

Previous Lecture

- The 7 C's of Effective Communication
- Concreteness
- Correctness
- Consideration
- Courtesy

Memorandum



Latin: Bring to remembrance



Type of informal report



Used for communication within an organization

Memorandum



Basics

- Interoffice communication
- Without formal salutations and closing remarks
- Used as a covering note
- Cardinal Rule:
 - All important information must appear on the first page



Memorandum



Structure









- Less formal than a letter
- In case of no printed memo form, memo or interoffice correspondence at the center and top of the page
- Brief and simple (if long, send as an attachment)
- Direct information



Memorandum



Key Points

-   Avoid personal statements
-   Professional tone
-   Easy to understand language
-   Conciseness and clarity should go in line with adequate development of thought



Memorandum



✓ Purpose [1/2]

- Important to decide whether memo is the best medium for interaction compared with all other means
- Recording and relaying Information
 - Statement written by higher authorities for the purpose of sharing information
 - Meeting minutes
 - Due dates
- Persuasion (making brief appeals)
- Reaction/Feedback



Memorandum



Purpose [2/2]

- Builds good relationship
- Establishes accountability
- Motivates employees
- Issues a directive
- Provide a report



Memorandum



Effective Elements

- Grabs the reader's attention
- Provides information, makes a recommendation, or asks for action
- Explains benefits to reader
- Mentions next steps and deadlines
- May be used to explain author's opinion(s)



Memorandum



Audience Analysis

- Typical Audience:
 - Co-workers and colleagues → focus on the main point
- Separate department:
 - Less familiar → provide a detailed background
- Always good to provide a context



Memorandum



✓ Guidelines and Tips [1/2]

- Clear subject line
- State your **purpose** in the first paragraph
- **Summarize** any potential objections
- Keep paragraphs short
- Use **subheads** between paragraph groups
- Use **bulleted** and numbered **lists**
- Request **action**



Memorandum



Guidelines and Tips [2/2]

- Include as much information as necessary
- Be concise but convincing
- Include lists, charts and graphs at the end
 - Mention how these attachments are important



Memorandum



Types

- Information Memo
- Problem Solving Memo
- Persuasion Memo
- Internal Memo Proposal
- Directive Memo
- Response to an Inquiry Memo
- Trip Report Memo
- Field Report/Lab Report Memo



Memorandum



Types: Information Memo

- Used to deliver or request information or assistance
- First part provides main idea
- Second part expands on the details
- Third part outlines the action required

MEMO

TO: Finance Committee Members **DATE:** October 20, 2003
FROM: Ida Mae Knott **SUBJECT:** Bakery Bid Report

As agreed upon at the September 19th meeting of the Finance Committee, bids to outsource the bakery product needs of our new cafeteria were solicited from three area vendors. I have met with representatives from each and carefully examined their proposals.

Since it is company policy to avoid the lowest and highest bids, the revised operating budget and supplementary information attached to this memo is based on numbers furnished by the Golden Bread Company.

Included for your review and approval are the following items:

Golden Bread Co. Information

- Wholesale price sheets
- Quantity cost break formulas
- Delivery and other service charges
- Annual contract discount structure
- Annual contract and credit application

Accounting Department Information

- In house vs. outside contract comparison report
- Bakery product line-item expenditure worksheets
- Revised payroll/payroll burden worksheets
- Revised pro forma and annual cafeteria operating budget proposal

I have met with the Golden Bread Company's sales manager and their Vice President of Sales and Marketing and have been assured that that we will receive excellent service. It is my recommendation that we sign them to an annual contract. They are located here in Silver City and doing so will be in keeping with our established policy to support the local business community.

Should it be necessary, I will be available this afternoon during the regularly scheduled finance meeting and will be happy to sit in and answer any questions. My office extension is # 29.



Memorandum



Types: Problem Solving Memo

- Suggests a specific action to improve a situation
- First part states the problem
- Second part analyzes the problem
- Third part makes a recommendation
- When making a recommendation, include not only the positive details but also the drawbacks and diffuse them yourself

Date: March 15, 2004
To: Candice Millard
From: Larry Massin L.M.M.
Subject: SOLVING PROBLEM WITH E-MAIL

Candice, as you noted in your March 13 memo, we are having problems with our e-mail. Intranet correspondence has evinced the wrong tone, contained unnecessary spacing, and forced readers to scroll endlessly. Here are suggestions to correct these problems.

