

# 15 Memos

Considering Audience  
and Purpose

Memo Parts and Format

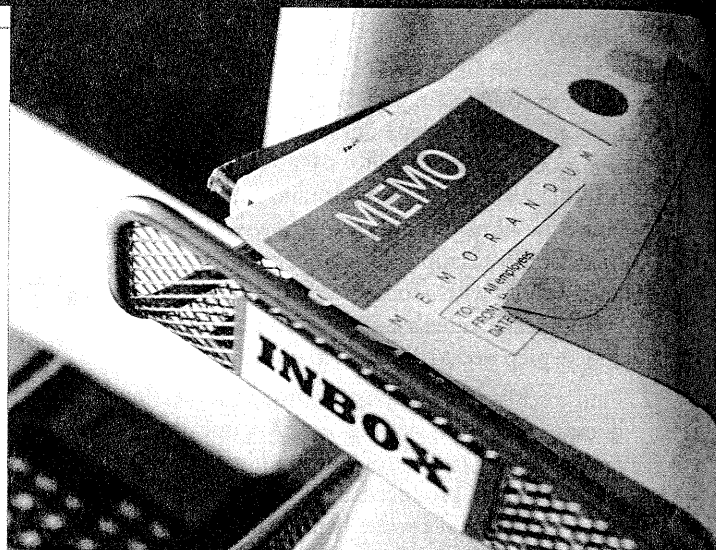
Memo Tone

Common Types of Memos

Guidelines for Memos

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Projects



"In my company memos circulate constantly about any serious topic. Everyone is busy and you must be very clear about why they need to read your communication and, if appropriate, act on it. You are constantly competing to get the 'mindshare' of your readers. Memos are less likely to be overlooked or accidentally deleted than emails and, in our company, at least, memos tend to be written with more care than emails. Maybe the difference is in the deliberate steps of writing and revising a memo for content, format, and tone, then printing it out and reading it over before distribution—instead of firing off a quick email that the writer might end up regretting."

—Mary Hoffmann, Marketing Communication  
Manager for a major computer company

## LEARNING OBJECTIVES FOR THIS CHAPTER

- ▶ Appreciate the vital role of memos in the workplace
- ▶ Picture a typical memo's audience and purpose
- ▶ Know the parts and format of a standard memo
- ▶ Understand the importance of proper tone in all memos
- ▶ Write various common types of memos

The most traditional form of everyday workplace correspondence is the memo, or memorandum. The word *memorandum* is derived from the same Latin roots as the words *memorize*, *remember*, and *remind*. Accordingly, memos give directives, provide instructions, relay information, and make requests.

Typically distributed to employees within an organization and not to people outside the company, memos are easy to post in a workstation or office, and they provide a paper trail.

Organizations rely on memos to trace decisions and responsibilities, track progress, and recheck data. Therefore, any memo you write can have far-reaching ethical and legal implications. Be sure your memo includes the date and your initials or signature. Also make sure that your information is specific, unambiguous, and accurate. Do as much research as needed to ensure that you have all your facts straight.

Definition of memos



Chapter overview

(Go to Student Resources > Chapter 15)

Memos have ethical and legal implications

## CONSIDERING AUDIENCE AND PURPOSE

To determine your approach to any particular memo, identify the various audience members who will receive it. Some companies use standard memo distribution lists: a list for managers, a list for software developers, and so on.

The purpose of your memo should also be clear: Is it to inform your audience? To persuade people to support a new plan? To motivate them to take action? To announce bad news?

Despite its explosive growth, email has not entirely taken the place of paper memos. (Memos are often turned into PDF files and attached to emails, or emails themselves can function as memos.) Although email leaves a digital trail, it is considered less formal than a memo. Also, an email message may be ignored when received in crowded in-boxes and may be inadvertently forwarded to the wrong parties. Organizations have different preferences about when memos should be used in place of emails. (For more on email, see Chapter 16.)

Audience considerations

Purpose considerations

Memos versus email

## MEMO PARTS AND FORMAT

Standard parts of a memo



**Memo model and template**  
(Go to Student Resources > Chapter 15 > Models and Templates)

A standard memo has the word “Memo” or “Memorandum” centered at the top of the page and includes a heading (flush to the left margin) identifying the recipient(s), sender (and sender’s initials), date, and subject. At the bottom of the memo, include a distribution notation if copies are to be sent to anyone not listed in the “To” line (usually managers who simply need to know that the memo was sent). Because memos are often read rapidly by busy recipients, they must follow this consistent, predictable format. Figures 15.1 and 15.2 show these standard elements.

