Memos

A memo is a business letter distributed internally. Because in most cases it is read only by other employees of your own organization, the memo is somewhat less formal than a letter. But, like a letter, a memo is a legally binding document. For this reason, you should be sure that the memo reflects positively on you, your coworkers, and your organization.

You can expect to write memos often, probably every working day. And as your responsibilities increase, you will write more and more of them. Many memos are brief-one or two paragraphs. However, longer memos are now becoming quite common because writers are increasingly using the memo format rather than the formal report format. Formal reports are often cumbersome to distribute because in many organizations company policy requires that they be signed by a number of officials.

Memos and the Writing Process

Use the standard process in writing memos: analyze your audience and purpose, brainstorm, research, organize the information, and then draft and revise the memo. Keep in mind several points about memos as you work through the writing process.

First, the average memo is distributed to close to a dozen readers. Therefore, the chances are great that you will be writing to both technical people and executives. Consider whether a summary will help these executives. Most writers like to draft the body of the memo and then summarize it.

Second, because a memo is a relatively informal document, you can use an explicit statement of purpose right after the heading to gain your readers' attention and help them understand what you wish to accomplish in writing it. Thus you should make sure you have created a clear purpose statement for yourself as you prepare to draft; you might want to use that statement or some version of it in the memo itself.

Third, because the memo is relatively informal, you can include a number of headings, which will help your readers and, of course, help you, too. You can transform your outline into the memo itself without eliminating the headings.

Fourth, if your memo describes tasks that you or your readers will carry out, create a separate section to describe these tasks so that they are not overlooked in some larger discussion.

The Structure of the Memo

Most memos contain five elements:
1. identifying information
2. purpose statement
3. summary
4. body
5. action steps

1. ***Identifying information.*** Almost all memos have five elements at the top: the logo or a brief letterhead of the organization and the "To," "From," "Subject," and "Date" headings. Some organizations have a "Copies" or "cc" (carbon copy) heading as well.

   If your organization permits it, indicate the job positions of both yourself and your readers. This will clarify things for the other readers as well as for anyone who wants to reconstruct the context some time in the future. List the readers either alphabetically or in descending order of organizational rank.

   When you create the subject heading, make it as clear as possible. Instead of writing "Atlanta Audit," write "Results of Atlanta Audit." Otherwise, your readers will not know whether the memo is about the date, the location, the methods, the results, or any number of other factors related to the audit.

   Write the date with the month expressed as a word, not as a number. March 12, 2005 is clear, as is 12 March 2005. However, 3/12/2005 is unclear because in many countries the first number indicates the day, not the month, as it does in the United States. Type second and subsequent pages of memos on plain paper and include at the top of the page the name of the principal reader, the date, and the page number.

2. *Purpose statement*. Announce clearly the purpose of the memo. Following are two examples:

> **I want to tell you about a problem we're having calculating this year's research budget, because I think you might be able to help us.**

> **The purpose of this memo is to request authorization to travel to Brownsville on Monday to meet with the other personnel officers.**

Keep in mind a caution for political reasons, sometimes the purpose you express will differ from your real purpose. Thus you might write that the purpose of the memo is to "explain the value of the proposed change," whereas your real purpose is to persuade the reader to authorize the change.

3. *Summary*. The summary helps all the readers follow the subsequent discussion, enables executive readers to skip the rest of the memo, and serves as a convenient reminder of the main points. Following are two summaries:

> **The conference was of great value. The lectures on new coolants suggested techniques that might be useful in our Omega line, and I met three potential customers who have since written inquiry letters.**

> **The analysis shows that unanticipated equipment expenditures caused the cost overrun. We are now trying to determine why the equipment expenditures were not properly budgeted. See section 3b below for a discussion of our investigation methods.**

As this second example shows, the summary can direct the readers' attention to portions of the full discussion.

4. *Body*. Your subject will determine the nature of the body. Your analysis of the audience might call for an introduction and a background section followed by a problem-methods-solution structure. Or you might use a chronological, spatial, comparison-contrast, or any number of other patterns or combinations of patterns.
Use headings liberally throughout the discussion to help your readers.

5. *Action steps*. In describing follow-up actions, be sure to indicate who is to do what, and when it is due. Following are two examples of action-step sections.

> **Action:**
> **I would appreciate it if you would work on the following tasks and have the results ready for the meeting on Monday, June 9.**
> 1. **Henderson to recalculate the retrofitting costs.**
> 2. **Smith to set up meeting with the regional EPA representatives for sometime during the week of February 13.**
> 3. **Falvey to ask Armitra in Houston for his advice.**

> **Action:**
> **To follow up these leads, I will do the following this week:**
> 1. **Send the promotional package to the three companies.**
> 2. **Ask Customer Relations to work up a sample design to show the three companies.**

Example:

<div align="center">XYZ Computer Company</div>

To: William Wilson   From: Bob Hawkins
    Loretta Camey   Date: May 30, 2006
    Harold Effer   Subject: IBM Salesman's Views on Our Models B and E Machines
    Nelson Wyman

Purpose:
> This memo presents an IBM salesman's views about our Models B and E machines and R&D response to the salesman's comments.

Summary
> According to the IBM salesman, the Models B and E are quite good, but they have one major problem: the temperature is too high. In addition, he mentioned a less important drawback: training time is higher than the industry standard. I relayed these comments to Steve Brown in R&D, who said we are working on a new cooling system that will completely solve the problem, and new software to reduce training time.

Background
> I met the IBM salesman, by chance, on April 9 at a muffler shop. He has been promoted to the Product Planning Department of IBM in New Jersey starting next month; therefore, he would appear to be a reliable source of information. His department purchased a Model B and a Model E machine, and, after waiting a few weeks for delivery, trained on them for a week.

Salesman's Comments
> In our conversation, the salesman talked about the strengths of our machines and then mentioned two problems: high temperature and excessive training time.
>
> In general, he had high praise for the XYZ machines. In particular, he liked the idea of the rotary and linear stepping motor. Also, he liked having all the options within the confines of the machine. He said that although he knows we have some reliability problems, the machines worked well while he was training on them.
>
> The major problem with XYZ machines, he said, is the high temperature. According to his customers who have XYZ machines, the $4 cartridge lasts only about three days. This adds up to about $340 a year, about a third the cost of our basic Model A machine.
>
> The minor problem with the machines, he said, was that most customers are used to the IBM programming language. Since our language is very different, customers are spending more time teaming our system than they had anticipated. He didn't offer any specifics on training-time differences.

R&D's Response
> I relayed these comments to Steve Brown in R&D. Here is what he told me.
> High temperature: A reduction from 60°F to 50°F should help. In addition, the new cooling system will keep the temperature no higher than 55°F after 240 hours of use. R&D is fully aware of the temperature problem and has solved most of it.
>
> Training Time: New software is being developed that should reduce the training time.
> If I can answer any questions about the IBM salesman's comments, please call me at X1234.

Exercise

Find at least five undesirable parts of the following memo. Circle the problematic parts and correct them.

 Tom and Jackson   Book Co.

To. Daniel Chang   From: John
     Peter Anderson   Date: 6/5/2006
     Mary Drum   Subject: the budget problem
     Tom Hays

Purpose
this memo is to inform you that our next meeting will be held at 7,
Sunday morning.

Problems to be discussed (Action steps)
1. Be sure that you bring with you the complete set of documents you
    received on May 30, 2006.

2. All attendants are expected to provide one or two suggestions that
    may help reduce the year 2006's expenditure.

3. The meeting will last until solutions are settled.

If any further information is needed, please call me at X341.