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Writing@CSU Writing Guide

Business Memos

A memo, short for the word memorandum, comes from the Latin word memorandus, which means, "to be remembered." It is a compact written message designed to help someone remember something. For example, a list of groceries to be picked up on your way home from work is a memo, a simple list of things to be remembered later.

Once acted upon, a memo is often thrown away. Not so with business memos. Unlike letters, the external communications of a company, business memos are an internal form of communication and it is standard practice to save them. Their objective is to deliver information or instructions and writing them is no-nonsense, nose to the grindstone writing. Their scope should be limited to a single topic so that the reader will "get the message" quickly and, if necessary, take an action.

Confined to a single topic, each interoffice, interdepartmental and company wide memo becomes part of the institutional memory of an organization. They record daily activities and eliminate the need for time-consuming meetings. As historical documents they are often referred to when writing reports or resolving disputes regarding past activities. In short, they speed up the daily business of doing business; they keep people who need to be kept in the know, in the know.

When a business organization designs an official letterhead it often also designs an official memo sheet, complete with a company logo featured at the top of the page. Besides having a professional look and feel, preprinted memo sheets often provide

specialized information fields that accommodate specific procedures for expediting in-house communications.

When a preprinted memo sheet is not available, one can easily be designed. Click the links on the writing guides menu bar at left for tutorials on writing informational and instructional business memos. Each guide provides instruction, video commentary, and samples.

Informational Memos

An informational memo is an in-house communication addressed to one or more individuals. The objective is to convey one or more pieces of information that relate specifically to the topic in the subject line. Besides the actual information, the scope of a memo must provide a reason for why the information contained in it is relevant to the reader.

Identify Your Reader

Informational memos are often, though not always, intended for multiple readers. Regardless of whether you have one, several, or many, you know who they are because they work with you.

In most cases they are people from within your organization that share a need for the same information. On occasion, however, they will be from outside your organization and have strong internal ties, a subcontractor for instance, whose involvement in a joint project requires that you regularly communicate.

The degree, or closeness of your working relationship, combined with the nature of the information you are giving, will determine the level of formality that you should use in your heading.

Fill in the heading of your memo. Decide what level of formality you are going to use and fill in the TO field. While you are at it fill in the FROM and DATE fields. The SUBJECT field can be left alone for now.

Establish Your Objective

The objective of an informational memo is to reveal new or refresh old information in a manner that benefits or brings the reader up to date. It should be presented in a crisp and clear manner within a contextual framework that is easy to understand.

For an informational memo to be most effective, present the most important items in the opening paragraphs. People are busy; respect their time. Your readers may only have time to scan the highlights and headlines of your memo, let alone get to the end, but they will read your first paragraph.

Establish your objective. Below the heading, make a detailed list of the information you are providing. Be sure to think about how it is relevant to the reader. Answer the "W" questions. Fragments are O.K. Eventually this list will become part of your opening.

On completion your objective will be clearly outlined. Later, while drafting your memo, this list will be turned into complete sentences and a paragraph.

Determine Your Scope

The scope of an informational memo should stick closely to the subject line of the heading, making its objective clearly comprehensible to its readers while alerting them to the relevance of the information it is delivering.

The subject line should define the specific topic that your information relates to and the opening paragraph should remove any question from the reader's mind regarding the built in who, what, where, when and why's of that topic.

If required, a summary and discussion following the opening should flesh out the need-to-know details and close any "so what" doors that may have been left open. Think of it this way: the "ignore this memo" room is right through those "so what" doors. Shut them.

Determine the scope of your memo. First, write down a clear description of your topic in the subject line. Be specific. Next, review your list of answers to the "W" questions. Beef it up with new lines containing need-to-know information that helps

your reader understand the memo's relevance.

Again, sentence fragments are fine. On completion you will have determined your scope. Later, while drafting your memo this list will be turned into complete sentences and paragraphs.

Organize Your Letter

Before drafting an informational memo, pick out an organizational method that best suits the logical or sequential order in which you would like the details to appear.

A simple outline will help organize your thoughts. In the editing boxes of Steps 2 and 3 you have already begun this task by creating lists that helped you establish your objective and determine your scope. Refer back to them. Together they include much of the content that will become the body of your memo.

Begin to organize your memo. Review the work you did and organize your lists with an eye toward building a framework in which your reader will clearly understand the relevance of your information.

If your outline seems disorganized, you probably have something out of order. Feel free to move things around. On completion you will have a simple outline that you can use as a reference guide when you begin drafting your memo.

Draft Your Memo

The best way to draft an informational memo is to write quickly; you should work from an outline. You have already organized yourself with a sequentially ordered list, consequently you already have an outline. This list is all you need. Refer back to it and turn each fragment into a full and complete sentence expressing a single thought or idea.