The body copy (main text portion) of a memo should focus on one topic. Content should be complete yet compact, providing all the information readers need but not going into unnecessary detail. Organize the body of your memo by starting with a short introduction, and then a paragraph or two to address the main issue. Conclude by suggesting a course of action or asking your readers to follow up. Figure 15.3 shows a typical memo with all parts labeled.

## MEMO TONE

As a form of “in-house” correspondence, memos circulate among colleagues, subordinates, and superiors to address questions like these:

- What are we doing right, and how can we do it better?
- What are we doing wrong, and how can we improve?
- Who’s doing what, and when, and where?

Memo topics often involve evaluations or recommendations about policies, procedures, and, ultimately, the *people with whom we work*.

Because people are sensitive to criticism (even when it is merely implied) and often resistant to change, an ill-conceived or aggressive tone can spell disaster for the memo’s author. So, be especially careful about your tone. Consider, for instance, this evaluation of one company’s training program for new employees:

A hostile tone

No one tells new employees what it’s *really* like to work here—how to survive politically: For example, never tell anyone what you *really* think; never observe how few women are in management positions, or how disorganized things seem to be. New employees shouldn’t have to learn these things the hard way. We need to demand clearer behavioral objectives.

Instead of sounding angry and demanding, the following version comes across as thoughtful and respectful:

A more reasonable tone

New employees would benefit from a concrete guide to the personal and professional traits expected in our company. Training sessions could focus on appropriate attitudes, manners, and behavior in business settings.

## NAME OF ORGANIZATION

MEMORANDUM Center this label on the page or set it flush left (as shown)

To: Name and title of recipient  
From: Your name and title (and initials or signature), for verification  
Date: (also serves as a chronological record for future reference)  
Subject: ELEMENTS OF A USABLE MEMO (or, replace *SUBJECT* with *RE* for  
in reference to)

**Subject Line**

Be sure that the subject line clearly announces your purpose: (RECOMMENDATIONS FOR SOFTWARE SECURITY UPGRADES) instead of (SOFTWARE SECURITY UPGRADES). Capitalize all major words or use italics or boldface.

**Memo Text**

Unless you have reason for being indirect (see page 383), state your main point in the opening paragraph. Provide a context the recipient can recognize. (*As you requested in our January meeting, I am forwarding the results of our software security audit.*) For recipients unfamiliar with the topic, begin with a brief background paragraph.

**Headings**

When the memo covers multiple subtopics, include headings (as shown here). Headings (see page 311) help you organize and they help readers locate information quickly.

**Graphic Highlights**

To improve readability you might organize facts and figures in a table (see page 253) or in bulleted or numbered lists (see page 304).

**Paragraph and Line Spacing**

Do not indent a paragraph's first line. Single-space within paragraphs and double-space between.

