



# How to Write A Memo

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## What is a Memo?

The purpose of a memo is very simple; it is to bring something to someone’s attention. Memos are most often used in business as quick and easy ways of communicating information.

## What’s Different about a Memo?

Practicality is at the heart of memo writing, so you will need to ensure that your memo stays simple and understandable. Unlike other forms of writing, such as research essays, where your audience is an instructor expecting a complex piece of writing, memos tend to have simple and concise language. In a memo, your audience is almost always in a workplace environment as opposed to a scholarly one. To be as practical as possible, memos do not use overly complicated writing.

They also consist of pared down content. Because the aim of a memo is to quickly bring something to someone’s attention, extraneous details are often left out and discussed in either a later memo or during in-person meetings.

## Formatting a Memo

Memos are often sent in e-mail format and differ only slightly from e-mails in format. E-mail format is a familiar structure, but the purpose of an e-mail memo is different than that of a general e-mail. The headings that are used in a hard copy memo won’t be present in the body of an e-mail as they are already automatically included in the structure at the top.

Whether on paper or electronic, the memo format is different from many other types of written work. Here are some basic tips that are widely used in memos (see also full page memo on final page of this document):

Headings at the top of your page will be

- To:
- From:
- Date:
- Subject:

(Date and Subject are sometimes switched around)

- **No salutation** (eg. Dear Mr. Edler) — simply use the title and name
- **Don’t indent** each paragraph; use block style paragraphs
- Can mention added **attachments** at the end if necessary

*Hard copy:* by writing “Attached: [name of attachment]” below the signing area and stapling or using a paper clip to attach the documents

*E-mail:* same process as above, but documents will be attached to the e-mail being sent

To: Daniel Edler, CEO  
From: Andrew Schroeder, CFO  
Date: June 5, 2015  
Subject: Third Quarter Report Findings

Mr. Daniel Edler,

I have recently completed our quarterly report for the third quarter and, with the help of the finance team, have done an in-depth analysis of it. We have found several points of interest that we'd like to discuss with you in the coming weeks.

Firstly, we've noted a 45% increase in our overall sales from the last quarter. This may seem fine, but consider that it is 12% lower than last year's third quarter. We have several ideas as to the reason for this drop, which we would like to discuss with you at a later date.

Secondly, we've noticed that our assets aren't being valued accurately. We are finding that we experience many losses on sales, and we've attributed that to an over-valuation of our capital assets. In particular, our transport vehicles have been sold markedly lower than our book value, suggesting that we are understating annual amortization.

Finally, on a positive note, we have noticed improved inventory costs. Our days of inventory held has been dropping recently, likely due to our recent efforts at improving our just-in-time inventory system. The management team and I have agreed that it would be in the company's best interest to have a meeting on these points within the next week. We've pinpointed next Tuesday from 1:30pm - 3:00pm as an ideal time. Please email us by the week's end to say if this works for you.

Please don't hesitate to let me know if you have any questions.

Andrew Schroeder  
Chief Financial Officer  
ESE Sporting Equipment

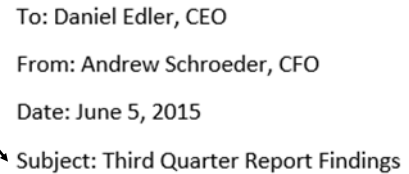
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## Tips for Writing a Memo

### Subject Line

Subject lines need to have a clear purpose. This may sound obvious, but too often the subjects of memos are uninformative and not useful to the recipient. A subject line like "Today" gives the recipient very little information as to the content of the memo. In contrast, writing "Quarterly financial meeting at 4pm today" as the subject will help the recipient know much more about the upcoming content of the memo.

Having a clear subject line can help ensure that the recipient understands the relevance of your memo and will actually take the time to read it.



To: Daniel Edler, CEO  
From: Andrew Schroeder, CFO  
Date: June 5, 2015  
Subject: Third Quarter Report Findings

### Revealing the Purpose

Because memos are meant to be quick and easy to read, reveal the aim of your memo early on. Don't wait until the end of your memo and risk frustrating your recipient, who could be confused as to the purpose of your memo. As with subject lines, the aim is be informative and clear. Make your purpose obvious early on so the recipient doesn't have to search for it.

