Memo Writing

Memos have one purpose in life: as the authors of <u>Business Writing Strategies and Samples</u> put it, "Memos solve problems."

Memos solve problems either by informing the reader about new information, like policy changes, price increases, etc., or by persuading the reader to take an action, such as attend a meeting, use less paper, or change a current production procedure. Regardless of the specific goal, memos are most effective when they connect the purpose of the writer with the interests and needs of the reader. This handout will help you solve you memo-writing problems by discussing what a memo is, presenting some options for organizing memos, describing a the parts of memos, and suggesting some hints that will make your memos more effective.

What Is a Memo?

When you think of a memo, what do you think of? Is it a little piece of paper with a cute letterhead that says something like:

> "From the desk of ..." or "Don't forget ..." or "Reminders ..."

The message itself may be very simple--something like:

> "Buy more paper clips" or "Meet with President at 2:30" or "Mom, we're out of fudge pops."

While these memos are informative or persuasive, and may serve their simple purposes, more complex memos are often needed in an office setting. But don't let that worry you. Even though business memos may be more formal and complicated, the intention in writing one is still the same. You want to achieve your purpose with your reader effectively. This handout will show you how.

Basic Memo Plans

Standard office memos can be approached in different ways to fit your purpose. Here are three basic plans:

1. The direct plan, which is the most common, starts out by stating the most important points first and then moves to supporting details. This plan is useful for routine information and for relaying news.
2. The indirect plan makes an appeal or spews out evidence first and arrives at a conclusion based on these facts. This plan is best used when you need to arouse your reader's interest before describing some action that you want taken.
3. A combination approach can be used for the balanced plan. This plan is particularly useful when relaying bad news, as it combines information and persuasion.

Parts of a Memo

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

Heading Segment

The heading segment follows this general format:

> TO: (readers' names and job titles)
> FROM: (your name and job title)
> DATE: (complete and current date)
> SUBJECT: (what the memo is about, highlighted in some way)

Troubleshooting hints:

- Make sure you address the reader by his or her correct name and job title. You might call the company president "Maxi" on the golf course or in an informal note, but "Rita Maxwell, President" would be more appropriate for a formal memo.
- Be specific and concise in your subject line. For example, "Rats" as a subject line could mean anything from a production problem to a personal frustration. Instead use something like, "Curtailing Rat Extremity Parts in our Product."

Opening Segment

The purpose of a memo is usually found in the opening paragraphs and is presented in three parts: the context and problem, the specific assignment or task, and the purpose of the memo.

1. The context is the event, circumstance, or background of the problem you are solving. You may use a paragraph to establish the background and state the problem or simply the opening of a sentence, such as, "In our effort to reduce rat parts in our product...." Include only what your reader needs, but be sure it is clear.
2. In the task statement you should describe what you are doing to help solve the problem. If the action was requested, your task may be indicated 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 controlling the percentage of rat extremities, 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.

This is not the time to be shy. 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 plan to use headings for your memo segments, you can refer to your major headings in this forecast statement to provide a better guide for your reader.

Troubleshooting hints:

- Include only as much information as is needed by the decision-makers in the context, but be convincing that a real problem exists. Do no ramble on with insignificant details.
- If you are having trouble putting the task into words, consider whether you have clarified the situation. You may need to do more planning before you're ready to write your memo.
- Make sure your purpose-statement forecast divides your subject into the most important topics that the decision-maker needs.

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.

Troubleshooting hint:

You may want to wait until after the report is drafted and all conclusions and recommendations have been decided before writing the summary.

Discussion Segments

The discussion segments are the parts in which you get to include all the juicy details that support your ideas. Keep these 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. Here you want to think of an inverted pyramid. 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.)

Troubleshooting hints:

- For easy reading, put important points or details into lists rather than paragraphs when possible.
- Be careful to make lists parallel in grammatical form.

Closing Segment

Now you're almost done. After the reader has absorbed all of your information, you want to close with a courteous ending that states 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 1997

Good luck on your memo. If you look at this handout closely, you will see that, except for the heading segment, it follows the guidelines and hints presented here. These hints will also help you make your memo more successful.