

Business Writing Strategies and Guidelines for Preparing Effective Memorandums

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ABSTRACT

Business employers commonly complain that new hires, especially recent college graduates, cannot write clearly and concisely and are not versed in standard grammar. To remedy this problem, this article offers writing strategies for teaching college students the basics of business document composition within introductory business communication courses. Teaching students how to prepare memorandums is the focus of this discussion. The article provides an overview of the most common types of business memos and offers business writing strategies and guidelines for preparing each memo type in a coherent, accurate, and concise manner. Throughout the article, sample memos are provided.

INTRODUCTION

As early as the 1990s, employers began to complain about deficiencies in business graduates' writing skills (Waner, 1995). Over the years, business schools have responded to workplace writing concerns by incorporating writing assignments and assessments at both the undergraduate (Knight, 1999a; Sharp & Brumberger, 2013) and graduate levels (Knight, 1999b; May, Thompson, & Hebblethwaite, 2012). In addition, business communication instructors have reported the implementation of a wide range of instructional approaches to remedy these writing problems. For example, some instructors have resorted to writing interventions that provide students with strategies for identifying and self-correcting ungrammatical sentences in their writing (Quible, 2006; author, XXXX; Stout & DaCrema, 2004). Other instructors have used scenarios, simulations, and/or authentic cases to increase student motivation and expose them to the kind of clients and business texts they will encounter in the workplace (Addams et al., 2010; Parsons & Lepkowska-White, 2009). Yet, such approaches have mostly focused on grammatical or content accuracy (i.e., *what* to write) rather than on teaching students *how* to prepare business documents.

Furthermore, some business schools have established comprehensive writing programs, such as writing across the curriculum (WAC) or writing in the disciplines (WID) (Dana, Hancock, & Phillips, 2011). These programs require students to apply the writing skills learned in one course to other classes, including some in disciplines unrelated to business communication. In practice, however, WAC/WID programs have met with mixed results (Nicolas & Annous, 2013; Plutsky & Wilson, 2001). Recommendations to improve these programs include the incorporation and development of team-teaching practices, business writing training opportunities for business faculty, and common goals and standards for writing and assessment

across courses (Plutsky & Wilson, 2001). Unfortunately, such improvements are difficult to implement successfully because they require increased faculty preparation-time and school-wide support and engagement. Despite business instructors' efforts, concerns about deficiencies in college graduates' writing skills continue to appear in both the academic literature (Jaschik, 2015; Lentz, 2013; Riley & Simons, 2013) and in mass market business-oriented newspapers and magazines (Holland, 2013; Middleton, 2011; Wastler, 2013). Moreover, a recent survey (AACU, 2013) of 328 employers at private sector and nonprofit organizations revealed that college graduates are not well-prepared for the workplace. The surveyed employers underscored the need for more emphasis at the college level on active skills, such as critical thinking, complex problem-solving, oral and written communication, and applying knowledge to real-world settings.

This article proposes the implementation of an approach that combines strategy instruction and business document preparation within introductory business communication courses. This approach is based on the premise that students need to learn *how-to* writing strategies to perform their jobs appropriately and efficiently. Simply stated, many students enrolled in business communication courses lack basic document literacy—'the knowledge and skills needed to perform document tasks' (NAAL, 2003). The Common Core State Standards for English Language Arts and Literacy and the College and Career Readiness Anchor Standards for Writing #4 (CCSS & NGA Center, 2010) asserts that to be career-ready writers, 'students must produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.' Specifically, the U.S. Department of Education's Teaching Excellence in Adult Literacy (TEAL) Center report (2011) recommends the application of writing strategies and model writing; that is, 'the study of written models with direct, guided practice' and the 'explicit study of formats, styles, tones, vocabularies, sentence structures, etc.' especially for those 'not familiar with different types of written genres' (10). We contend that this combined strategy and model-based method of instruction would better prepare college graduates for entering the workforce because a significant part of their daily work will entail writing professional looking documents for a variety of purposes.