Your voice needs to be natural and strong, clear and cohesive, as if you were speaking to someone in person. Write quickly and concentrate on communicating your objective. When you are through, read the draft out loud. Listen as if you were the reader. Does the scope of your memo contain everything on your organizational

list? Does it include everything the reader needs to know?

Keep in mind that you are writing a rough draft. For the moment you can ignore spelling and grammar, sentence and paragraph structure. Those are technical details that will be ironed out when you review and revise your work.

Begin to draft your memo. Start with the point that you feel the strongest or most confident about and then do the others. Remember to do this quickly. On completion you will have a rough draft that can be saved and edited.

Close Your Memo

An informational memo should close as crisply as it opens. Your last paragraph is a final opportunity to draw conclusions or make recommendations and it should clearly indicate that you mean business; however, it should also be treated as a good will building opportunity.

A personable and helpful tone is very much in order. Whenever you can, whenever it is appropriate, offer to be of further assistance. This seemingly small thing is actually anything but small; it reminds your readers that you are on their side, that you are a team player.

Close your memo. Add a final remark at the end of your draft and remember; this is an administrative tool used to convey important information. Be as personable as the relationship with your reader allows while respecting the hierarchical strata within your company. Upon completion you will have a finished draft that you can review and revise.

Review and Revise Memo

Reviewing and revising your draft is the last step in writing an informational memo. It is a final inspection time. Now is when you hone your memo's textual content, checking to see that your objective is clearly stated and that your scope is sufficiently inclusive for the reader to understand your directive.

Look for obvious errors. Check for misspelled words, poor sentence structure, and

grammar mistakes. Make sure that you have been direct and to the point. Use a strong active voice.

Keep in mind the overall cohesiveness of your memo. Look for accuracy, clarity, and a sense of completeness. Ask yourself if the transitions between paragraphs are working and if your point of view, tone, and style are consistent throughout the text.

Examine your word choices carefully. Ambiguous words lead to confusion. Jargon and abstract terms may not be understood at all and affectations, cliches, and trite language tend to diminish the substance of your message.

Review and revise your memo. On completion you will have a fully formed informational memo You should give yourself a break and then review it once again.

Instructional Memos

An instructional memo is an in-house communication addressed to one or more individuals. The objective is to convey one or more directives that relate specifically to the topic found in the subject line. It will both call for and expect an action to be taken. The scope of a memo must include enough information for the reader to understand exactly what the instructions are, who issued them, and when, where and why they are to be acted upon.

Identify Your Reader

Informational memos are often, though not always, intended for multiple readers. Regardless of whether you have one, several, or many, you know who they are because they work with you.

In most cases they are people from within your organization that share a need for the same information. On occasion, however, they will be from outside your organization and have strong internal ties, a subcontractor for instance, whose involvement in a joint project requires that you regularly communicate.

The degree, or closeness of your working relationship, combined with the nature of

the information you are giving, will determine the level of formality that you should use in your heading. In the sample informational memo the reader is identified by both his full name and the position he holds.

Decide what level of formality you are going to use and fill in the TO field. While you are at it fill in the FROM and DATE fields. The SUBJECT field can be left alone for now.

Establish Your Objective

The objective The of an instructional memo is to convey a clear-cut directive upon which its reader can then act. It should be presented in a crisp and clear manner within a contextual framework that is easy to understand.

For an instructional memo to be most effective, build toward the statement of your directive. By including your instructions in a discussion that follows the opening and summary sections, you show your readers how the directive fits into a larger picture.

Establish your objective. Below the heading, make a "to do" list. Fragments are O. K. Eventually this list will become the instructional part of your discussion. As such, it is the most logical place to start building your memo.

On completion your objective will be clearly outlined. Later, while drafting your memo, this list will be turned into complete sentences and a paragraph.

Determine Your Scope

The scope of an instructional memo should stick closely to the subject line of the heading, making its objective clearly comprehensible to its readers while alerting them to the relevance of the information it is delivering.

The subject line should define the specific topic that your information relates to and the opening paragraph should remove any question from the reader's mind regarding the built in who, what, where, when and why's of that topic.

If required, a summary and discussion following the opening should flesh out the

need-to-know details and close any "so what" doors that may have been left open. Think of it this way: the "ignore this memo" room is right through those "so what" doors. Shut them.

Determine the scope of your memo. First, write down a clear description of your topic in the subject line. Be specific. Next, review your list of answers to the "W" questions. Beef it up with new lines containing need-to-know information that helps your reader understand the memo's relevance.

Again, sentence fragments are fine. On completion you will have determined your scope. Later, while drafting your memo this list will be turned into complete sentences and paragraphs.

Organize Your Letter

Before drafting an instructional memo, pick out an organizational method that best suits the logical or sequential order in which you would like the details to appear.