1. **Improving Tone**—Studies tell us that typing in all caps creates a negative tone, called *flaming*. For example, when one writes, TELL YOUR SUBORDINATES TO IMPROVE THEIR TONE IN E-MAIL, readers feel they are being shouted at. Please ask your colleagues to avoid typing in all capitals.
2. **Omitting Unneeded Spaces**—E-mail arrives looking as follows:
“Can you help us solve problems with odd spacing.
We can not seem to figure out why this is happening.”
This odd spacing is caused by the different sizes of monitors. We commonly use word wrap when writing memos and letters because all text will exist on an 8½ X 11 inch page. Such is not the case with e-mail. E-mail on a 12” monitor will look differently than e-mail on a 16” monitor. To avoid the problem of odd spacing caused by different monitor sizes, do not use word wrap. Instead, use a hard return at the end of each line, and limit your line length to approximately 60 characters.
3. **Avoiding Endless Scrolling**—A memo or letter follows the **WYSIWYG** factor. When we get an 8½ X 11 inch memo or letter, *What We See Is What We Get*. In contrast, e-mail screens are smaller. Readers are often forced to scroll for several screens. This is disconcerting. To avoid this problem, limit your e-mail to approximately 14 lines (one screen).

By using these techniques, Candice, your department’s e-mail will improve. Please e-mail my suggestions to your colleagues by today’s end-of-business. If I can answer other questions, just call ext. 3625.



Memorandum



✓ **Types: Persuasion Memo**

- Used to encourage the reader to undertake an action he or she doesn't have to take
- First part begins with an agreeable point
- Second part introduces the idea
- Third part states benefits to the reader
- Fourth part outlines the action required
- Final part ends with a call to action

To: Mary McGee, Alistair Warwranka, George Lipton
CC: Dorothy Barrie
From: The Boss
Date: June 1, 2006
Re: Need for New Memo Format

I've noticed that we don't seem to be able to communicate important changes, requirements and progress reports throughout the company as effectively as we should. I propose developing one consistent memo format, recognizable by all staff as the official means of communicating company directives.

While I know this seems like a simple solution, I believe it will cut down on needless e-mail, improve universal communication and allow the staff to save necessary information for later referral.

Please talk among yourselves to determine the proper points of memo writing and return the input to me by 12 noon. I will then send out a notice to the entire staff regarding the new memo format.

Thank you for your prompt attention to this.

Reference: <http://www.lupinworks.com/roche/pages/memos.php>



Memorandum



Types: Internal Memo Proposal

- Used to convey suggestions to senior management
- First part states reason for writing
- Second part outlines present situation and states writer's proposal
- Third part describes advantage(s)
- Fourth part mentions and diffuses disadvantage(s)
- Fifth part ends with a call to action

Memo

To: TCAC Working Group
From: David Schnur
Date: October 16, 2009
Re: Scoring Proposal for Homeless Assistance & Special Needs/SRO Projects (revised)

Issue: The operation and management of projects serving homeless and special needs households has unique characteristics, and expertise with more typical affordable housing developments does not convey expertise in the skills needed to run housing for these specialized populations. However, the current TCAC scoring criteria do not distinguish between affordable and supportive housing in awarding points for general partner and management experience (Sec. 10325(2)(a) and (b)).

Proposal: Develop a different GP and management company experience scoring methodology for projects applying as homeless assistance projects under the non-profit set-aside and under the special needs/SRO set-aside. This methodology should only consider the number of projects serving the specified population, and sponsors should document that the listed projects indeed serve that population.

