

# Writing Clear, Effective Business Memos Script

## Contents of the Workshop

- When do you write an e-mail, memo, or letter?
- Plan the memo
- Use the memo format
- Use best practices that present memos clearly
- Write clearly and effectively
- Edit and proofread
- Memo types:
  - Directives: Policies, personnel directives, legal documentation
  - Informational: Information, instructions, changes
  - Proposal memo
  - Persuasive memo
  - Technical memo

## Sample: Writing a Proposal Memo

Write a proposal memo focusing on the impact it will have on the reader. Your goal in a proposal memo is to have the proposal approved. The goal is not to inform, so you will limit the detail to what will favorably influence the reader.

**Consider Using a**

**Background  
Proposal  
Scope  
Opportunities, Benefits, or Justification  
Issues and Questions**

# Template

1. Use a format your company or the reader has established.
2. Consider using a template.

**Implementation or Plan of Action with a Schedule or Timeline**  
**Qualifications**  
**Resources or Changes Needed**  
**Costs**  
**Conclusion**  
**Contacts**

Use a standard format for the proposal memo that your company commonly uses or the reader expects.

Your company may decide to use a template for the proposal memo. It might include some combination of the following headings:

Background  
Proposal  
Scope  
Opportunities, Benefits, or Justification  
Issues and Questions  
Implementation or Plan of Action with Schedule or Timeline  
Qualifications of those involved in the activity of the proposal or of the company in general  
Resources or Changes Needed  
Costs  
Conclusion  
Contacts

## Write a Clear Introduction

- Explain the context or background.
- State the proposed activity.

### MEMORANDUM

**TO:** Martin L. Tiesdale  
**FROM:** Laura Simonson  
**DATE:** March 22, 2010  
**SUBJECT:** Proposal to study the benefits of an employee wellness program

Recently, our group insurance premiums increased because of the excessive number of sick days our employees take and the increased number of

<ul style="list-style-type: none"> <li>• State the contents of the proposal.</li> <li>• State the next action you will take or the action you want from the reader.</li> </ul>	<p>medical claims from avoidable medical conditions. As a result, we are suggesting that we study the benefits of having an employee wellness program at Bronski Glass. Following is a proposal to study the benefits that may result from an employee wellness program. I will call you on Tuesday to make an appointment to talk with you about it.</p>
--	---

Start the memo by explaining the context to the reader: why is he or she is receiving this now? What has led up to this? What is this in response to? Why is this important now?

State the proposed activity in a sentence or two. In the example, the writer is proposing a study of the benefits of having an employee wellness program.

Then explain the contents of the proposal in a sentence. If the proposal has few sections, you might list them.

End the introduction by stating the next action you will take or you want the reader to take.

<h2 style="text-align: center;">Establish the Need and Solution</h2> <ul style="list-style-type: none"> <li>• Write a statement of need that includes the situation, problem, or need.</li> <li>• If appropriate, explain why the current situation is not satisfactory.</li> <li>• State the objectives.</li> <li>• Describe the scope.</li> </ul>	<h3 style="text-align: center;">Need for a Wellness Program</h3> <p>Many studies today have shown that physically fit employees take fewer sick days, have more energy, produce more per hour of work, and are more positive attitude toward their personal and work lives. Unfortunately, the survey we completed in February showed that employees here do not exercise enough on their own time. That is reflected in the increases in insurance premiums we have just had because of the number of common, avoidable illnesses our employees are experiencing.</p> <h3 style="text-align: center;">Objectives</h3> <p>This study will determine from the literature and interviews with companies that have wellness programs whether the following are true:</p> <ol style="list-style-type: none"> <li>1. Wellness programs produce healthier employees.</li> <li>2. Healthy employees are more productive.</li> </ol>
---	--

3. Healthy employees file fewer health insurance claims.
4. Employee group health insurance costs decrease if employees are healthier.

**Scope**

The study will examine descriptions of wellness programs available on the Internet and in books we can locate through a search. We will also contact four companies we know have wellness programs to see how the programs have worked for them.

Write a statement of need that includes the situation or problem.  
 If it fits with your circumstances, explain why the current situation is not satisfactory.  
 State the objectives of your proposal. What are the results you expect that will take care of the need you described?  
 Describe the scope, including the areas to be studied, sources you will look at, target population, location, and other information about what the proposal will be limited to.

**Connect to the Benefits**

- Describe opportunities, benefits, or justification for the proposal.
- Anticipate issues and questions the readers may have in mind and address them here.

**Benefits**

The reports we have from companies that have wellness programs is that they produce healthier employees. As a result of their feelings of wellbeing, the employees are more productive. They file fewer health insurance claims, so their group health insurance costs have decreased.

**Issues**

One objection to a wellness program is that it costs money for employee information and training, and takes employees away from their jobs for short periods. However, the increase in productivity, reduction in sick days, and lower group insurance premiums offset the costs and time off the job.

In the end, the company will save money and have employees on the job more.

Describe opportunities, benefits, or justification for the activities in the proposal. Repeat every problem in the current situation that you described in the first section, and show how this proposal addresses the problems. If the proposal results in additional benefits or makes possible other opportunities, explain them here.

Anticipate issues and questions the readers may have in mind and address them here. In the example, the writer anticipates the objections that the wellness program may be costly and will take employees away from the job. He explains the reasons these will not create difficulties.

## Explain How You Will Implement It

- Explain how you will implement the proposal. Include actions with a timeline.
- Briefly describe the qualifications of the people who will be involved if appropriate.
- If the proposal requires that resources be allocated to or acquired for the project, describe them.
- Describe any costs associated with the project.
- Conclude with a statement of the way the project described in the proposal will benefit the

### Implementation

Jerome, Linda, and Sam will perform the research. They will complete it within this timeline:

Task	Start	Complete
Meet to plan the content of the report	March 1	March 3
Perform the research	March 4	March 30
Meet to plan the outline of the report	April 1	April 2
Divide the report into three parts and each person write the first draft of his or her part	April 5	April 30
Meet to bring the sections together	May 3	May 4
Jerome writes a unified final draft	May 5	May 14
Final review and approval	May 17	May 21

### Resources

We will require no special resources to complete the study.

organization.

- Include contact information for someone to whom questions can be addressed.

### **Costs**

The study will require no extra costs.

Employee group health insurance costs decrease if employees are healthier. I look forward to discussing the possibilities of doing this study. I will call you on Tuesday to make an appointment to talk with you about it. Call me at 309 452-9357 if you have any questions now.

Explain how you will implement the proposal. Include a list of actions with a timeline. Put them into a table to make them easier to follow.

Briefly describe the qualifications of the people who will be involved. Include only those qualifications relevant to the proposal. If the proposal is for an in-house study, such as the example here, you don't need to list the participants' qualifications.

If the proposal requires that resources be allocated to or acquired for the project, describe them here. Include personnel who must be diverted to the project or brought in. If changes must be made in the organization, explain what the changes are. This section will allow the reader to involve the parts of the organization that must be involved in the process.

Describe any costs associated with the project.

Conclude with a summary of the way the project described in the proposal will benefit the organization.

Include contact information for someone to whom questions can be addressed.

Use attachments for detailed information that is important, but too lengthy to include in the memo. Refer to the attachments in the body of the memo and tell the reader what he or she is to do with the attachments. Include a list of the attachments at the end of the memo.