

Session Objectives:

Fundamentals of effective memos

- Organization
- Clarity
- Types of memos
- Memos about the unpleasant

Fundamentals of effective memos

A memo is a written message that provides personnel a quick and convenient way to communicate with each other.

There are several kinds of memos which can be categorized into two broad types:

Informal memos

These are handwritten memos. They are more commonly used to communicate messages related to day-to-day activities such as conveying telephone messages, to remind people of something, responding to inquiries, and so on.

Formal memos

These are typed messages and appear more formal. These are used to respond to formal queries, convey information pertaining to the business such as sales reports, suggestions for cost improvements, etc.

Reasons for using memos

There are three main reasons for using memos:

- They are convenient.
- They are generally less time consuming.
- They provide a written record for future reference.

Essential characteristics of a memo

To be effective, a memo has to fulfill two essential characteristics – organization and clarity.

Organization

Need to organize: Two main purposes behind the writing a memo are to provide information and initiate a response from the reader. It is therefore important that memos are well organized in their content so that the reader understands the message as well as the action that is expected.

Outline of a well-organized memo

In order to be effective, the following guidelines have to be kept in mind while drafting the memo:

- Each point in the memo must develop a specific idea.
- The memo should be drafted in such a manner that the logic and flow are easy to follow.

- A memo should start with the simple and move on to the complex.

Clarity

Memos are intended to be short and direct. Hence, a memo must have clarity in order to be easily understood. Most memos, however, lack clarity.

Causes for lack of clarity

Lack of clarity of memos arises due to the vague and general manner in which the information has been provided. The nature of the language used is another factor that impedes clarity. Very often, memos are written in complex and ambiguous language.

Methods to improve clarity

In order to be clear, a memo must be written in easy language and must eliminate ambiguity. The message should be direct, concise and simple so that anyone can understand it and the help of an expert is not required to decipher the message. Further, a memo in addition to being well-written should be supported by graphics. In comparison to the use of plain text, the use of graphics allows better communication of the message and is especially appropriate for presenting financial or quantitative data.

Types of memos

There are five basic types of memos – request, confirmation, periodic report, ideas and suggestions, and informal study results.

Request memo

Request memos are written with a view to elicit a favorable response. A well-written request memo is one that is able to motivate the reader to take the desired action. The following guidelines have to be followed while writing a request memo:

- The request should be clearly stated in the memo.
- The memo should present the reasons for the request.
- Explanation should be given for any financial costs that may be involved.
- All expenses should be justified.
- The memo should mention the desired action that the reader needs to take.
- Tact and diplomacy should be used throughout the memo.

Confirmation memo

A confirmation memo is a written confirmation of what has been agreed to verbally. The following guidelines need to be followed while writing a confirmation memo:

- The major points that have been discussed and verbally agreed upon must be specifically mentioned in the memo.
- These points need to be enumerated to emphasize them and to enable easy reference to them in future discussions.
- Feedback should be encouraged on points that are not clear or misunderstood.

Periodic report memo

A periodic report memo is used to depict information that needs to be submitted regularly at frequent

intervals. Examples of such memos are those that are used to present quarterly sales reports, monthly expenditure reports, etc.

The following guidelines need to be followed while developing a periodic report memos:

- A periodic report memo should be designed as a fill-in form in which data can be easily entered.
- The form should be easy to duplicate and reuse.
- Sufficient place should be provided in the memo form to allow the writer to write any comments or remarks, if required.

Ideas and suggestions memo

Ideas and suggestions memos are used for providing ideas and suggestions when they are asked for. Many times, organizations solicit ideas and suggestions from the employees to tackle certain problems. These may be related to improving inter-personal relations, cost reduction efforts, improving the work environment, etc.

The following guidelines should be followed while writing an ideas and suggestions memo:

- Don't be too modest in giving suggestions. Remember that the organization is seeking your opinion, only because they consider it to be valuable.
- Begin the memo by giving positive comments and move on to giving suggestions in a tactful manner.
- Group the ideas together under various headings.
- Be specific.

A well organized ideas and suggestions memo begins by defining the problem, groups the recommendations under various headings and concludes by indicating how the recommendations can be implemented.

Informal study results memo

An informal study results memo is used to present the information obtained from an informal study in a easy to read and understand form.

The following guidelines should be followed while writing an informal study results memo:

- State the purpose of the study at the beginning of the memo.
- Present the results and their interpretation under separate headings to allow easy understanding.
- Address the issues systematically one after the other.
- Write the memo using informal language.

Memos about the unpleasant

It is relatively much easier to write memos that convey pleasant news than those that convey unpleasant news. To convey pleasant news, the memo can be written using a deductive approach. On the other hand, an inductive style is recommended for memos that convey unpleasant news. Since people are not receptive to unpleasant news, these memos should be written in a positive tone. Also, the message should be clear and tactfully written.

The approach to be adopted for writing a memo to convey unpleasant news depends on the relationship with the reader.

Example: During employee evaluations, the supervisors or team leaders inform the

employees of their shortcomings. If the supervisor adopts a deductive approach to communicate the shortcomings of the employee, it would result in demotivating him. In contrast, using an inductive approach and a positive tone makes the employee receptive to the message and helps the supervisor guide the employee to perform better.

Persuasive memos

The purpose of a persuasive memo is to convince the reader to take a specific action. Convincing is difficult especially to an uninterested and antagonistic audience. Using an inductive style for writing a persuasive memo can help the writer of the message communicate it effectively and to obtain the desired response.

Summary

Memos are written messages that are intended for internal circulation within the organization. They may be formal or informal in nature. Organization and clarity are the two essential characteristics that make a memo effective.

The basic five types of memos are request, confirmation, periodic report, ideas and suggestions, and informal study results memo. Memos may also be written to communicate unpleasant news or to persuade. Clarity and tact are vital to make a memo effective.