



**The
Executive Agency
Training Program**

How To: Memos



Policy Memos

Why a Memo: Memos are designed to succinctly convey information, analysis and (sometimes) recommendations. You are writing a memo because the recipient does not have time to read a longer more thorough analysis (if there is time to read anything at all). Your memo is likely to be handed off as the recipient hurries to a meeting, stuffed into a briefcase at the end of a long day or skimmed while taking a phone call.

Writing Effective Memos: Effective memos get to the essence of the matter immediately. They are clearly written, vibrant, analytically coherent, organized and short. Make sure yours are the memos that get read and not the ones that accumulate in a “read when I have time” pile.

Types of Memos: There are numerous types of memos and styles in which they can be written. Some memos just provide *information* (information memos) and/or *analysis* (analytic memos); others also make *recommendations* (decision memos). Every institution has its own culture and each memo recipient has a memo style they prefer. Therefore, the advice here serves only as a launching point.

Memo Guidelines

Know Your Audience: You are writing for the benefit of the reader. Don't force them to think like you. Instead, think like them. Anticipate their questions, concerns and objections. Write at their level of expertise: don't waste space on well-known information or unnecessary technicalities. Do your research:

- What do they want/need from this memo?
- What do they already know?
- What are their attitudes toward the issue?
- What related issues do they care about?
- Are there themes, phrases or concepts that appeal to them?
- How do they like to receive information?

Use this knowledge to ensure that the content and presentation of your memo responds directly to their preferences, background and needs.

Point of View: Memos are signed documents; write in your own voice and use the first person singular (or plural if multiple authors) - "I" or "we." Address your audience using the second person – "you."

Memo Guidelines

Brevity: A memo should be no longer than necessary to convey the required info:

- Get to your point quickly - Cut out all material that isn't relevant and avoid overly elaborate analysis and temptations to show off.
- Keep it short - Do not force your readers to wade through long, verbose sentences; avoid repetition; and never use two words when one will do.
- Review and Cut - After writing the first draft, edit and cut. Eliminate redundancies and evaluate each word for its usefulness.

Clarity: Use clear, direct language and avoid vague generalizations. Use the active voice whenever possible. State the main idea of each paragraph within the first two sentences. Make it easy for the readers to get your main points. They need to know from the start why this particular memo demands attention. Make use of the style tips suggested later, they will improve your memo's clarity.

Balance: Providing balance and appearing unbiased will increase the credibility of your memo. Avoid slanting the assumptions or stacking the deck in favor of one recommendation. Move the reader toward a conclusion with evidence and analysis, not emotion or sleight-of-hand. Always fully present alternative views.

Memo Guidelines

Tone: Most memos are written for someone with decision-making power, by someone without it. Respect this difference in role, authority, and perspective. Do not use “we,” (referring to you and the recipient) as the subject of your sentences unless you are writing to those at an equal level as you. It may be useful to begin the memo by explicitly acknowledging the respective roles of you and the recipient, while also orienting others that may read the memo (ex. “you asked me to write this memo to help inform your decision on X”).

Expect Wider Circulation: Memos are often forwarded or leaked and thus receive wider distribution than intended.

- Though frankness is important, choose your words carefully. Imagine how they might appear in print.
- Avoid including personal comments, certain forms of humor or private observations that you would not want circulated.
- If necessary, write these things in a cover letter to allow the recipient to circulate your memo without them.

Structure

Though memos come in many different forms, most have these core components:

- Introduction
- Background
- Options (if deciding between various courses of action)
- Recommendation (with Analysis, Counterarguments & Action-Items)
- Conclusion

Introduction: Memos should not read like a mystery. The introduction should perform the function of an executive summary. Provide a roadmap to the whole, so the reader knows what is coming and in what order. Clearly state the issue under discussion, the central points that memo elaborates and any recommendations. Explain why the reader should be interested now.

