How to Write a Memo

To: [Recipient name]
From: [Sender name]
Subject: [Brief description of memo contents]
Date:
CC: [names of individuals copied on this memo]

This memo will give advice on how to improve the content and organization of your memos. First you organize your thoughts by making a short list of ideas to address. Second, use subheads that provide visual cues to your reader. Third keep your memos formal but simple.

Get immediately to the point of your memo. Remember that your audience is probably very busy, easily distracted, and in a hurry. Write your first paragraph as though the reader won’t be reading any further. Be sure that it includes your message in a nutshell.

Your memo should have four parts: the heading, introduction, body and conclusion. The heading should be organized in two columns, as shown above. The introduction refers to why this memo was drafted and briefly notes your findings or recommendations; usually in a bulleted list as well as the factors referred to when making these recommendations. Your introduction should not include a salutation, such as “Dear Mr. X.”

First Key Point: List Items to Cover

State the business task and three factors that you believe affect the decision making process. These points align with and give context for your recommendations, which you should state soon thereafter. For example, a memo recommending a particular investment might read, “We believe that investment vehicles for CALPERS $8.2 billion pension fund should take into account the investment horizon, investor risk-reward profile, and current portfolio composition.”

Second Key Point: Visual Cues

Keep your memo brief. Avoid repeating yourself, and don’t be long winded. If your memo is longer than a few paragraphs, organize the information into subtopics/headings. These subtopics/headings provide a visual cue to your readers. Retype your three supporting points and use them as your subheads and include breaks before and after these headings.

This presentation allows your readers to scan the information quickly. Your memo is like a resume and will receive only a quick glance. Zoom your document to 50% to see if you have established a good flow with the headings.
Third Key Point: Simplicity

Keep your sentences and paragraphs short to ease readability. Cut anything that does not support your main message and do not waste space summarizing commonly understood contextual information. Also use active voice.

The tone of memos can be formal or informal, depending on your relationship to your readers. However, a business-like tone is always best especially if you don’t want your message to be misunderstood or misinterpreted.

Closing

Your conclusion should echo your introduction and body. The conclusion should also present next steps, if applicable. The ending should not include a closing remark such as “Sincerely…” To sum up, a memo is a short but formal document that should quickly convey recommendations, rationale and implications to your audience. Organize your thoughts, use visual cues and keep it simple.

Keep it mind that your readers may not read all the way to the conclusion and to be aware of any vital information that is said at the end.

Attachments (optional)

Your memo may accompany materials, such as a report, an agenda, or a schedule. Use the abbreviation *encl.* and itemize the documents. For example:

encl.  Updated production schedule
Report of the Acquisitions Committee

This document is based on suggestions by James J. Owens, Assistant Professor of Clinical Management Communication, and Bangaly Kaba, M.B.A. 2009, both of the Marshall School of Business, University of Southern California.