making an announcement
- ❖ Providing instructions
- ❖ Clarifying a policy or procedure
- ❖ Alerting employees to a problem or issue
- ❖ Offering general information
- ❖ Providing a brief history
- ❖ Making a request
- ❖ Offering suggestions or recommendations
- ❖ Providing a record of an important matter
- ❖ Confirming an outcome
- ❖ Calling a meeting



Memo protocol

- ❖ Be timely
- ❖ Be professional
- ❖ Be tactful
- ❖ Send memos to the appropriate personnel



Memo format

- ❖ Heading
- ❖ Introduction
- ❖ Discussion
- ❖ conclusion



Heading

- TO: (readers' names and job titles)
- To: Aileen Kelly, Chief Computer Analyst
- FROM: (your name and job title)
- From: Stacy Kaufman, Operator, Level II.
- DATE: (Month day, year)
- Date: January 30, 2015
- SUBJECT: (what the memo is about, highlighted in some way)
- Subject: Progress report on the fall schedule

Introduction

- Tell readers about the problem, procedure, question, or policy that prompted you to write.
- Explain briefly any background information the reader needs to know.
- Be specific about what you are going to accomplish in your memo.

Discussion

- State why a problem or procedure is important, who will be affected by it, and what caused it and why.
- Indicate why and what changes are necessary.
- Give precise dates, times, locations, and costs.

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.

Conclusion

- Ask readers to call you if they have any questions.
- Request a reply- in writing, over the telephone, via email, or in person by a specific date.
- Provide a list of recommendations that the readers are to accept, revise, or reject.

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: Focus Group Results, January- May 2020

Organization

Professional communication forms are organized according to one of two strategies: Direct and indirect.

- **The *direct* organization** strategy presents the purpose of the document in the first paragraph (sometimes the first sentence) and provides supporting details in the body.
- **The *indirect* organization** strategy opens with relevant, attention-getting details that do not directly state the purpose of the document. The purpose is revealed in the body of the message, usually sandwiched between supporting details.

The direct approach is used for good news or routine communication; the indirect approach is used for persuasive, sales, or bad news messages.

Special Formatting and Mechanical Techniques

- Use enumerations to list important items
- Use solid capitals and centering to emphasize an important detail
- Use columns with headings to make reading and understanding easier

Special Formatting and Mechanical Techniques

- Use underlining and side headings to show natural breaks
- Use bullets to emphasize several points
- Use boldface and italics when appropriate
- Use color coding to attract attention

Important “Nevers” in Memo Writing

- Never write memos or any other communications which are unnecessary.
- Never write complicated, hard-to-understand memos.
 - Keep them simple and to the point.

Important “Nevers” in Memo Writing

- Never write rude, blunt, or thoughtless memos.
- Never send memos that have typos, misspelled words, or grammatical errors.
 - They are a poor reflection on you!

Important “Nevers” in Memo Writing

- Never waste space with unnecessary introductory material.
- Never leave out necessary details causing people to have to follow up with questions.
- Never use a closing line or a signature in a memo.

example

Plankton Engineering

To: Employees In Research and Development Team
From: Mary Silvers, Project Manager
Date: January 15, 2022
Subject : New Flex-Time Policy Beginning March 1, 20122

Plankton Engineering is offering a new flex-time schedule to all employees. You **Must** sign up for this plan by ***Feb. 20, 2022***, in order to use it.

Components of the Plan

Employees **must agree** to:

- Work 40 hours a week
- Work a minimum of 4 days a week
- Arrive at work no later than 9:30 a.m.
- Leave work no earlier than 3:30 p.m.

Example continued

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New flux

January 15, 2022

Scheduling Considerations

Employees may schedule work time as long as it fits the above criteria. Employees who sign up for this new flex time scheduling must declare their work hours during the previous week. The supervisor will take responsibility for recording each employees work schedule.

Employees who wish to try this new plan must stay on it for three months before returning to the current policy. Employees who may want to start it later, must wait until January of the next calendar year to sign up.

Important Reminder

Remember - Sign up **by Feb. 20** to take advantage of the new Flex-Time schedule.

Class assignment

- John Drummond, Vice President of Clocks, Inc. needs to inform Allen Cooker, the president, that a shipment of 3,000 clocks to the Las Vegas, NV, Clocks, Inc. store were defective. Write a memo as if you were Mr. Drummond explaining the situation, what action(s) have been taken to correct the situation, and the timeline for the action(s).