

# Drafting Memos

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## Definition of “memo”

- shortened form of a Latin word “memorandum” (备忘录)
- a document frequently used in a company or an organization for internal communication to convey information and deal with business

## Memo vs. Letter

	memo	letter
1	Typically used for internal communication within an organization	Typically used for external communication with individuals or organizations outside the company
2	Conveys information, instructions, or updates related to day-to-day operations or specific projects	Conveys formal or informal messages, inquiries, requests, or announcements to external recipients
3	Usually shorter in length, consisting of a few paragraphs or bullet points	Can vary in length, depending on the purpose, content, and formality of the communication
4	Typically written in a concise, direct, and professional tone	Can be written in a formal or informal tone depending on the intended recipient and purpose of the letter
5	<b>Addresses recipients within the same organization or department</b>	<b>Addresses individuals or organizations outside the company, such as clients, customers, suppliers, or business partners</b>
6	Often includes a header or subject line, date, recipient's name, and sender's name or department	Includes a header or letterhead, date, recipient's address, salutation, body paragraphs, and closing
7	May include headings, subheadings, or bullet points for clarity and organization	Typically follows a traditional letter format with an introduction, body paragraphs, and a conclusion
8	May reference specific internal projects, initiatives, or procedures relevant to the organization	May reference external events, business transactions, or specific topics related to the recipient or purpose of the letter

9	Can be sent electronically via email or posted on internal communication platforms	Can be sent via traditional mail, courier, or electronically through email or digital communication platforms
10	Often used for communicating updates, meeting agendas, policy changes, or memos of understanding	Used for various purposes, such as formal business correspondence, requests, inquiries, or response letters
11	Does not usually require a formal signature, as it is an internal document within the organization	Typically requires a formal signature, indicating the sender's authenticity and approval of the content
12	May include attachments, such as reports, spreadsheets, or additional documents for reference	May include enclosures or attachments, such as contracts, brochures, or supporting materials related to the subject of the letter
13	Generally circulated among relevant individuals or departments within the organization	Generally sent to specific individuals or organizations, with copies (CC) or blind copies (BCC) sent to additional recipients if necessary
14	Can be written by anyone within the organization, depending on the scope and purpose of the memo	Typically written by designated individuals or departments, such as executives, managers, or customer service representatives
15	Often used for informal communication, providing updates or reminders within the organization	Often used for formal communication, establishing professional relationships, or conducting business transactions
16	May use specific internal jargon, abbreviations, or acronyms understood within the organization	Uses language that is clear, concise, and easily understood by the intended external recipient

17	<b>May be distributed to multiple recipients simultaneously to ensure consistent communication within the organization</b>	<b>Generally addressed to a specific individual or organization, ensuring personalized and targeted communication</b>
18	Focuses on conveying information efficiently, promoting internal coordination, and ensuring clear directives	Focuses on establishing a professional tone, building relationships, conveying information, or making formal requests
19	Often used for informal feedback, reminders, or sharing updates within a specific department or team	Often used for formal business transactions, sales inquiries, complaint resolutions, or contractual agreements
20	Can be more flexible in terms of formatting, as long as it maintains clarity and readability within the organization	Follows standard letter formatting conventions, ensuring a professional appearance and adherence to proper business etiquette
21	<b>Can be written and circulated quickly within the organization to address immediate concerns or updates</b>	<b>Requires more time and attention to detail, as it represents the organization externally and can have a lasting impression</b>
22	May have a specific template or format within the organization to maintain consistency in communication	May vary in format and structure depending on the type of letter, such as a formal business letter, sales letter, or thank-you letter
23	Often does not require additional approval or review beyond the immediate supervisor or relevant departments	May require multiple levels of review, including legal, managerial, or executive review, before being sent externally
24	Can be informal in terms of language use, depending on the organization's culture or the relationship between sender and recipient	Requires formal language, proper grammar, and adherence to professional writing standards
25	Generally used for quick, concise, and internal communication, facilitating efficient information flow within the organization	Used for more formal, detailed, and structured communication with external parties, maintaining professionalism and representing the organization



## Functions of memos

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- **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.







# 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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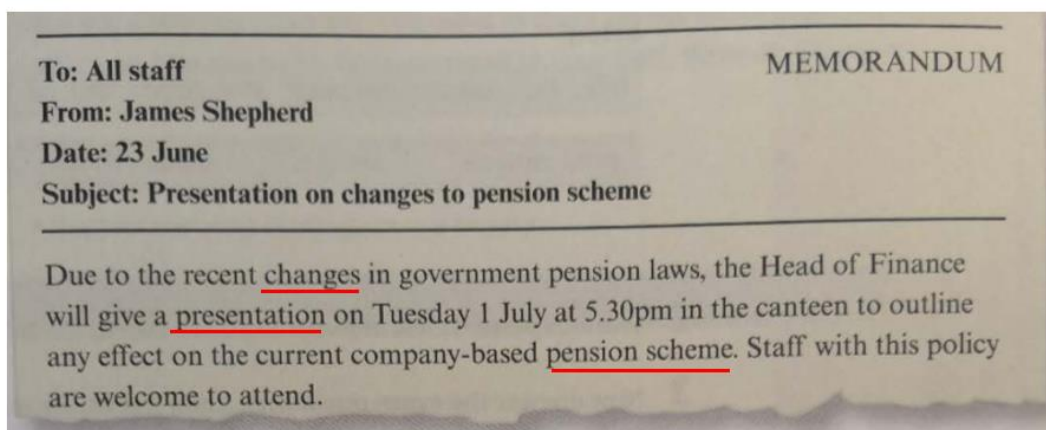
Subject: **Trip Report—Conference on Improved Procedures for Chemical Analysis Laboratory**

- 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.



## 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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- 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

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+

## 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

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### ● Necessary attachments

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

### ● 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)

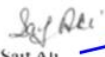
- Attached: Director's approval letter
- Attached: Several Complaints about Product, January–June 2014
- Attached: List of absentees on 17 July 2014





## Sample memo

## Read and analyze

National Institute of Technology Worli, Mumbai	
Interoffice Memorandum	
<b>Heading</b>	Date: 25 August 2014 To : Dean, Educational Hardware Division From: Manager, Reprography Unit Subject: PURCHASE OF THREE PHOTOCOPIERS
<b>background and problem</b>	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.
<b>Reasons for the purchase</b>	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.
<b>Request for the purchase</b>	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.
<b>Recommendation for the purchase</b>	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
	<b>Signature (written and printed)</b>
	<b>Directive close</b>



## What's wrong with this memo?

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.]

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

- Not clear about the value of the webinar
- Missing the year: 2015
- Alignment incorrect
- First letter of name not capitalized
- Not clear about the purpose of the memo
- Not clear about what action to take
- Capital letters missing
- Message not specific enough

### Suggested answers:

- (g)
- (d)
- (b)
- (h)
- (c)
- (e)
- (a)
- (f)



# Problem Memo Sample



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 alot of unhappy stockholders. Its 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 its 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.

- 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

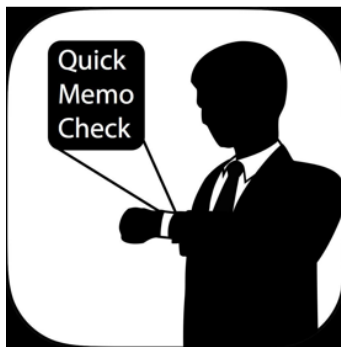
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1. Use the standard format or the one prescribed by the organization.
2. Include all the necessary segments.
3. State clearly the context and purpose in the opening segment.
4. Keep in mind your relationship with the recipient to choose the degree 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

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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?