The current scorings is as follows:

GP Experience	In service < 3 yrs	In service > 3 yrs
1-2 projects	1 pt	2 pts
3-6 projects	3 pts	4 pts
7 or more projects	5 pts	6 pts

Mgmt Experience	In service < 3 yrs	In service > 3 yrs
2-5 projects	0.5 pts	1 pt
6-10 projects	1.5 pts	2 pts
11 or more projects	2.5 pts	3 pts

For homeless assistance and special needs/SRO projects, the scoring methodology should sponsors to opt for an alternative method (similar to MHP-Supportive) that considers only projects serving a comparable population – “comparable” meaning another tax credit project serving homeless (for homeless assistance projects) or special needs/SRO (for that set-aside) populations. Given the more limited number of such projects in any organization’s portfolio, the required number of projects should be reduced as follows:

GP Experience	In service < 3 yrs	In service > 3 yrs
1 project	1 pt	2 pts
2 projects	3 pts	4 pts
3 or more projects	5 pts	6 pts



Memorandum



Types: Directive Memo

- States a policy or procedure you want the reader or co-worker to follow
- Length depends on space required for explanation
- Beginning: clear and concise statement of purpose
- **Example:** The purpose of this memo is to let all members of the ABC Department know that doughnuts will be provided every Friday morning at 9:00 AM.
- Purpose is followed by statements providing a rationale

To: Design Team #362

From: W.B. Working

Date: May 27, 1997

Subject: Project Schedule

As A result of yesterday's meeting, I suggest we follow the project schedule listed below. Remember, we must submit a proposal by noon on July 2.

Task	Completion Date
Divide research into groups and compile information	June 6
Review designs from Kate and Bill.	June 11
Write Proposal	June 23
Review Proposal	June 26
Submit Proposal for printing	June 27



Memorandum



Types: Response Memo

- To provide the audience with desired information.
- First part states purpose statement (to respond to a request)
- Second summarizes the requested information.
- Third part has a discussion, highlighting and emphasizing the important information
- Final part is call to action.
 - State the additional action to be taken to rightly address the issue

To: Design Team #362

From: W.B. Working

Date: May 27, 1997

Subject: Project Schedule

Purpose: This memo responds to your request that the weekly meeting be moved from 9am to 10am.

Summary: This request is satisfactory as long as it is approved by management.

Discussion: Management usually has no problem with the individual time changes in meetings, as long as meeting minutes are turned in by noon to Cathy.

Action: I have asked Cathy if she thinks this would be a problem and she said no, so all we need to do now is get approval from Steve.



Memorandum



Types: Trip Report Memo

- To a supervisor after an employee returns from a business venture
- First part has statement of purposes, i.e., provides information on trip
- Second summarizes clearly and concise (ideally!) outline of your trip
- Third part involves a discussion (highlight and emphasize important information)
- Final part includes action to be taken to rightly address the issue

To: Design Team #362

From: W.B. Working

Date: June 27, 1997

Subject: Weekly Meeting

Purpose: This memo presents my impressions of the meeting last week at ABC organization in XYZ country.

Summary: In general, I felt that the meeting went well and much progress was made.

Discussion: Barb and Jeff were able to make progress on the graphics and should have them finished next week. Kyle and Sandy are on chapter 2 of the user manual.

Recommendation: Kyle will meet with Jeff to see how they want the graphics integrated into the text.



Memorandum



Types: Field Report Memo

- To report on inspection and procedures
- It is divided into following parts:
 - Purpose
 - Summary
 - Problem
 - Method
 - Results
 - Conclusion
 - Recommendation

To: Dean of Journalism

From: Steve Nash

Date: June 27, 1999

Subject: Computer Lab

Purpose: This memo presents my the findings of my visit to the computer lab at Clark c252.

Summary: In general, I felt that the lab needs new equipment and renovation.

Problem: The inspection was designed to determine if the present equipment was adequate to provide graduate students with the technology needed to perform the tasks expected of them by their professors and thesis research.

Methods: I ran a series of tasks on SPSS and WordPerfect, and recorded memory capacity and processing time for each task.

Results: The inspection found that the hardware used to run the computers is outdated and that the computers themselves are very slow.

Conclusions: This lab is inadequate for the everyday needs of graduate students in this department.

Recommendations: Four new computers running on windows 10 and a processing speed of at least 2.0ghz with four cores should be purchased immediately.

Reference: <http://writing.colostate.edu/guides/documents/memo/pop2c.cfm>



Conclusions

- Basics of Memo
- Purpose of Memo
- Structure of Memo
- Types of Memo