

Memos—A Quick guide

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Functions and Audience

Short for “memorandum,” a memo is a type of document used to communicate with others in the same organization. Memos (or memoranda) are typically used for fairly short messages of one page or less, but informal reports of several pages may also employ memo format.

Format

Memos are distinguished by a header that includes DATE, TO, FROM, and SUBJECT lines.

Other lines, such as CC or BCC, may be added as needed. An RE (“Reference”) line may be used instead of SUBJECT, but this use is becoming rarer as “RE” is often mistaken as “Reply” because of its use in email.

- DATE: List the date on which the memo is distributed.
- TO: List the names of the recipients of the memo. If there are several recipients, it’s acceptable to use a group name, such as “All Employees” or “Personnel Committee Members.”
- FROM: List the name and job title of the writer(s).
- SUBJECT: Think of the SUBJECT line as the title for the memo. Make it specific so that readers can immediately identify the topic.

These headings are most often single spaced, and the SUBJECT line is often in all capital letters. The order of these items might vary, and the traditional header could be replaced with letterhead or a company template

The text of memos typically uses block format, with single-spaced lines, an extra space between paragraphs, and no indentions for new paragraphs. Even short memos benefit from a brief summary statement, and may still be organized with subheads and lists.

Summary Statements

Summary statements help focus readers’ attention and helps them to file or archive information for later access. Summaries can be as short as one or two sentences in a brief (1-2) page memo.

Example:

I am writing to summarize the progress on our current project. I will outline the work completed this week, share our next steps, and ask two questions that will help our team to wrap up this project.

Summary statements help a reader who might be scanning a document to note what is most important to their understanding.

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.

A directly stated purpose is welcome in good news or routine messages but could be viewed as abrupt or insensitive in a bad news or persuasive message. When the audience is not receptive to the message, it is best to lead up to the purpose gradually.

In both types of organization, action information (such as deadlines or contact information) or a courteous closing statement is placed in the last paragraph.

Organizational Strategy	Definition	Type of document	Introduction	Body	Conclusion
Direct	Writer arrives at purpose quickly, in a short summary statement	Used for good news, routine communication, and requested information (audience is receptive and neutral)	Summary Statement Purpose	Details, lists, background needed. Use headers and/or clear topic sentences	Action needed, links or references to further information.
Indirect	Writer gradually builds up to the purpose which is stated in the body	Used for negative, persuasive, or (sometimes) sales messages. (audience is resistant)	Relevant attention getting statements. (Background, impact statements)	Purpose statement is sandwiched with details and information	Action needed, links or references to further information.

Style and Tone

While memo reports and policy memos are examples of documents that have a more formal tone, most memos will have a conversational style—slightly informal but still professional. The audience of memos are those with whom the writer works, so the writing style usually assumes a relationship with them (and therefore a certain lack of formality); just keep in mind that the relationship is a professional one, so the writing should reflect that. When writing memos, you should consider your primary audience, but also keep in mind secondary or gatekeeping audiences who might be less familiar with you or your topic. Write with multiple audiences in mind.

Style Examples

Too Informal	Too formal, wordy	Balanced, concise
Hi, everyone. Hope you had a great weekend. You know those awards we give out every so often? It's time for those again!	Variety Craft Supplies' mission is to provide customers with affordable, quality supplies with superb customer service. Excellent customer service includes being knowledgeable about the supplies, but it also goes beyond that. It's about having the right attitude about helping customers. It's time to reward employees who have a customer-oriented outlook.	Please submit your nominations for the quarterly Customer Service Excellence Award by April 8. Help us identify great employees!

Common Memo Writing Situations

There is a lot of gray area between memos and email in most current workplace settings (as email has evolved to replace the memo as the main form of office communication. Memos are generally used for communication that needs to be archived or documented in some way for future reference. They are a record of announcements, information, documentation, or communication intended to preserve a communication trail (think chain of evidence here.) Below are some common types of memos:

- Status or progress reports
- Policies (changes and new)
- Instructions
- Procedures
- Announcements
- Reporting or requesting information

Distribution Medium

In organizations in which email reaches every employee (or every employee in the memo's audience), writers must determine whether to send a memo or an email message to convey their information. In cases such as this, writers should consider three factors:

1. The nature of the message,
2. The depth/number of its details,
3. Its likelihood of being printed for easier reference.

These types of messages should be written up in memo format and attached to an email message for fast (and environmentally friendly) distribution:

- Messages where a memo is requested. (Pay attention to the rhetorical situations in which you are writing)
- Messages that have an official aura, such as new policies or revisions of policies.
- Messages containing much detailed instructions, or information beyond 1-2 paragraphs.
- Messages requiring reference away from a computer

Sample Direct Memo

Memorandum

DATE: March 18, 2013
TO: Department Managers
FROM: Safiyya Dev, Store Manager
SUBJECT: Customer Service Excellence Nominations

Please submit your nominations for the quarterly Customer Service Excellence Award by April 8. Help us identify great employees!

Direct and concise opening states the purpose of the memo.

Do you have an employee whom you feel fortunate to have in your department? Does this employee show a positive and professional attitude when helping customers? Do you get frequent comments about this person's friendliness and helpfulness? Now, you have an opportunity to give this employee the recognition he or she deserves!

According to nominating criteria, nominees must . . .

Body paragraphs provide criteria that will enable the department managers to follow through on the request.

- demonstrate excellent customer service consistent with Variety Craft Supplies' policies;
- have worked at Variety Craft Supplies for at least six months;
- work 20 or more hours per week;
- not have received the Customer Service Excellence Award within the last year;
- have a record clear of oral and written warnings for the last six months; and
- have no work absences within the last six months.

The winner of the award will receive a framed certificate and a \$100 check.

A nominating form is attached. Please complete and return it to me by Monday, April 8. Thank you for your help in identifying and rewarding excellent customer service representatives.

Conclusion provides action information, deadline, and a courteous close.

Memorandum

DATE: February 25, 2013
TO: All employees
FROM: Kirk James, Call Center Supervisor
SUBJECT: Change in Operating Hours

Our call center has been experimenting with a half-day Friday work schedule over the last year, and we've recently conducted an evaluation to determine how well the program is working.

The introduction is relevant to the subject, but doesn't directly state the bad news—that the popular early weekend schedule is ending.

When a client calls to order their diabetic supplies on Friday afternoon, our messaging system directs them to complete their order on our company website. While many customers are willing and able to do this, many do not have Internet access (hence the reason for their call in the first place). Their only other option is to wait until Monday to place the order, and if a customer is already low on supplies, this may be untenable. Customers who are calling with questions or to resolve issues with an order must also wait for Monday.

Listing the reasons for the change mentally prepares the reader for it.

We have received positive comments, especially from our West Coast customers, about the extended hours we are open in the evening. We have determined that to continue to offer top-notch customer service, we must also re-institute Friday afternoon hours. However, that does not mean that we cannot continue to offer employees some scheduling perks. In fact, the addition of later hours Monday through Thursday provides us with more leeway in scheduling employees.

Bad news is clearly stated but sandwiched between two positive statements.

We will have a staff meeting on Monday, March 4, at 8:00 a.m. to discuss new scheduling procedures. To the extent possible, we wish to accommodate employees' preferences in scheduling, so it is important to attend this meeting to have your voice heard.

Memo ends with action information and a forward-looking statement.