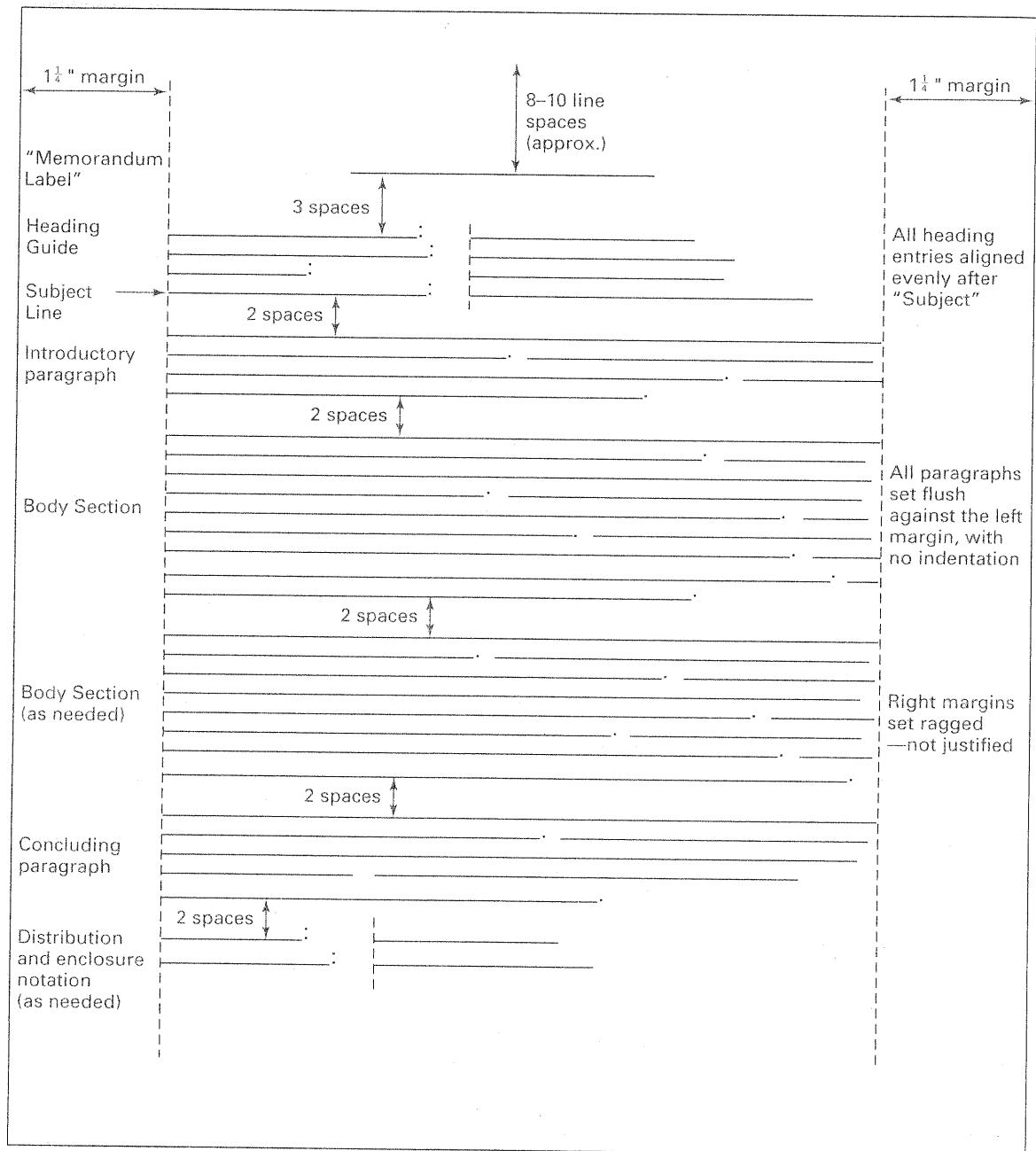
**Subsequent Page Header**

Be as brief as possible. If you must exceed one page, include a running head on each subsequent page, naming the recipient and date (*J. Baxter, 6/12/11, page 2*).