First Sentence: Your first sentence is your most important. If it is boring or incoherent, no one will read on. Your first sentence must convince an audience with little time that your memo is a must read. Don't waste your first sentence telling your readers things they already know. Use it to persuade them that your memo is precisely what they need to know to solve a pressing problem.

Structure

Background: This section should provide relevant background and summarize the issue. Provide context – how does this issue relate to others? Specify and justify any assumptions that frame your argument (“Assuming X...”). Since your memo may be circulated, provide context so that the memo can stand on its own with readers who may not be aware of discussions that preceded it. But keep it short. Don’t insert all of the information you think your audience might need to know.

Options (If deciding between various courses of action): Present various options in a balanced, unbiased way. Who already supports which options? How do the options related to one another.

Recommendation: Offer your recommendation on the issue. Support your recommendation with analysis and justification, responses to anticipated counter-arguments and specific “next step” action items.

- **Analysis:** Analyze options according to a set of criteria: What are the pros and cons? What is feasible? What are the predictable outcomes? Describe the probabilities that the cost and benefits of various options will be realized. Support your assertions with facts, data, examples and logical arguments. Whenever possible, provide your reader with backup recommendations in case your preferred option is not attainable.

Structure

- **Counter arguments:** Consider and rebut counter-arguments. While you may not be able to refute all objections (some downside may be unavoidable), at least make the reader aware that they exist.
- **Action items:** Your recommendations must do more than simply say what should happen. You must offer a concrete guide to action specifying how the recommendation would be implemented (including the reader's own role). You should indicate the specific action that should be taken, how it will help to resolve an issue, who is responsible for taking action, what timetable should be followed, etc.

Conclusion: The conclusion should present a succinct summary of the major points and recommendations and remind the reader why the issue is important. Return to the problems and questions raised in the introduction. Do not introduce new evidence or arguments. Like your introduction, your conclusion should reflect your very best, most engaging writing.

Style Guide

Design Your Memo: Don't just write your memo - design it. Use its physical format to enhance the memo's readability. Allow the reader to scan it quickly, pull out key facts and grasp your core message. Make central points jump off the page. But don't go overboard. Keep the format simple and unobtrusive. If it is too confusing, you will only distract and discourage potential readers

Style Tools:

- Headings and Subheadings
- Bullet Points and Numbers
- **Bold**, *italics*, underlining key concepts

But, don't go overboard:

- Do not use too many of these devices at once
- Do not mix styles
- Do not bold, underline and italicize in the same line
- Do not highlight too many words
- Do not create too many subsections

Style Guide

Page Layout: Design your page to enable the reader to easily understand the memo's organization and key points.

- 12-point type or larger
- Short sentences
- Don't make paragraphs too dense.
- Avoid overwhelming pages with too much on them
- Parallel construction (see examples below)

Headings: Make the headings an integral part of your memo. Use them to help make your points more clearly. Although in drafting the memo, it may be helpful to use headings to identify sections – intro, background, analysis, etc. – change these to headings that emphasize your key points. Consider long headings that make your argument when they alone are read in series. Always use parallel construction – headings should be *all* full sentences or *all* short phrases; and sections under each heading should be of roughly comparable size and importance.

Style Guide

Bullet Points and Numbering: Bullets points and numbering are used to present concepts that are most usefully seen by your reader as a complete list. They make skimming your memo easier and allow readers to find the essential points. However, if you use them too much, they lose their value. Bullets can be a single word or up to two sentences. Always use parallel construction: each item in a list should have the same format, approximately the same length and be constructed the same way (ex. all questions; all begin with the subject or a verb).

Bold, Italics and Underlining: Emphasizing certain words by placing them in **bold** or *italic* typeface or by underlining them provides the reader another way to locate your key points quickly. But don't overdo it. Using one or two of these devices well is far better than using more without a clear delineation of the role that each plays. Always use parallel construction: highlight all similar points in the same way (don't switch back and forth), so that the reader quickly learns what kind of text to expect in bold or italics

Footnotes: Use footnotes for source citations only. Do not use them to describe minor arguments or supplementary evidence. If you want something read, put it in the body.