Even though most business communication course instructors assign work that requires students to use one or more of the conventional document formats, the *how-to* component of document preparation is not generally a part of class instruction. Instead, instructors often assume students acquired basic knowledge about preparing business documents as part of their high school curricula. For students who took certain types of electives in high school—courses such as Keyboarding, Word Processing, Business Principles, Technical Writing—this assumption is probably valid. But because these courses are all electives, many students in introductory business communication courses lack this background knowledge. In addition, when students in business communication classes ask questions about preparing particular types of documents, instructors generally refer them to the samples included in the Appendices of their textbooks. Unfortunately, this material is marginalized by its very placement in the textbooks' reference sections, which generally devote no more than a few pages to each type of document (see, e.g., Beebe & Mottet, 2013; Bovee & Thill, 2016; Guffey & Loewy 2013; Newman, 2015; Shwom & Snyder, 2014). For these reasons, when supervisors ask new hires to handle a particular task, the individuals often lack the basic document literacy needed just to select the appropriate type of document for the task. More importantly, because these new hires are not familiar with the required rhetorical conventions of the various formats, they often prepare functionally flawed or unprofessional looking documents. As Young (2000, p. 1) states, employers are concerned that allowing staff members to send clients 'documents that look as if they were generated by a careless amateur' will compromise the organization's professional image.

This article identifies the strategies and guidelines that students need to write one type of business document: the memorandum. We chose to focus on the memo because, according to Lamb (2011), this 'informal written communication' remains 'the lifeblood of any organization.' She contends that 'careers are made and broken on memo writing power or the lack of it' (p. 170). Memos remain popular because they 'can reach large numbers of readers, and they provide a written record for senders and receivers' (Waldeck, Kearney, & Plax 2013, p. 293). The article provides an overview of the most common types of business memos and offers strategies and guidelines for writing each memo type in a coherent, accurate, and concise manner. Throughout the article, sample memos are provided.

MEMO TYPES

Memos are often classified according to their use, format, and purpose.

Uses

While most memos are generated for internal use, the meaning of internal here is broad, ranging from the interoffice messages of a company housed in one or more office buildings to a multinational corporation that uses these documents to communicate with its office locations around the world. In addition to being the most commonly used form of internal communication in most organizations, memos are also an acceptable form of external communication between organizations and trusted external contacts, such as consultants, lawyers, accountants, or advertising executives. For example, public relations and advertising agencies often use a Client Memo when they communicate with client organizations so they can record decisions and supply information for accounting purposes (Lamb, 2011). Other firms use external memos for routine business-to-business or business-to-client correspondence.

Paper-Based vs. Electronic Formats

The transmission method for memos varies—it may be done via e-mail, an intranet, or an in-house distribution system. Due to technological advances and the rise in the number of off-site employees, memos sent electronically are now the norm for everyday informal messages (Cavanor, 2016). In a comparative analysis of academic vs. commercial email messages, Gains (1999) found that although it is common to find features of conversational discourse in academic email messages, commercial email memos appear to follow the formal register and stylistic conventions for standard written business English memos. As Gains argues, it is perhaps because of the legal nature of business transactions, the function of memos as permanent records of a company, and the fact that initiated business memos are rarely responded to in writing those commercial electronic memos retain the graphical layout of paper-based memos. That is, they have the formal register and format characteristics (e.g., subject headings, openings, closings, and topic reference) of paper-based memos and do not exhibit any of the discourse features characteristic of other types of email correspondence, including business email letters.

Despite the prevalence of electronic forms of communication, most companies still rely on paper-based memos for certain purposes. The ease of transmission considered an advantage of e-mail based documents raises concerns in businesses that recipients may forward sensitive or confidential electronically-transmitted documents to unauthorized parties. Thus, when creating a paper trail proves desirable, whether for legal reasons or to meet recordkeeping requirements, companies often elect to send out or post paper-based memos. Also, because clients and employees receive hard copy memos so infrequently, they tend to view them as more formal and potentially more important than electronic transmissions. Finally, some communicators use paper-based memos because they fear recipients may not bother to open or read all their e-mail documents. This same concern also motivates many organizations to send out hard copy memos for high priority and urgent messages.

