

LEARNING ABOUT MEMO WRITING

In this segment of the course, you'll learn how to write effective memos. Email messages are the modern incarnation or version of memos. Or put another way, email messages are electronic versions of the now old-fashioned memos. The reasons that I include memos in this course, in place of email messages, are these:

- Whether you learn to write a memo or an email is almost irrelevant, because memos and emails share **the same basic features**, with just a few minor exceptions.
- Because company employees typically write email messages much more often than any other type of documentation, it is important for you to gain knowledge and practice in how best to organize, format, and write parts of an email/memo. Later on, you can then **easily apply** the strategies you learn about memo writing to your email writing.
- I want you to learn, right away in this course, how to format all types of business documents (memos, emails, reports, proposals, websites, and so on), and it is much easier for you to learn how to format a memo created as a Word document than to learn how to format an email.
- For the sake of efficiency, I need to use D2L for all major assignments for this course – it would be very difficult for me to easily process (and provide written feedback on) 28-30 email messages for any major assignment for this course.

Maybe some of you have written memos before, but I'm pretty certain that all of you have written an email message by now. Even so, I'm assuming no knowledge whatsoever, so it's ok if you've never written a memo or an email before.

There are four main parts to a memo (or a lengthy email):

- (a) Reference information at the top
- (b) Purpose statement
- (c) The "body" of the memo
- (d) The closing of the memo

I'll go through each of these parts, one at a time. Turn first to the next page, which shows you the basic structure of a memo. If this seems oversimplistic to you, don't think I'm being condescending! Remember that I'm assuming no knowledge at all.

Memorandum

To:
From:
Date:
Re: What is this about?

(Purpose Statement) What is this about?
What is your purpose for writing this?
Why is it important for the reader to read this?
...or, How could the reader benefit from reading this?

Begin the “body” of the memo with a heading. It also helps to end your purpose statement with one or several of these conventions:
white space
a colon
the words “the following” or “as follows”

(Body) Include only details that are absolutely essential

Divide the “body” of the memo into sections with headings; Within each major section with a major heading, use other format devices (such as vertical lists or subsections with subheadings) to help readers locate particular details within sections, and read through the memo quickly

(Closing) It is conventional in the close of a memo to offer more help, suggest a meeting, or provide your phone number/email address and encourage questions

Be friendly and courteous – at the very least, say “Thank you.”

REFERENCE INFORMATION AT THE TOP OF A MEMO

The top of a memo often looks like this:

Memorandum

To:
From:
Date:
Re:

At the top, you might find the word “Memorandum,” but you don’t have to include that word. Some companies put their name/logo at the top. What you decide to put there all depends on where you work.

Along the left you’ll list, To, From, Date, and Re (or “Subject”). Next to those words, you indicate your target audience’s name and title, your own name and title, the date, and the subject line. Sometimes you’ll add “CC:” under “To: and list people who are receiving copies of the memo.

You can write your initials next to your name if you wish. Some people think doing this adds credibility/authenticity to your memo.

Including the date is important for purposes of filing and deciding on whether to read the document quickly or later on.

The subject line should consist of a brief phrase that indicates what the memo is all about. You should imagine at least two different audiences for this subject line: your target reader and an administrative assistant who needs to know the subject of the memo for filing purposes or for decisions about whether to rush this to the target reader (whether to give it top priority) or whether to delay giving your memo to the target reader.

Use either white space or a horizontal line to separate the top portion of the memo from the purpose statement.

PURPOSE STATEMENT

Begin your memo with a purpose statement. Do not include a heading. Also, do not sum up the main conclusion of the memo. Instead, just write a brief statement that (a) explains the topic and purpose of the memo, and (b) indicates how the reader would benefit from the information. Also, if you are responding to a reader’s

request, indicate that you are doing that (e.g., “As you requested,” “In response to your request”).

The purpose statement might be a single sentence or a full paragraph, but it always answers the question, why are you writing this memo? Your reader is wondering: **What is this memo about? Why are you writing this to me? Why should I care about this? How would I benefit from reading this?**

As you can see in the example of a memo on the next page, the reason that Pat Crecine wrote the memo was to inform everyone on campus about changes to the spring, 2002 academic calendar. It might seem obvious why it’s important for people to know about these changes, but Mr. Crecine decided to make it very clear to readers why they should care about this topic: “These changes will affect the end of the semester, the number of reading days for students, and when final examinations will be scheduled.” It’s likely that everyone who received that memo read it completely, because the purpose statement made it clear that these changes would affect everyone’s work schedule.