A simple outline will help organize your thoughts. You have already begun this task by creating lists that helped you establish your objective and determine your scope. Refer back to them. Together they include much of the content that will become the body of your memo.

Begin to organize your memo. Review the work you did and organize your lists with an eye toward building a framework in which your reader will clearly understand the relevance of your information.

If your outline seems disorganized, you probably have something out of order. Feel free to move things around. On completion you will have a simple outline that you can use as a reference guide when you begin drafting your memo.

Draft Your Memo

The best way to draft an instructional memo is to write quickly; you should work from an outline. You have already organized yourself with a sequentially ordered list, consequently you already have an outline. This list is all you need. Refer back

to it and turn each fragment into a full and complete sentence expressing a single thought or idea.

Your voice needs to be natural and strong, clear and cohesive, as if you were speaking to someone in person. Write quickly and concentrate on communicating your objective. When you are through, read the draft out loud. Listen as if you were the reader. Does the scope of your memo contain everything on your organizational list? Does it include everything the reader needs to know?

Keep in mind that you are writing a rough draft. For the moment you can ignore spelling and grammar, sentence and paragraph structure. Those are technical details that will be ironed out when you review and revise your work.

Begin to draft your memo. Start with the point that you feel the strongest or most confident about and then do the others. Remember to do this quickly. On completion you will have a rough draft.

Close Your Memo

An instructional memo should close as crisply as it opens. Your last paragraph is a final opportunity to draw conclusions or make recommendations and it should clearly indicate that you mean business; however, it should also be treated as a good will building opportunity.

A personable and helpful tone is very much in order. Whenever you can, whenever it is appropriate, offer to be of further assistance. This seemingly small thing is actually anything but small; it reminds your readers that you are on their side, that you are a team player.

Close your memo. Add a final remark at the end of your draft and remember; this is an administrative tool used to convey important information. Be as personable as the relationship with your reader allows while respecting the hierarchical strata within your company. Upon completion you will have a finished draft that you can review and revise.

Review and Revise Memo

Reviewing and revising your draft is the last step in writing an instructional memo. It is a final inspection time. Now is when you hone your memo's textual content, checking to see that your objective is clearly stated and that your scope is sufficiently inclusive for the reader to understand your directive.

Look for obvious errors. Check for misspelled words, poor sentence structure, and grammar mistakes. Make sure that you have been direct and to the point. Use a strong active voice.

Keep in mind the overall cohesiveness of your memo. Look for accuracy, clarity, and a sense of completeness. Ask yourself if the transitions between paragraphs are working and if your point of view, tone, and style are consistent throughout the text.

Examine your word choices carefully. Ambiguous words lead to confusion. Jargon and abstract terms may not be understood at all and affectations, cliches, and trite language tend to diminish the substance of your message.

Review and revise your memo. On completion you will have a fully formed instructional memo. You should give yourself a break and then review it once again.

Formatting Business Memos

The format of a business memo differs in two significant ways from that of a business letter: 1) it does not include an inside address and, 2) it does not include a salutation or a complimentary close. Those elements, all of which are required in a business letter, are not required in a business memo.

There are only two formatting decisions to make, each of which is a simple matter of preference. The heading may be formatted either vertically or horizontally and the body in either a full or modified block style.

- Full Block Style: Left justified, single-spaced paragraphs separated by a double space.

- Modified Block Style: Indented, single-spaced paragraphs not separated by a double space.
- Secondary Pages: All but the first page should include a header containing the recipient's name, the page number, and the date.

The three elements of a business memo are the title, the heading, and the body. When additional notations are required they should be justified to the left hand margin two spaces below the body.

Memo Title

The title of a business memo is the word MEMO or MEMORANDUM, in an appropriate font style centered at the top of the first page. Printed in bold uppercase letters it informs the reader that the document is an internal communication.

There are no hard and fast rules governing the size of the letters but the font you select should be sized one or two points larger than that of the text found in the actual message. Standard message text is 12, so select 14 or 16 on your toolbar. Try each one on for size and pick one that pleases you.

Stick with your choice in all future business memo writing as a consistent visual appearance will help your readers develop the habit of recognizing the communications that come from your desk.

On a preprinted memo sheet the title word MEMO will appear below the company logo and above the heading.

Memo Heading

The heading of a business memo consists of four distinct information fields and should begin two spaces below the title.