### Language

Language in a memo should be kept simple. This may sound odd, as you might be used to having instructors encourage you to write for an educated, informed audience. The purpose of memos is to accurately communicate a message. Clear communication works much better with simple language, and therefore, simple language is used in memos. Note that "language" does not mean just word choice but also sentence structure complexity and grammar.

An example of overly complicated wording:

"Secondly, we, the finance team, have talked about how it seems that some of our assets (in particular our vehicles) haven't been valued in a way that is beneficial to our business. Most notably, some assets have been sold at marked losses and we suspect that a possible source of these losses could be an inaccurate valuation of said assets."

The above information could be expressed in a much simpler way:

"Secondly, we've noticed that our assets aren't being valued accurately and as a result are being sold at marked losses."

The second version is much clearer and easier for the recipient to understand. Some information might be left out, but that could be talked about in more detail in meetings or later memos.

## **Reader-centred, not self-centred**

Constantly remind yourself that you are writing this memo for your reader and not for yourself. Be sure to use reader-centred language that focuses the positives on the reader (unless the purpose of your memo is discipline, as in a poor performance review). Here is an example of self-centred wording:

"First, let me explain what happened. We are in the busiest time of the year, so we didn't have time to look at issues such as this one."

Now, take a look at the following example of reader-centred wording:

"First, let me explain what went wrong. It was nothing on your side; rather, it was our mistake that caused this issue."

## **Negative Information**

If you have negative information to convey to the reader, as you might in a performance review, be sure to put it in the middle of your memo, surrounded by more positive or neutral information. What the recipient reads first will form their initial impression, so you want to begin on a positive note. The last thing your recipient reads sticks in their mind, so positive information is effective at the end, too. Place negative information in the middle, as your recipient is more likely to receive the bad news well.

## **Call-to-action**

If you desire to have follow-up actions to your memo, a call-to-action will be applicable. A call-to-action is a phrase or sentence that draws the reader's attention to something that needs to be done. A common call-to-action is to set up a meeting in the future.

Note that your call-to-action should be specific, not general. General calls such as "We should have a meeting soon" are much less likely to be acted upon than specific ones, such as "We recommend setting up a meeting for next Friday morning to discuss these issues." Usually, calls-to-action are near the end of the memo, so as to ensure that they are fresh in the reader's mind, much like positive information. Note that if you don't desire any follow-up actions, a call-to-action isn't necessary.

**See next page for full-page annotated example of a memo.**

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## Sample Memo

To: Daniel Edler, CEO

Full name and Position Title

From: Andrew Schroeder, CFO

Date: June 5, 2015

Informative Subject

Subject: Third Quarter Report Findings

Mr. Daniel Edler,

No salutation, just title and name

I have recently completed our quarterly report for the third quarter and, with the help of the finance team, have done an in-depth analysis of it. We have found several points of interest that we'd like to discuss with you in the coming weeks.

Purpose established early

Firstly, we've noted a 45% increase in our overall sales from the last quarter. This may seem fine, but consider that it is 12% lower than last year's third quarter. We have several ideas as to the reason for this drop, which we would like to discuss with you at a later date.

Secondly, we've noticed that our assets aren't being valued accurately. We are finding that we experience many losses on sales, and we've attributed that to an over-valuation of our capital assets. In particular, our transport vehicles have been sold markedly lower than our book value, suggesting that we are understating annual amortization.

Negative information in the middle of the memo

Finally, on a positive note, we have noticed improved inventory costs. Our days of inventory held has been dropping recently, likely due to our recent efforts at improving our just-in-time inventory system.

End with positive information

The management team and I have agreed that it would be in the company's best interest to have a meeting on these points within the next week. We've pinpointed next Tuesday from 1:30pm – 3:00pm as an ideal time. Please email us by the week's end to say if this works for you.

Specific call-to-action

Please don't hesitate to let me know if you have any questions.

Andrew Schroeder

Chief Financial Officer

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