

MEMORANDUM

TO: Accounting, Business and Economics Students

FROM: Michael J Oakes

DATE: January 7, 2008

SUBJECT: Sample Memo Format and Notes

Memos come in a variety of formats, some of them pretty fancy or specific to a firm or organization. This one you are reading is a simple and general one. You can imitate this or modify it to suit your own tastes. Microsoft Word also provides some templates for memos.

How a Memo is Used

The basic idea behind a memo is that it is used to communicate important information quickly. Use it to indicate new policies, policy changes, summaries of events or meetings, requests for information, or assignments of tasks. Often, memos are a single page; sometimes, a memo might be two or three pages, especially if there are embedded graphs or charts. Like all formal documents, memos should have page numbers if they spill past one page.

Basic Guidelines for Writing Memos

Below are some basic guidelines for how to construct a memo:

1. Always include the following “header” information:
 - name(s) of who received the memo
 - name(s) of who wrote the memo
 - the relevant date
 - a brief line that describes the contents of the memo (often “Subject” or “RE:”)
2. The header information should be spaced and formatted so that it communicates quickly. Double spacing, for example, helps keep the “To” and “From” information from blurring together. When busy managers or executives pick up a memo, they need to be able to read the header information at a glance.
3. If you have several names to list, do so alphabetically. This is both easier and less likely to offend compared to trying to list people by rank or importance.
4. Communicate briefly but thoroughly. Get to the point, but make sure you have explained things well enough so that no obvious questions are prompted after reading the memo. The memo isn’t a college term paper. You can use some contractions, and most of the time your writing style will be informal – but always professional.
5. Often, you’ll find making lists of things a good way to communicate in a memo. Make use of the easy “numbers” and “bullets” formatting in Microsoft Word. Indent

these lists to make reading easier (as I've done here). Do this only when there is an obvious set of items, issues, factors, etc. Don't make every memo paragraph simply a number or bullet.

6. A memo should be single-spaced, with an extra space between paragraphs. That is what is illustrated here in this sample. Some people prefer paragraphs to be indented; it is also fine to not indent paragraphs (as long as there is an extra space between paragraphs).
7. Finally, one more formatting tool that can help communicate quickly in a memo is the use of headings or subheadings. Format these differently than the rest of the memo: all caps, or italics, for example.

That's it. If you have any questions, just ask.

In some way, align and space this information show it is easy to read.

MEMORANDUM

TO: Accounting, Business and Economics Students

FROM: Michael J Oakes

DATE: January 7, 2008

SUBJECT: Sample Memo Format and Notes

Memos come in a variety of formats, some of them pretty fancy or specific to a firm or organization. This one you are reading is a simple and general one. You can copy and modify it to suit your own tastes. Microsoft Word also provides

Single-space a memo. It shouldn't look like a college term paper.

How a Memo is Used

The basic idea behind a memo is that it is used to communicate important information quickly. Use it to indicate new requests for information, or as sometimes, a memo might be used to present charts. Like all formal documents, a memo should be one page.

Use headings to quickly communicate the topic being discussed. Format these to stand out (without looking unprofessional).

Basic Guidelines for Writing Memos

Below are some basic guidelines for how to construct a memo:

- Always include the following "header" information:
 - name(s) of who received the memo
 - name(s) of who wrote the memo
 - the relevant date
 - a brief description of the subject (in "Subject" or "RE:").
- The header information should be placed at the top of the page. Double-space the header information from the rest of the memo. This way, when you pick up a memo, they need to be able to read the header information at a glance.

Use #s and bullets when you have good lists of things. (Here, this list is "general guidelines" mentioned in the first paragraph above.) Don't use them just for regular paragraphs.
- If you have several names to list, do so alphabetically. This is both easier and less likely to offend compared to trying to list people by rank or importance.
- Communicate briefly but thoroughly. Get to the point, but make sure you have explained things well enough so that no obvious questions are prompted after reading the memo. The memo isn't a college term paper. You can use some contractions, and most of the time your writing style will be informal.

Write well, and communicate well. But you should also try to be precise. Don't elaborate on simple ideas, and don't be repetitive. It's not a long essay. It is meant to communicate quickly, concisely.
- Often, you'll find making lists of things a good way to communicate. Make use of the easy "numbers" and "bullets" for lists.

these lists to make reading easier (as I've done here). Do this only when there is an obvious set of items, issues, factors, etc. Don't make every memo paragraph simply a number or bullet.

6. A memo should be single-spaced, with an extra space between paragraphs. That is what is illustrated here in this sample. Some people prefer paragraphs to be indented; it is also fine to not indent paragraphs (as long as there is an extra space between paragraphs).
7. Finally, one more formatting tool that can help communicate quickly in a memo is the use of headings or subheadings. Format these differently than the rest of the memo: all caps, or italics, for example.

That's it. If you have any questions, just ask.

Often, the memo becomes a cover page for tables, charts and other items (such as Excel spreadsheets). So your work doesn't need a title page AND a memo. The memo is the title page.