Notice how the subject line and the purpose statement in a memo both answer the question, “What is this about?” In the example of a memo on the next page, both contain the words, “Changes to the Spring, 2002 Academic Calendar.” Mr. Crecine doesn’t repeat this information in two spots because he thinks that his readers are stupid. Instead, it’s common practice to explain what the memo is about both in the subject line and in the purpose statement. Why? In the workplace, different kinds of readers tend to read different parts of a document. For memos, the administrative assistant is often the key reader of the subject line (for filing purposes), whereas the target reader of a memo often skips the subject line and just reads the purpose statement. In business writing, therefore, repetition can be useful, because it helps you make sure that all of your readers will see key information, somewhere in the document!

After your purpose statement, you should insert a section heading if the section is more than a paragraph or two in length; you can also use any of the following ways to separate your purpose statement from the “body” of the memo that will follow it:

- white space between the purpose statement and the “body”
- a colon after the last word in the purpose statement
- the words “the following” or “as follows” in the purpose statement

On the next page, a colon, the words “the following,” and white space are used.

**CARNEGIE MELLON UNIVERSITY
INTER-OFFICE CORRESPONDENCE**

TO: The CMU Campus Community

From: Pat Crecine, Vice President for Academic Affairs

Date: November 22, 2001

Subject: Changes to the Spring, 2002 Academic Calendar

The Educational Affairs Council has recommended several changes to the Spring, 2002 academic calendar. These changes will affect the end of the semester, the number of reading days for students, and when final examinations will be scheduled. They are an attempt to relieve some of the pressure on our students during the final examination period. I concur with these recommendations. Therefore, the following changes will be made to the Spring, 2002 academic calendar:

1. The last day of classes will be Friday, April 24.
2. There will be two reading days: Monday, April 27 and Wednesday, April 29
3. Final examinations will be scheduled on Tuesday, April 28; Thursday, April 30; Friday, May 1; and Monday through Wednesday, May 4-6.

These changes do not affect the Spring 2002 academic calendars of GSIA or SUPA.

I trust that this early notification of these changes will permit you to adjust your schedule accordingly.

THE BODY OF A MEMO

1. Detail Selection

What should you include in the “body” of your memo? Because most of your readers will be extremely busy, provide them just with key details that are absolutely essential to their knowledge of a topic. Think about what your readers probably want or need to know about your topic and include that information for sure. Don’t bother your readers with extraneous details on a topic that they don’t absolutely need to know. Those details can go in an attachment, be presented in a separate document, or remain unknown to your readers.

Consider these questions when deciding what information to include and what information to omit from your memo:

- Do my readers absolutely need to know about this fact or detail to make a decision, approve something, or do their job well?
- Do they need to know about this information to understand the topic?
- Do they need to know this information to be convinced or persuaded?

If the answer to any of these three questions is “yes,” include the information! If it’s “no,” don’t include the information in your memo.

2. Structure and Formatting

In business writing, your readers will almost always be very busy. They’ll be swamped with things to do and things to read. Writers need to give them a break by structuring their memos with a set of major sections with major headings. **Also, use** a lot of white space and other ways of arranging information so that readers can scan (not read – just scan or skim!) the memo and (a) locate particular items of interest to them within seconds, and (b) understand the contents within seconds.

Using format devices is a wonderful way to help out your readers. They don’t want to hunt and search for key facts or key information they need to do their jobs. They need to find information within seconds! They can’t read a memo quickly if it’s full of paragraphs with no headings/sections. They need your help to find particular points of interest to them within seconds. Look on the next page, which is an example of an unformatted set of instructions. Imagine that your reader is a diabetic and needs to find out, within seconds, how to inject herself with insulin. If she were to read that unformatted version, she might take so long to read through the set of instructions that she’ll lapse into a diabetic coma before finding out what she’s supposed to do.

Giving the IM Injection

First of all, the preparation for giving the injection must be carried out. This includes: selecting the correct medication, preparing the needle, and drawing the medication. In selecting the medication, it must be triple checked to ensure that the right medication and dosage is being given. This is done by checking the order against the medication card, against the label on the drug container. Have the needle ready to go in order to prevent fumbling with the needle and medication bottle when drawing up the medication. Make sure that the needle is tight to the syringe and that it is the right side. Freeing the plunger so that it will draw back and push forward easily is a good idea as it prevents fighting with it when it may be in an awkward position, like in the patient's leg. Drawing up the medication has several points that are important in avoiding contamination of the needle, or medication, and in ensuring that the right dosage is being given.