Purposes

Documentary/For the File Memo

This type of memo functions as a historical record for firms. For example, documentary memos record certain agreements or transactions, or track the progress of a certain project over time (Figure 1). Because documentary memos serve firms' practical record keeping needs, they ranked early on as one of the most commonly used types (Yates, 1989).

FIGURE 1 EXAMPLE OF A DOCUMENTARY MEMO

MEMORANDUM	
TO:	File
FROM:	James L. Smith ^{JLS}

DATE: March 2, 2014
SUBJECT: Agreement with Zane Financial to Manage Ajax Industries' Retirement Accounts

On March 1, 2014, the Board of Directors of Ajax Industries subcontracted with Zane Financial to manage Ajax's employee retirement accounts, effective January 1, 2015. As Ajax's contractor, Zane agrees to supply our employees with quarterly reporting statements about the performance of their retirement accounts.

Details of Ajax's Agreement with Zane Financial

Ajax will continue to provide financing for the accounts on a monthly basis at a rate of 8% of its employees' total salaries. Employees will make monthly contributions of 3.6% through payroll deduction. At the end of each month, Ajax will send Zane both the firm's payment and the employee contributions so that Zane can invest the funds on behalf of the Ajax employee retirement accounts.

Explanation of Ajax's Discretionary Rights

Zane has agreed to send Ajax quarterly reports about the performance of the retirement accounts. Although employees determine the allocation of their accounts among stocks, bonds, and cash equivalents, the firm reserves the right to alter the specific mix of stocks and bonds that make up the retirement accounts. Ajax requires this type of discretionary control due to the possible concerns of its Board of Directors about market conditions during a given time period and potential conflicts of interest that might arise due to any of Ajax's new or current business relationships.

cc: Board of Directors

Informational Memo

An informational memo communicates one or more simple pieces of new or updated information to its readers, or requests some basic information from them (Connor, 2012). One common type is a simple announcement (Figure 2). A memo about the firm's dress code, such as a change to casual Fridays, would fall into this category. Readers expect these communications to be succinct, so writers generally strive for brevity when conveying these types of messages. However, some informational memos can be a bit lengthier. If the topic of these longer memos requires significant explanation, the writer should outline the most important details in the first few paragraphs.

FIGURE 2 EXAMPLE OF AN INFORMATIONAL MEMO

MEMORANDUM	
TO:	All Staff
FROM:	Madeleine Brinkman, ^{MB} Human Resources Director
DATE:	July 6, 2013
SUBJECT:	Announcement of New Educational Benefit Available to Staff
<hr/>	
Effective August 31, 2013, all staff will be eligible for reimbursement of tuition expenses leading to a college or advanced degree in any field or course of study that results in a certificate of completion.	
Following are specific details about the new educational benefit:	
<ul style="list-style-type: none">• Coursework does not have to be job-related.• Student fees and textbook costs are not eligible for reimbursement unless the coursework is clearly job-related or mandated by an employee's supervisor.	

For more complete details about this new benefit, please read the enclosed Educational Benefit Policy.

To ensure your eligibility for this benefit, please stop by Human Resources (HR) and complete the required Request for Educational Benefits Application form. You will also need to provide HR with proof of admission to the relevant educational institution or program.

If you have any questions about this new benefit, please contact Lena Jones at x6094 or via email at ljones@bzcom.org

Enclosure: Educational Benefit Policy

Problem-Solving Memo

This type of memo generally offers suggestions for a way(s) to address a particular problem or situation. The writer might convey ideas to management that would cut costs, increase profits or help avoid an anticipated future concern or problem. For a problem-solving memo to be effective, the writer must show the recipients that the proposed action will benefit them or the firm in some way. For example, in the sample problem-solving memo included in Figures 3 and 4, a Director of Manufacturing notes that sales of a particular product line are approaching production capacity. This manager suggests possible ways to increase production, such as replacing or updating machinery, or adding another work shift. In a problemsolving memo like the one just described, the writer will generally arrange the suggestions in rank order from strongest to weakest, with an evaluation of the advantages and disadvantages related to each suggestion followed by a weighted recommendation that takes each side into account.