Each field is identified by a single word, followed by a colon, printed in bold uppercase letters. Though not mandatory, it is generally accepted that their order of appearance is as follows:

TO:

- The recipient's name goes here. It is generally accepted practice that titles such as *Mr., Mrs.,* and *Dr.* are not used in this field. Formal situations do, however, call for using full names. A title or position, such as *Purchasing Agent* , should follow if appropriate.
- When informal situations call for using a first name or a nickname, by all means, go ahead. This is a judgment call that you should make based upon the relationship you have with the reader.
- When two or three people are to receive the same memo all of their names may be placed on the same line. They should appear either alphabetically or in descending order, according to where they rank in a company's organizational chart.
- When the number of people meant to receive the same memo is too large, place only the first or most important name on the line. The rest can then be named in a cc notation.
- On many occasions it is appropriate to use a generic term, such as *Colorado, Wyoming and Montana Sales Associates* in place of a proper name.

FROM:

- Your name goes here. As with the recipient's name, titles such as *Mr., Mrs.,* and *Dr.* are not customarily used in this field. In formal situations, however, you should use your full name, followed by a job related title, such as *Public Relations Manager*, if it helps identify you to those with whom you are not acquainted.
- Again, as with the recipient's name, your decision on the level of formality is a judgment call that should be based upon the relationship you have with the reader. If a first name or a nickname is appropriate, by all means, go ahead.
- You should hand write your initials near the end of your printed name. It personalizes your business memo while authorizing its contents.

DATE:

- To avoid any misunderstanding, the date should always be spelled out. It's a cultural thing.
- In the United States the numerical representation 7/4/04 means July 4, 2004; in other countries it means 7 April 2004.
- In a globally interconnected business world, accuracy on this point is essential.

SUBJECT:

- This field is important and needs to be precise and brief. It should indicate exactly what the memo is about. The reader should understand, at a glance, to what the information or instructions contained in the body pertains to.
- Trade Show as a subject doesn't cut it; it's too vague. *Trade Show/Travel Budget* is better, but *First Quarter Trade Show/Expense Account Rules* is much more complete.
- Capitalize all key words. Articles, conjunctions, and prepositions should be capitalized only when they occur at the beginning or end of your subject line.

A heading may be placed in either a vertical or horizontal layout. Pick the one you like and stick with it; a consistent visual appearance will help your readers develop the habit of recognizing the communications that come from your desk

Memo Body

The body of a business memo, depending on its subject, can be as short as one or two sentences or as long as several pages.

The longer the memo, the more important it is to select an organizational method that will make the logical sense to your reader.

Keep in mind that a memo ceases to be a memo if it goes on too long. If it requires more than two pages, review the content. You will want to see if you have gotten off-topic and strayed into other subject areas.

If you have two subjects, send two memos. If not, and the memo is still long, you may want to turn it into a report, or a summary of a report, and sent it out attached to a memo that briefly describes what it is about.

A complex memo will include the following four elements:

Opening

- Who, What, Where, When, Why? The opening sentence of a business memo should state the objective, or reason for writing.
- The objective is the answer to some or all of the "W" questions a person might reasonably ask after having read the SUBJECT line of a memo.
- Should one sentence not be enough to convey the objective, one or two more sentences can supply the background information necessary for the reader to comprehend the memo's purpose.

Summary

- Following the opening, furnish the details; provide, describe, and analyze whatever information or instructions are relevant to the subject at hand.
- The key is to present the details in an uncomplicated manner. The reader should be able to quickly single out specifically what is most important for him or her to know.
- This can often be done in a bulleted list, however, it is important to avoid going overboard. Lists by nature are short on context. They are great for simple messages but, nevertheless, you must supply enough information for the list to make contextual sense.
- More complex messages can be broken into subsections with descriptive headings printed in bold, underlined, or italicized.

Discussion

- When necessary, follow your summary with a section rounding out the details of your business memo. Include contextual material that specifically supports the information or instructions you are providing.
- Remember that a memo is also a reference tool and may be called upon at any time to provide a written snapshot of a previous event, action, or decision. Avoid being sketchy with the details.
- Include names of people, times of meetings, actions previously taken, decisions made, etc., whenever they bear directly on the subject of your message.

Closing

- Closing remarks are an opportunity to restate your observations and analysis, make recommendations, and propose solutions. You've put it in writing; now call for an action.

- If you expect cooperation, be considerate. As in any form of communication, a respectful tone goes a long way toward achieving the results you desire.

Additional Notations

A number of situations call for a business memo to be marked with additional notations. They should be placed two spaces below the body of the memo.

When a memo references one or more documents that are enclosed by the writer, the enclosure is noted in one of the following ways:

- Enclosure: Wholesale Pricing Packet
- Enclosures (5)
- Enc. (or Encs.)

When a memo has been dictated to an assistant it should be initialed. Both writer and assistant are acknowledged with their personal initials. The writer's initials appear in uppercase letters and the assistant's will appear in lowercase letters in one of the following ways:

- EIB: pjc
- IMK/pjc

When copies of a memo are sent to named business associates or other interested parties, those recipients are acknowledged with their full name as in the following example.

- cc: Annie Getz
- cc: Glenn Widget, Ida Mae Knott

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