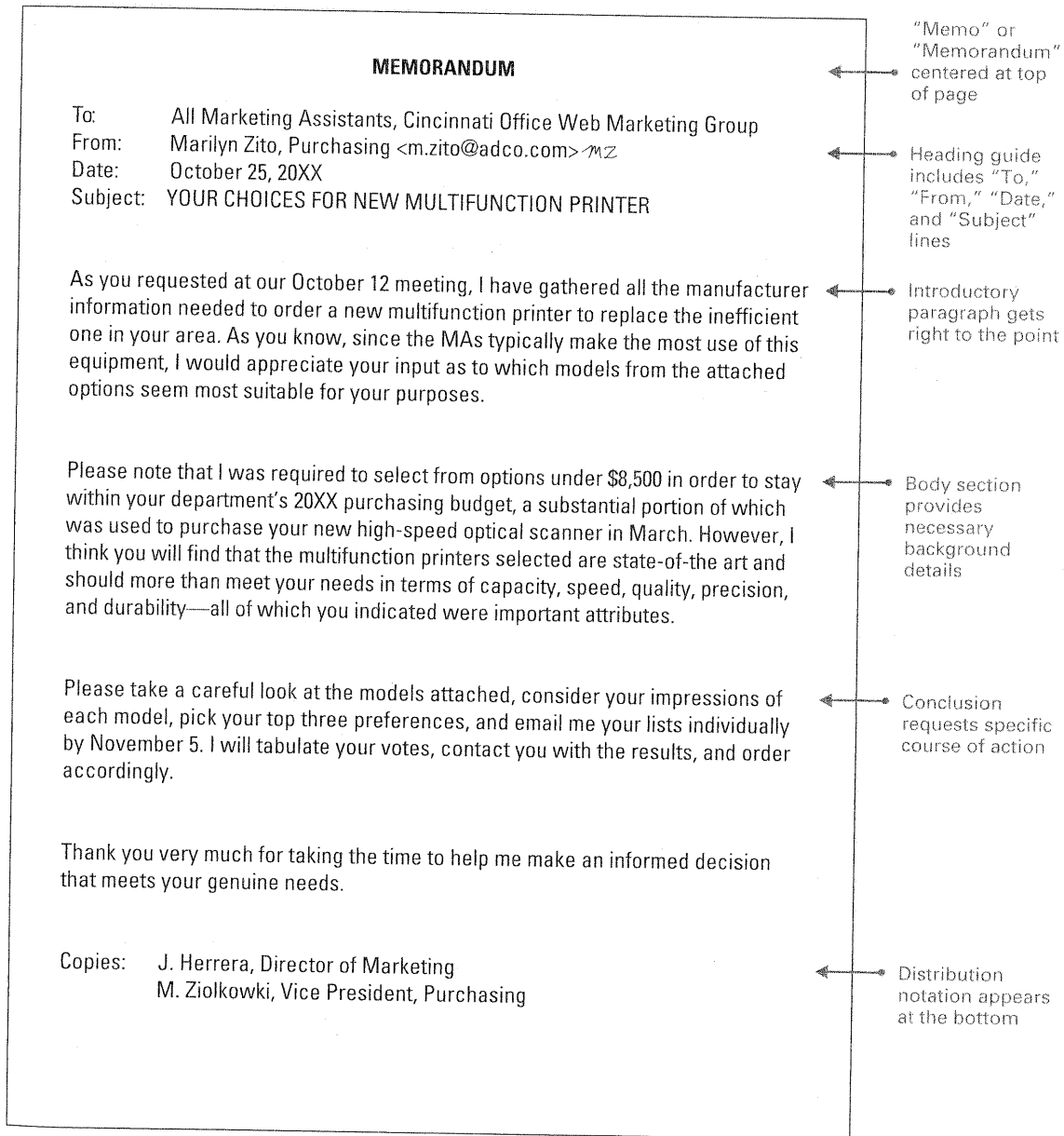
**Distribution and Enclosure Notations**

These items are illustrated under "Workplace Letters" (see page 376), and used in the same way with memos, as needed.

**FIGURE 15.1 Standard Parts of a Memo** These elements can differ across organizations and professions, but most paper memos look like this. Because memos are often read rapidly by a busy recipient, the various pieces of important information have to be in predictable locations.



**FIGURE 15.2 Standard Memo Format** Any internal headings would be set two line spaces below the preceding paragraph and one line space above the following paragraph.



**FIGURE 15.3 A Typical Memo** Note that the writer has initialed her memo (in the "From" line). Also she has provided a copy to each appropriate recipient—no one appreciates being left "out of the loop."

Achieving the right tone in your memos involves using some common sense. Put yourself in the shoes of your recipients and write accordingly. Be polite and avoid sounding bossy, condescending, and aggressive, or deferential and passive.



Being direct or indirect

Don't criticize, judge, or blame any individual or department. Don't resort to griping, complaining, and other negative commentary. Try to emphasize the positive. Finally, approach difficult situations reasonably. Instead of taking an extreme stance, or suggesting ideas that will never work, be practical and realistic.

The tone of a memo also comes across in the sequence in which you deliver the information. Depending on the sensitivity of your memo's subject matter, you may want to take a direct or an indirect approach. A direct approach (as in Figure 15.3), begins with the "bottom line" in the first sentence (as well as in the subject line) and then presents the details or analysis to support your case. An indirect approach lays out the details of the case over several sentences (and leaves the subject line vague) before delivering the bottom line later in the paragraph.