FIGURE 3 EXAMPLE OF A PROBLEM SOLVING MEMO (PAGE 1)

MEMORANDUM	
TO:	Jacob Blankley, Executive Director Martin Cheston, Director, Finance & Accounting Ellis White, Director, Human Resources
FROM:	Sandra Chisholm ^{SC} , Director, Manufacturing
DATE:	November 8, 2013
SUBJECT:	Anticipated Problems Fulfilling Orders for the Multiuse Landscaping Tool
<hr/>	
<p>As our recent quarterly sales reports show, we are fast approaching production capacity in fulfilling orders for our newest product, the Multiuse Landscaping Tool (Item #879243). Sales of this product have been excellent and recent trends indicate that sales will continue to increase at a rate of 10-15% annually for the next few years. As you know, we have only been marketing the new tool on a limited regional basis to certain types of businesses, so we have barely tapped the product's national sales potential.</p>	
<p><u>Considering Our Problem</u></p>	
<p>For the reasons outlined above, we need to figure out a way to solve this anticipated production shortfall. Following are three options I view as possible solutions. After I discuss these options and evaluate the pros and cons of each, I will recommend the option(s) I think we should pursue.</p>	
<p><u>Three Possible Options</u></p>	
<p>Basically, we have three feasible options for improving our production capacity:</p>	
<ul style="list-style-type: none">• Upgrading our current manufacturing equipment;• Replacing our current manufacturing equipment; or• Adding an extra shift to our current manufacturing schedule.	

Evaluation of Proposed Solutions

Upgrading our Equipment - Our current equipment is ten years old, so it is no longer considered technologically state-of-the-art. Upgrading the equipment is possible and the cost is not prohibitive, totaling approximately \$589,000. An equipment upgrade would yield a significant 33-35% improvement in our daily production capacity; however, we would have to keep the age of the current equipment in mind and project its remaining life (approximately 10 years) when we consider this cost.

Replacing our Equipment - New equipment would cost \$1.2 million and it would yield a 50% improvement in our daily production capacity, or approximately 1.5 times the improvement we would see with upgraded equipment. If we take the age of our current equipment into account, we can expect about ten more years of service from it. If we weigh that expectation against the significantly longer work life for the new equipment (20 years or more), plus add in the value of the increased depreciation costs we would be able to allocate on our taxes over the next 10 years, it seems clear that purchasing new equipment makes somewhat better sense long-term than an equipment upgrade.

FIGURE 4 EXAMPLE OF A PROBLEM SOLVING MEMO (PAGE 2)

J. Blankley, M. Cheston, E. White Format Note: Example of a Subsequent Page Header
November 8, 2012
Page Two

Adding a Third Work Shift - Adding a third shift to our current manufacturing schedule would enable us to increase production significantly by about 50% daily; however, it would mean that we would have to keep the factory open an additional eight hours, and bear significant increases in staffing and utility costs. In addition, the extra operational hours would expose our ten-year old equipment to increased wear and tear. This proposed solution would help us handle our anticipated production problem during the short to intermediate term. However, over time, these extra work hours would decrease the expected life of our current equipment just as high mileage on a car results in a shorter service life. Therefore, if we choose this third option, we would most likely need to purchase new equipment within the next 5-10 years.

Recommended Action

Based on the options outlined above, I recommend that we purchase new equipment. However, if upgrading our current equipment seems better to you based on factors such as the current cost of capital, other plans for capital outlay during this time period, etc., I would support that choice. Before we make a final decision between these two options, we should bring in a representative from the equipment's manufacturer to outline the relevant considerations for each of them. For example, the manufacturer is currently offering an attractive financing package for new purchases. Other factors, such as the financing rate, could also impact our final decision.

