

Memos

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Introduction

Written communication between employees in a company often comes in the form of a memorandum, or memo. Although e-mail is now the most prominent form of internal communication, memos will always exist for two reasons:

- Some employees do not have access to e-mail or the Internet in their job positions, and thus need paper forms of communication
- Original hard copies on letterhead with initials or signatures are often needed for legal purposes or working files

In almost every work environment, people write memos. Memo writing conventions vary from company to company, but memos generally follow the guidelines based in this handout. When writing a memo, you must carefully consider your format, audience, purpose, organization and style.

Selected Bibliography

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Houp, Kenneth and Thomas E. Pearsall. *Reporting Technical Information*. 4th ed. Encino, Calif: Glencoe Publishing, 1980.

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Stratton, Charles R. *Technical Writing: Process and Product*. New York: Holt, Rinehart and Winston, 1984.

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Format

Because memos are a type of internal communication, inside addresses, salutations and closings are not necessary. Memos have just two sections: the heading and the body.

Horizontal Heading Format

To: Name, Title

Date: Month Day, Year

From: Name, Title

Subject: Memo Description

Vertical Heading Format

To: Name, Title

C: Name, Title

From: Name, Title

Name, Title

Date: Month Day, Year

Subject: Memo Description

To: In a formal situation, you may want to use a courtesy or professional title (Mr., Ms. Dr., Professor); however, in most situations the first and last name are sufficient. Including a title after the name, such as Information Technology Director or Manufacturing Supervisor, is helpful if the memo is saved and read at some point after those employees are no longer working for the company.

C: or *CC:* Use these to indicate who will receive copies of the memo. If more than one person will receive copies, put their names in alphabetical order or in ranking order.

From: Include your first and last name and title. Handwrite your initials in ink to the right of your printed name and title. This indicates that you have reviewed and approved of the memo's contents (this is especially important if an assistant wrote/typed the memo for you).

Date: Write the full name of the month or use its standard abbreviation instead of numerals (e.g., February or Feb., not 2 or 02). Because we live in a global community in which some cultures put the month first and some put the day first, spelling out months equals less confusion.

Subject: Be specific about what is included in the memo. Don't write "Software Development Project" because that says nothing about what aspect of the project the memo refers to. Instead, use "Software Development Project Schedule" or "Software Development Project Test Results."

The first page of a memo should be printed on company letterhead. Second and subsequent pages should be on plain paper or sheets that match the letterhead without the logo or business insignia.

After the first page, include the name of the recipient, the date and the page number in the upper-left corner. For example:

Jeffrey Jones
Feb. 26, 2002
page 2

Audience

Before writing the memo, consider for whom you are writing. Are you writing for your supervisor who is very busy? Are you writing for a certain group of employees who need information on a particular project or policy? These considerations will affect how your memo is organized. See the Organization section for more information.

Also, audience will affect content. Perhaps you will need to define special terms or explain technical operations. Think about who you are writing for and what kind of knowledge or experience that person has.

Purpose

The purpose of your memo should be clearly stated up-front. Purpose statements typically are one or two sentences at the beginning of the memo stating why you are writing the memo. Here are a few sample purpose statements:

Based upon our previous discussion, I would like to join the following professional societies that relate to my position at ABC Company . . .

Please find below a status report for the Gizmo development project.

When your memo includes several purposes, one way to develop a purpose statement is to define the most important idea involved in your subject. For example:

This memo presents the test results for the Fuel Efficiency Project. Additionally, I have included recommendations for improvements and sample data from similar tests performed.

In this case, the author decided the most important information in the memo would be the test results. The recommendations and sample data are secondary information for the reader.

Organization

Memos need to be informative, direct and concise. Before writing a memo, it often helps to make a quick outline of the main ideas and points you want to cover and then organize that information into a logical sequence.

When organizing a longer memo, use section headings to direct the reader's attention, just as you would in a longer report. Section headings are described below.

Summary: Always include a Summary section when writing for a manager. This should be not more than a half-page long and should include the essentials of the memo, including the purpose statement, any findings or recommendations, and bottom line costs. (However, a memo that is one page or less does not necessarily need a summary.)

Background: The purpose of the Background section is to adequately acquaint your reader with the memo's subject. The extent of background you include depends upon your audience. If you are writing to a colleague who is very familiar with a project you are working on, you may not need much background detail. However, if you are writing to a new supervisor who knows nothing about your project, you will need more information here.