Readers generally prefer the direct approach because they want to know the bottom line without being told in advance how to feel about it. Assume, for example, that a company Payroll Manager has to announce to employees that their paychecks will be delayed by two days: This manager should take a direct approach, announcing the troubling news in both the subject line and the opening sentence and then explaining the causes of the problem:

Direct approach:  
Subject line  
announces main  
point

Opening  
paragraph starts  
with bottom line

#### MEMO

To: All employees  
From: Meredith Rocteau, Payroll Manager *MR*  
Date: May 19, 20XX  
Subject: DELAY IN PAYCHECKS

I regret to inform you that those employees paid by direct deposit will experience a two-day delay in receiving their paychecks.

This delay is due to a virus that infiltrated the primary computer server for our payroll system. Although we hired virus consultants to identify the virus and clean out the server, the process took nearly 48 hours.

We apologize for the inconvenience.

However, when you need to convey exceedingly bad news or make an unpopular request or recommendation (as in announcing a strict new policy or employee layoffs), you might consider an indirect approach; this way you can present your case and encourage readers to understand your position before announcing the unpopular bottom line. The danger of the indirect approach, though, is that you may come across as evasive.

Indirect approach:  
Subject line is not  
specific about the  
main point

#### MEMO

To: All employees  
From: J. Travis Southfield, Director of Human Resources *JTS*  
Date: September 19, 20XX  
Subject: DIFFICULT ECONOMIC TIMES

Each employee of the AutoWorld family is a valued member, and each of you has played an important role in our company's expansion over the past 10 years.

Yet as you all know, times are difficult right now for the automobile industry. Sales are down; financing is hard to obtain; and consumers are holding back on major purchases.

In order to keep the company solvent, we must consider all options. Therefore, I have been informed by our company president, John Creaswell, that we must downsize.

We will begin with options for retirement packages, but please be prepared for the possibility that layoffs may follow.

We will have more information for you at an all-hands meeting tomorrow.

Offers an explanation before delivering the bottom line

The bottom line

(For more on direct versus indirect organizing patterns, see page 383.)

Finally, a memo's tone comes across in the way you handle its distribution. Use the appropriate delivery medium. If your topic is very short, not overly formal, and needs to reach everyone quickly, consider sending the memo as an email or email attachment. But if your topic is more formal and more detailed, send out a traditional paper memo. Also, be careful about who receives copies. Don't copy everyone at work when the content is only appropriate for a few, and don't leave vital people off your distribution list.

Delivering memos in the right medium to the right people

## COMMON TYPES OF MEMOS

Memo format can also be used for distributing short, informal reports, discussed in Chapter 22. However, for the purposes of this introductory chapter, consider the following common and more basic types of memos.

### Transmittal Memo

A transmittal memo accompanies a package of materials, such as a long report, a manuscript, or a proposal. Its purpose is to signal that the information is being sent from one place to another (providing a paper trail), to introduce the material, and to describe what is enclosed. A transmittal memo may be as simple as a sentence or a paragraph with a bulleted list describing the contents of the package, as in Figure 15.4.

### Summary or Follow-up Memo

A summary or follow-up memo provides a written record of a meeting or conversation, or just a recap of a topic discussed that was not resolved at the time. In addition to providing evidence that the meeting or conversation took place, summary and follow-up memos also insure that each recipient has the same understanding of what was decided. Figure 15.5 shows a memo that performs both a summary and follow-up function.

### Routine Miscellaneous Memo

Routine miscellaneous memos cover a virtually infinite variety of topics. Such a memo, for example, may contain some type of announcement or update, for





## MEMORANDUM

To: D. Spring, Director of Human Resources  
From: M. Noll, Head, Biology Division, *M.N.*  
Date: January 16, 20XX  
Subject: HIRING OF NEW LABORATORY MANAGER

Introduction  
conveys the  
main point



As you know, each unit manager has been asked to prepare a hiring plan for the coming year. Attached to this memo please find a brief report justifying the biology division's need for a new laboratory manager.

Bullet list  
highlights  
major items



The attached report includes

- an overview of needs
- a job description
- a budget

Please let me know if you require any additional information. I look forward to hearing from you.