Persuasive Memo

The writer of a persuasive memo needs to get the readers interested before requesting that the recipients take any action. The readers of a persuasive memo have discretionary power, so they may or may not agree to take action. A persuasive memo (Figure 5) should therefore outline an idea and explain that, if pursued, it would have benefits for the readers—that is, give the readers motives to comply. The writer also has to anticipate any potential objections the audience may have and defuse any possible concerns before asking for any audience cooperation or help. Only after anticipating such objections or concerns should the writer indicate the action(s) he/she needs the readers to take and end with a call to action.

FIGURE 5 EXAMPLE OF A PERSUASIVE MEMO

MEMORANDUM
TO: Mary Brinkley, Tom Croydon, and Alex Davis FROM: Debra Wyeth ^{DW} , Contracts Manager DATE: April 3, 2014 SUBJECT: Staff Assigned to Work on Bid for Cloverfield Mall Construction Project
<hr/> <p>As mentioned in our staff meeting yesterday, work on preparing the bid for the proposed Cloverfield Mall Construction Project has consistently lagged behind our planning timeline. Although that timeline was provisional, the current staff's difficulty in meeting the scheduled work goals, despite its best efforts, indicates that we need to allocate more employees to work on this proposed bid. The size and scope of the project and the volume of information needed to prepare the bid necessitate a staff of more than six people, many of whom also have work to complete for other ongoing projects.</p> <p>I propose the addition of two more staff members to the team as follows:</p> <ul style="list-style-type: none">• One additional architect who would specialize in preparing project bids, but would also assist the team in evaluating questions related to the blueprints and other building-related matters.• One contracts manager who would research and price the cost of various project materials and staffing that have not yet been determined. <p>With the addition of these two members to the team, I am certain we will be able to meet future timeline goals so that we will have a well-prepared bid to submit at the Cloverfield Mall Construction Project Meeting scheduled for August 31, 2014. If you have any questions about this proposal, please contact me at x6987 or dwyeth@constructaco.com</p>

Directive/Instructional Memo

The writer of an instructional memo informs readers about a procedure they must follow or an action they must take. The writer expects the recipients to act as requested or undertake the specific project or task as assigned. An instructional memo (Figure 6) reads both like an order and a set of detailed instructions related to a particular work action plan. The writer is not requesting cooperation; he/she expects it, so the memo must include all the information the recipients need to comply: who issued the request and when as well as what the recipients have been asked to do, where and why (Connor, 2012).

FIGURE 6 EXAMPLE OF A DIRECTIVE/INSTRUCTIONAL MEMO

MEMORANDUM
TO: All Staff FROM: Bradley Franklin, ^{BF} Director of Accounting DATE: November 20, 2013 SUBJECT: Change in Deadlines for Business Travel Reimbursement
<hr/> <p>Effective this Friday, staff members must submit all requests for travel expense reimbursement within 30 days of the completion of their trips. The firm has mandated this policy change in order to comply with new IRS regulations that require timely reimbursement of business travel expenses.</p> <p>As always, staff must submit receipts and proof of payment for all expenses exceeding \$25.00 unless the receipt indicates a cash payment. Copies of credit card statements showing the relevant charges or proof of payment from a checking account are acceptable as proof of payment.</p>

Please contact me at x7267 with any questions about this change. For general questions about reimbursements for travel expenses, please contact Joe Smith at x4589.