Discussion: This typically is the main body of your memo and will include the majority of the details on your subject. Again, be concise. Don't include information that the reader doesn't need to know. If the purpose of your memo is to persuade, include sufficient, concrete evidence to support your case. Bullet lists are perfectly acceptable within a memo and can help a reader find information more quickly.

Action Items: If you are writing a memo that requires action by other employees, state clearly who should be doing what.

You might also include sections such as Benefits, Cost Analysis, Design Concepts or whatever else fits the topic of your memo. The Summary section always should go first, but the other memo sections can be ordered in whatever manner is most logical for your subject.

Style

Because memos are a form of business communication, they are somewhat formal but not as formal as a letter to someone outside the organization. With that in mind, be natural but don't be chatty or too casual in your approach. Save small-talk and social niceties for face-to-face or phone contact.

Your tone should be neutral or positive. Avoid using ostentatious language or complicated sentence structures that can make you sound pompous. Be careful when writing about negative subjects, such as a memo directed to employees who are not adhering to a company policy. Being too cold, authoritative or condescending will alienate your audience, but being too soft will result in your directive being ignored. Thus, strive to be friendly and straightforward, which will project a considerate quality to your readers.

Sample Memo

Industrial Management Enterprises, LLC

Memo

To: Rebecca Smith, Industrial Client Services Manager
From: Jenny Taylor, Documentation Specialist
Subject: Reasons to Invest in Page Layout Software
Date: February 4, 2002

Summary

Considering the volume of documents that the Technical Documentation Department will be producing this year, as well as the length of these documents and manuals, I recommend that we purchase page layout software to ease the completion of our projects.

Reasons to Buy:

- Precise, efficient control over document design
- Industry standard for technical document production
- Proper software for commercial printing
- Money saved by bringing typesetting and design in-house

The expected cost is \$700 to \$900, depending on the chosen software package.

Background – Definition of Page Layout Software

Page layout software, also known as DTP (desktop publishing) software, allows users to easily manipulate large amounts of text and graphics, as well as prepare files for commercial printing. It allows for precise control over the positioning, sizing and design of text and graphics. Page layout software has design capabilities not typically found in word processors, such as Microsoft Word or WordPerfect. This kind of software is an industry standard in the technical documentation field, with the most common programs being Quark Xpress, Adobe Framemaker, Adobe PageMaker and Corel Ventura.

Discussion of Features

Page layout software has a multitude of features that make creating documents much easier than in a word processor.

Text Handling

Programs such as Quark and Framemaker can handle text documents with ease using functions such as styles and templates, which update the look and format of text automatically. These programs work well for long documents (such as our industrial engineering manuals) because they can build book files up to 2,000 pages long. While a word processor can create long documents, it cannot easily

handle the many changes that come up during the documentation process. Programs like Quark can handle changes without the need for laborious hand editing. For example, it can insert, delete and move pages and text sections in the middle of a document, create automatic “continued on” and “continued from” page numbers that update themselves, and link multiple files created by the documentation team in a network environment.

Graphics

Images can be imported, scaled and integrated within text more quickly. The software also allows designers to place image holders for graphics that are not available yet and to automatically update graphics that have been changed by the technical illustrator. Graphical elements, such as boxes and lines, can be drawn in the document with a click of a button. Additionally, graphics can be color managed within the software for printing purposes.

Indexing

Many page layout programs come with automatic table of contents and index generation functions. Certain words and heading styles are “tagged” to create the table of contents and indexes. The indexing function can also create cross-references for specified words.

Commercial Printing

Most commercial print houses print documents created in page layout software, rather than word processing software, because the page layout programs can easily convert files into the programming language (Postscript) required by the imagesetter (a high resolution printer). Commercial printers typically don't accept files created in Word or WordPerfect.

Web Capabilities

New page layout software can convert files to HTML and XML to allow companies to put their manuals and documentation on the web without re-editing and re-formatting.

Overall, page layout software has features that allow users to efficiently create documents for commercial publishing, especially book-length documents. Word processors have some of these same features, but they do not allow users to have the precise control needed for professional designs, cannot easily handle changes midstream for long documents, and cannot create the proper files for high-quality printing.

Cost Justification

Without page layout software, we would have to hire a desktop publishing service to complete and prepare the manuals for commercial printing. The cost for outsourcing can range anywhere from \$30 to \$70 per hour. Spending \$700 to \$900 for a program such as Framemaker or Quark will lower the company's costs and pay for itself in the long run.