For ease of explanation I am assuming that the medication is in liquid form in a container with a rubber seal that is supposed to be the correct dosage.

Now look at the next page, which is a formatted set of instructions. Your target readers, diabetic people, would be able to find particular information **within seconds** – such as just how to draw up the medication – because the writer has used **sections and informative headings** to help readers locate important details right away. Look at the formatted set of instructions and make a list of the format devices you see in that example. Then check the page that follows the formatted set of instructions to see if your list matches mine.

GIVING THE INTRAMUSCULAR INJECTION

Selecting the Correct Medication and Dosage

CAUTION: Triple-check the physician's order against the medication card and the label on the medication container, to ensure that you administer the correct medication in precise dosage.

After selecting the correct medication and dosage, prepare your needle and syringe.

Preparing Your Needle and Syringe

1. Choose a twenty-six (26)-gauge needle and affix it tightly to the neck of your syringe.
2. Free the syringe plunger so it draws back and pushes forward easily, to avoid later difficulties when the needle is in the muscle.

With your needle and syringe prepared, you are ready to draw up the medication.

Drawing up the Medication

CAUTION: Use aseptic technique to avoid contamination of the needle and/or medication; recheck the correct dosage on the container label.

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FORMAT DEVICES

In the example on the previous page, I identified these format devices. How did you do?

Headings and sections

White space (between letters, words, sentences, and sections)

Indentation

Margins

Boldface

Underlining

All caps

Parentheses

Vertical numbered list

Here are *additional* format devices that you can consider using in your business documents:

Italics

Lists with bullets, dashes, asterisks, or other icons

Horizontal lines

Boxes around text

Graphics

Icons

Use of color

Use of shading

Now compare the memo on the top of the next page with the memo on the bottom of that page. The first version is unformatted and notice how hard it is to figure out what it means! The second version, which is formatted with a vertical list, is much easier to understand.

It is generally acknowledged that proper time charges have been thoroughly confused within the division. In an effort to reduce the amount of legwork incurred by designers within the unit, I have asked Mr. Walden to establish the responsibility of giving time charges for new projects to L. Harris. This has been agreed to; therefore, the Unit Secretary shall maintain an up-to-date time sheet concurred to by Harris of all charges, including overhead. Any unresolved questions should be referred to immediately to Harris.

To correct the improper making of time charges within the division, Mr. Walden has empowered Mr. Harris to:

- (a) see that time charges for new projects are made properly,
- (b) have the Unit Secretary maintain an up-to-date time sheet of all charges, including overhead, and
- (c) answer all related questions from personnel.

PARALLELISM

No memo should consist of just a set of vertical lists. In any memo that you write, begin each new section with a major heading followed by a brief overview. Then be selective – write a few sections with vertical lists that follow the brief overviews, but also, write some sections that are just brief paragraphs or that contain subsections with subheadings. Variety is important, and so is your opportunity to go into some description/explanation at times, which you probably can't do well in vertical lists alone. Maybe use a vertical list only when it makes sense to do so, because you would have just a handful of simple terms or phrases to present that you could list easily, but use paragraphs or subsections (with subheadings) when you are presenting more complex and detailed information that you could convey more effectively in full sentences than in vertical lists.

Whenever you do use a vertical or horizontal list, you should make sure that each item in your list has the same grammatical construction. This is called **parallelism**.

For example, each item in your list might begin with infinitive phrases, as in the following example:

I like to ski, to bike, and to drive.

Or, maybe each item in your list will begin with a gerund (ing) phrase, as follows:

I like skiing, biking, and driving.

Or, maybe each item in your list will be a full sentence. It's your choice! Just be sure that all items have the same grammatical construction.

PRACTICE

Try rewriting the following sentences to correct faulty parallelism. On the next page are the answers:

- (a) Eating is time-consuming, expensive, and it makes you fat.
- (b) The most dangerous forms of transportation are riding motorcycles, cars, and pedaling a bicycle.
- (c) He collected information from letters, newspapers, from diaries, and city records.
- (d) Different persons respond to different types of music, such as folk, rock, or they like to listen to blues.

Here are some possible versions. You might have come up with other versions that also have correct parallelism:

- (a) Eating is time-consuming, expensive, and fattening. (Each item is an adjective)
- (b) The most dangerous forms of transportation are motorcycles, cars, and bicycles. (Each item is a plural noun)
- (c) He collected information from letters, from newspapers, from diaries, and from city records. (Each item has the word "from" plus the plural noun).
- (d) Different persons respond to different types of music, such as folk, rock, or blues. (Each item is a noun, a type of music)