GUIDELINES AND STRATEGIES FOR WRITING MEMOS

Planning a Memo

When planning a memo, writers should consider four fundamental things: audience, language, content, and context for the message. First, writers need to determine the composition of their audience. They should figure out if they are writing to one person, several people or a group of people, and determine if they have previously communicated with any audience member(s). They should also consider factors such as the audience's interest in and knowledge of the topic of the memo. Additionally, writers ought to determine if their audience has some type of personal, professional or financial interest in the information they will discuss. If the information to be presented is of a technical nature, they should assess whether the audience is likely to be composed of sophisticated or unsophisticated individuals from the relevant discipline. As advised by Fitzgerald (2005, p. 2), 'nontechnical readers may need a terminology key' and 'people unfamiliar with a project, might dictate adding a background section.' Second, writers need to tailor their language—what they say (content) and how they say it (tone)—to the relevant audience. They should keep in mind any potentially sensitive issues that may impact what they say and, if their message will be read or heard by second language learners, they should be careful about their word choice, use of colloquial phrases, and color selection for visuals. Memos are most effective when writers present details in an uncomplicated manner, and avoid jargon (Connor, 2012; Fitzgerald, 2005). Ambiguous language and abstract terms should also be kept to a minimum. Third, writers should map the content of their memos indicating, for example, the major and minor points they will cover; headings they might use to divide material into sections; and any attachments or visuals they will employ to validate their points. Jotting down notes or preparing an outline may be helpful for organizing the memo as well as for later developing the notes and outlines into a memo document. Finally, writers need to provide a context and purpose for the message they are conveying—why they are communicating about a particular topic or asking the audience for help.

Determining the Content of Each Memo Component

Introduction and Conclusion

Depending on their audience and purpose, memos—such as the documentary (Figure 1) or informational (Figure 2) types—may be fairly brief, ranging from a few lines to one page. When used for more detailed purposes, such as reports, memos may run as long as four or five pages. Very short memos do not usually contain formal introductory and concluding paragraphs; instead, they tend to provide a reminder of the context for the information that follows (e.g., '*As we all agreed at the meeting yesterday*'). Except for very brief memos that focus on one very simple idea, such as a confirmation of an arranged meeting, assume all memos should include at least a brief introduction and conclusion.

Introductions usually start with a purpose statement related to the subject line. When the reader is likely to be unfamiliar with the subject or background of a problem, writers should provide a summary or introductory background paragraph (generally appropriate for longer documents or for documentary memos). Additionally, the introductory paragraph should outline the memo's main points and provide a roadmap to its overall organization. This structure helps orient readers to the points addressed in the body of the memo. Furthermore, the topic generally dictates the format of a memo's introductory paragraph. For example, the introduction of a problem-solving memo should include a statement of purpose and an indication that the writer will discuss potential ways the company could solve the problem and will provide recommendations later in the memo. Writers should not preview their specific recommendations in the introduction; instead, they should signal that they will specify the actions they recommend after they analyze the various alternatives available to the company. Within the introductory paragraph, it is best to maintain a consistent voice. To lend a less formal, more personal tone, writers should use the personal voice (e.g., '*In*

this memo, I/we...). To maintain a more formal tone, writers should adopt an impersonal voice (e.g., *'The memo will...'*). For most internal memos, the personal, less formal tone is appropriate.

The conclusion in brief memos should only run about one paragraph. For problem-solving or persuasive memos, writers should provide one or two summary sentences that incorporate their recommendations in a future-oriented way (e.g., *'If the company implements my recommendations, it should be able to avoid any potential production capacity problems.'*). If the recommended action is timesensitive, a deadline should be indicated. Finally, in case follow-up is necessary, writers should offer readers their contact information when their letterhead does not include it. Conclusions for longer documents should provide some combination of summary, recommendation(s), action plan, and contact information. Longer conclusions should explicitly state the next step(s) the writer wants the reader to take and the deadline for action (if any) so the reader can act on the request as specified in the memo.

Body

The body of the memo should follow the method of organization outlined in the introductory paragraph. To help readers navigate through the document, writers should provide subject headings. As Oliu, Brusaw, & Alred (2007) point out, subject headings 'divide material into manageable segments,' draw the reader's 'attention to main topics,' and 'signal a shift in topic' (p. 287). Headings should be inclusive enough to cover all the information until the next heading. In this way, subject headings provide readers several entry points into a memo and allow them to skip sections and begin looking at segments other than the introduction. In short, their purpose is to enable readers to scan the document and locate information quickly. Above all, the main points in the body should flow logically and should include appropriate transitions and topic sentences. The use of bulleted points and/or lists in this section serves the writer's purposes well and makes following the argument easier for the readers.