Enclosure  
notation names  
the document  
being transmitted



Enclosure: Justification report

**FIGURE 15.4 A Transmittal Memo** A memo like this would be placed atop a longer document.

example, announcing the closure of a parking ramp over the holidays for repair, or an upcoming awards ceremony on Friday. Other such memos may request information or action, reply to an inquiry, or describe a procedure. To save time and expense, these memos are increasingly sent via email. But if the memo has a more formal purpose, a traditional paper version may be preferable, as in Figure 15.6, which reiterates an important company benefit and encourages employee participation.

**Incredible Software  
and Graphics, Inc.****MEMO**

To: Elaine Lamer and Mitchell Dramson, Software Development Team  
From: Christopher Felts, Manager CFF  
Date: June 19, 20XX  
Subject: FOLLOW UP TO TODAY'S MEETING

Thank you for meeting today to discuss next steps to complete the updated version of our animation software package.

← Refers to the earlier meeting

As you noted, the original release date of October 1 is probably too optimistic given the latest hiring freeze. Yet, as I mentioned, we can't afford to go beyond a date of October 15 if we hope to make our fourth quarter sales goals. So, let's agree on October 15 as the new due date.

← Summarizes what was discussed

Please communicate this information to the other members of your team.

← Requests specific action

cc: E. Hearly, Division Chief

**FIGURE 15.5 A Summary or Follow-Up Memo** This type of memo provides a written record.

**M**orris and **S**utton, LLC

**MEMORANDUM**

To: All employees  
From: Jorge Gonsalves, Human Resources JG.  
Date: January 12, 20XX  
Subject: 401K MATCHING POLICY

Describes the  
benefit plan

As the new year begins, we in Human Resources would like to remind you about the company's generous 401K matching policy. We will match your 401K contributions 100% when you roll up to 10% of your salary into your 401K.

Encourages  
participation

Many companies will match only up to 5% of an employee's salary, and usually not at a 100% rate, so please take advantage of this program by enrolling now. Enrollment is only open until March 1st and will not be open again until next January.

Describes the  
procedure

Please drop by the Human Resources office on the 6th floor to get a handout that provides more detailed information or to speak with an HR representative in person.

Thanks.

cc: Alison Sheffield, Manager, Human Resources

**FIGURE 15.6 A Routine Miscellaneous Memo** This type of memo can cover a wide variety of topics.

**GUIDELINES** for Memos

- ▶ **Do not overuse or misuse memos.** Use email or the telephone when you need to ask a quick question or resolve a simple issue. For a sensitive topic, prefer a face-to-face conversation whenever possible.
- ▶ **Use memos for in-house purposes only.** When sending a message to a client, use email if the message is informal and a letter if the message is more formal.
- ▶ **Focus on one topic.** If you need to address more than one topic, consider a format other than a memo (for instance, a report).
- ▶ **Be brief but sufficiently informative.** Recipients expect memos that are short and to the point but not at the expense of clarity.
- ▶ **Be sure the tone of your memo is polite and respectful.** Don't make enemies by "sounding off."
- ▶ **Avoid sounding too formal or too informal for the topic or audience.** A memo to the person in the next cubicle to ask for help on a project, for example, would be more informal than a memo to a company executive.
- ▶ **Use the appropriate organizational sequence (direct or indirect).** Prefer the direct approach when you need people to get the point quickly, and the indirect approach when you have something difficult to say that needs to be softened.
- ▶ **Follow the standard format illustrated throughout this chapter.** Refer to Figures 15.1 and 15.2 for spacing, margins, alignment, and other elements. Keep in mind that some organizations may have their own formatting requirements for various documents.
- ▶ **Use white space, headings, and bullets, as needed.** These features provide visible structure to your memo, as well as "chunking" all elements into easily digestible parts.
- ▶ **Use tables, charts, and other visuals to display quantitative information and to achieve emphasis, as needed.** See, for example, Figure 15.7.
- ▶ **Check spelling, grammar, and style.** Run the spelling and grammar checkers, but also proofread or ask a colleague to proofread the memo.
- ▶ **Be sure to initial your memo.** Initials beside your typed name certify that you are the author.
- ▶ **Determine whether to use paper or email to send your memo.** Paper memos take longer to reach the reader but may convey a more serious purpose, whereas digital distribution (such as email) is quicker but may be overlooked by the reader.
- ▶ **Distribute to the right people.** Do not "spam" people with your memo. Whether you are sending the memo on paper or as an email attachment, be sure it reaches only those who need the information. At the same time, don't leave out anyone who needs to read your message.