Within the body of problem-solving and persuasive memos, writers should include a section in which they analyze the problem or discuss the relevant situation. The way this section is organized will depend on the nature of the writer's analysis and the audience's preferences (if known). The organizational principles that will work best depend on the specific situation involved and the audience's preferences. For example, bulleted lists are useful when a set of all available options is provided with no particular priority. Depending on the writer's needs, the following organizational methods might be considered:

1. Prioritized ranking (from most to least important, strongest to weakest, and vice versa)
2. Problem/solution format
3. Comparison/contrast format
4. Chronological order (for time-related matters)
5. Sequential format (for ordered steps that are not time-sensitive)
6. General to specific (beginning with an overview and then outlining specific details, and vice versa) (Oliu et al., 2007, p. 457-58).

These organizational paradigms do not require a significant amount of textual explanation or layout space; therefore, they suit the memo format's streamlined purposes. Following the analysis, writers should provide one or more paragraphs that discuss all viable options for handling the stated problem, including the pros and cons associated with each option and any benefits/risks the company might derive from each alternative. If the results of the pro/con analysis are fairly obvious, this method essentially offers readers a preview of the solution that the writer will recommend in the next paragraph. That is, after the analysis and discussion of a problem, the next paragraph should outline the specific recommendation(s) for handling the problem and an action plan for implementing the suggested solution(s).

If visuals support the analysis, the writer needs to decide whether to include them in the body of the memo or append them as attachments. The general rule is as follows. If the visual is essential to the argument and its size makes it possible to include it with or immediately following the relevant point, do so. If the visual is not essential or too large, include it as an attachment and refer to the visual within the text (Figure 2).

See Figure 7 for an outline of memo components.

FIGURE 7 MEMO COMPONENTS

<p>INTRODUCTION</p> <ul style="list-style-type: none">• Statement of purpose related to the subject line• Summary paragraph with background information (if needed)• Outline of memo’s main points• Indication of whether the memo will offer suggestions, recommendations, etc.• Roadmap to document’s overall structure <p>BODY</p> <ul style="list-style-type: none">• Arrange main points logically• Analyze situation/problem• Discuss viable options• Recommend/suggest best options• Provide action plan <p>CONCLUSION</p> <p>For shorter memos</p> <ul style="list-style-type: none">• Provide a summary of 1-2 sentences.• Specify recommendation(s), or expected action(s) and a deadline (if relevant).• Offer contact information. <p>For longer memos</p> <ul style="list-style-type: none">• Prepare a brief summary paragraph.• Include recommendations, and/or an action plan that specifies the reader’s next step(s) and the deadline (if any).• Provide contact information.
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Formatting Your Memo

Regardless of their purpose, all memos share format characteristics. Every memo should include a header with the word **MEMORANDUM** or **MEMO** displayed prominently. The business or organization’s name should precede the memo header if it is not already part of the letterhead. The four memo headings (*to, from, date, subject*) shown in Figure 8 generally follow the memo header. However, because several different conventional memo formats are acceptable, some writers may list the headings in a slightly different order or, if applicable, in the slots (*to, from, subject*) for email correspondence. The subject line is crucial to a memo’s effectiveness. It should clearly define its specific purpose or topic (Connor, 2012) because it helps the reader gauge the memo’s importance, and determine where to file or save it (if sent electronically). When an organization has an in-house memo stationary or designated format, writers should follow the house style.

FIGURE 8 SAMPLE HEADING

ABC Company	
MEMORANDUM	
TO:	*Name and title of addressee(s). (<i>Names may be arranged in alphabetical order, by rank, department/division; titles may be omitted for informal situations.</i>)
FROM:	Writer’s name and title. (<i>Handwritten initials next to name.</i>)
DATE:	Date writer mailed or submitted the memo
SUBJECT:	Purpose of the memo. (<i>In 4-6 words</i>)
<hr/>	
<i>(The line above separating the memo heading from the memo body is optional) *Align text using tab.</i>	

sample models, strategies and guidelines instructors could use to pursue this approach for teaching students how to write one type of business document, the memo.

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