## MEMO

To: Steve Bates, Director of Sales  
 From: Marcia Rogers, Sales Manager *M.R.*  
 Date: Feb. 1, 20XX  
 Subject: YEARLY SALES VOLUMES IN REGIONS 3, 5, 6

Steve, as I indicated at the meeting last week, Southwest sales continue to lag behind those in the Midwest and the Northwest. I still have no answer for the fourth quarter downturn. No doubt, the region's economic problems have caused everyone headaches, but we should be able to develop some new marketing strategies.

The Southwest region is diversifying quickly, and all economic indicators show slow but steady growth. A medical instrumentation industry such as ours should mirror that growth. But as the following chart illustrates, sales in the region have been erratic. We lost over \$150,000 in the last quarter alone.

Visual provides emphasis →

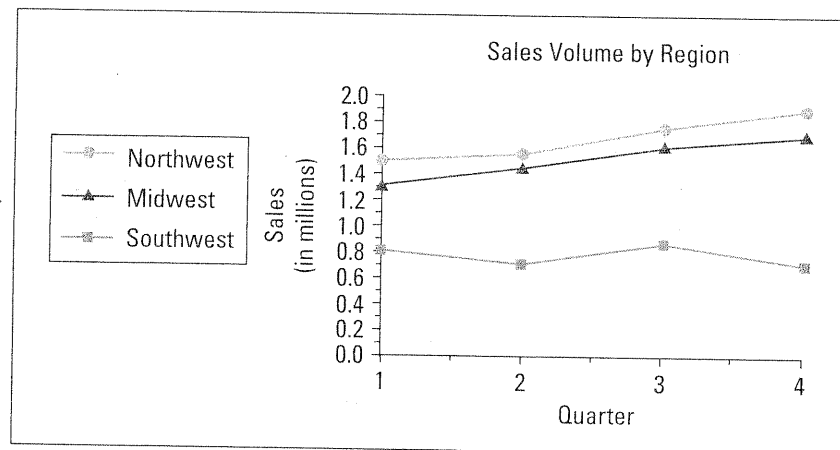


FIGURE 15.7 A Memo That Includes a Visual to Underscore a Point The line graph underscores and justifies the writer's concern about the company's unacceptable performance.



## CHECKLIST: Memos

(Numbers in parentheses refer to the first page of discussion.)

### Content

- ☐ Is the information based on careful research? (327)
- ☐ Is the message brief and to the point? (341)
- ☐ Are tables, charts, and other graphics used as needed? (351)
- ☐ Are recipients given enough information to make an *informed* decision? (341)
- ☐ Are the conclusions and recommendations clear? (342)

### Organization

- ☐ Is the important information in an area of emphasis? (342)
- ☐ Is the direct or indirect pattern used appropriately to present the memo's bottom line? (346)
- ☐ Is the material "chunked" into easily digestible parts? (206)

### Style

- ☐ Is the writing clear, concise, fluent, and exact? (214)
- ☐ Is the tone appropriate? (342)
- ☐ Has the memo been carefully proofread? (117)

### Format

- ☐ Does the memo have a complete heading? (342)
- ☐ Does the subject line announce the memo's content and purpose? (343)
- ☐ Are paragraphs single-spaced within and double-spaced between? (343)
- ☐ Do headings announce subtopics, as needed? (343)
- ☐ If more than one reader is receiving a copy, does the memo include a distribution notation (cc:) to identify other recipients? (343)

### Ethical, Legal, and Interpersonal Considerations

- ☐ Is the information specific, accurate, and unambiguous? (342)
- ☐ Does the medium (paper, fax, email, phone, in person) fit the situation? (347)
- ☐ Is the message inoffensive to all parties? (346)
- ☐ Are all appropriate parties receiving a copy? (347)



**Chapter  
quiz,  
Exercises, Web links,  
and Flashcards**  
(Go to *Student  
Resources* > Chapter 15)



**Memo Activities, Case  
studies, Model  
documents, and Quiz**  
(Go to *Technical  
Communication  
Documents*)