

# How to Write a Business Memorandum

## Introduction

Use this document as a guide to lay out, organize, and structure your business memorandum. The document has three sections: Formatting, Document Header, and Body Organization and Content. The formatting section describes how to set up the document. The document header section, provides you information on the layout and content of the memorandum header. In the organization and content section you will find the minimum sections required in the document and the content you will address in each.

## FORMATTING

This section provides formatting information for your memorandum. If you do not know how to accomplish any of the formatting requirements, there are many good online resources, please consult them.

### Paper

- Complete your internal business memorandum on 8 ½ x 11 inch plain white paper.
- Use portrait page orientation with the 11-inch side vertical (see Figure 1).
- You should not use templates for the memorandum that include decorative graphics in the header and footer (i.e. do not use memorandum templates from word or elsewhere that have graphics or images in the header and footer).

### Margins & Page Footer

- Set up the document with one-inch margins on all sides.
- Place the subject line text of your memorandum in the document footer ½” from the bottom and 1” from the left side of the page. Make the title in the footer one font size smaller than the body text, to set it apart visually. Your inclusion of the title in the footer allows for reassembly of printed copies if pages get separated (see Figure 1)
- Number pages in the margin ½ inch from the bottom 1” from the right side of the paper using the same size font as the body text.

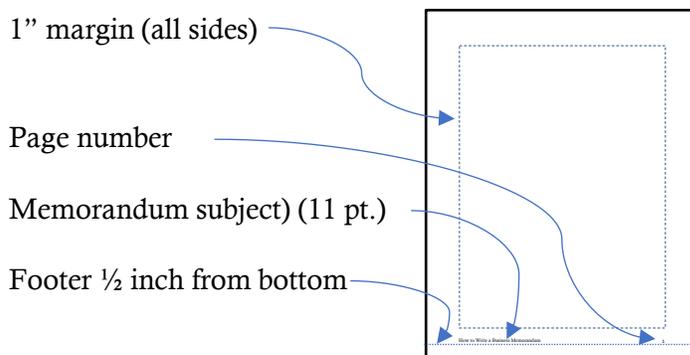


Figure 1: Page Layout

## Paragraph Set-Up

- Set up your document single spaced.
- Set up your paragraphs left-justified with no indentation.
- Remove extra point spacing before and after paragraphs. Manually add an extra line between paragraphs, between paragraphs and titles or subtitles and between titles and subtitles.

## Font Style and Text Size

- Use an easy to read and familiar font such as *Times New Roman* or *Calisto* (or other clean [serif font](#)). You should avoid unusual, unfamiliar, or difficult to read fonts that may make it harder for the memorandum's audience to read the document.
- Use 12 point font size, as it is a good size for readability of business documents. You may go down a point size if it helps you keep the last few lines of a memorandum from ending on a page alone.
- Keep font size consistent in the document unless otherwise specified.

## Document Title

- Start a business memorandum document with the title "Memorandum" or "Memo". Use "Memorandum" for more formal communication, when communication is going to people you work for or their bosses or those outside your organizational group. You may use "Memo" as a title for less formal communication, such as within your working group.
- Center the title horizontally.
- Use a bold, clean [sans serif font](#) (i.e. Arial Bold or Helvetica Bold) in a point size or two larger than the rest of the text. This is the only part of the document that may have a different font style. This title may have lines above and below to accent the title (see Figure 1). If you use lines you must extend them margin-to-margin.

## Section Titles

- Start sections of the body of the memorandum with titles on their own lines. Makes the titles easier to see by making them bold and/or underlined.
- If sections need subsections title them in ways that are visually distinct, but less so than the main titles (i.e. italicized)

## Widows and Orphans

- *Widows* and *orphans* are terms used in document formatting. You need to be aware of these as you should NOT have them in your finished document.
  - *Widows* refers to titles at the bottom of a page where the information after them starts on the next page.
  - *Orphans* refers to one or two lines of a paragraph left at the bottom of the page with the rest of the paragraph on the next page.
- You may set this up as a word rule but should also review your document after it is completely written and edited to make sure there are no widows and orphans.

## DOCUMENT HEADER

This section addresses both the format and content of the memorandum header. This is the lead into a memorandum document NOT a page header, and appears only on the first page of the memorandum. The elements of the document header are: the addressee(s) (to), the writer (from), the date, and the subject of the memorandum. If needed an additional section may be included listing additional people or groups to which the memorandum will be sent.

- First, is the primary recipient(s) and their title(s). List these one name and title per line.
- Next is an optional line titled CC that lists people that are not primary recipients but will be sent copies of the document, with their titles. This may also name groups. Again, list them one name and title per line. Begin each name aligned vertically by setting a tab that allows this.
- The next line is who the memorandum is from and names the person(s) and titles of the sender(s).
- The next line is the date. Format this as month (spelled out fully), day, and year (see Figure 2)
- The last line is the subject; keep this short but also make it clear what the topic is. For example, if you are requesting funding for new ambulances, a subject line that says “Funds Request” is not enough detail, while “Funding Request for 2020 Ambulances for Stations 64, 67, 82 and 95” is too much detail. A more ideal title would be “New Ambulance Funding Request” Each line is left-justified. Leave a line between “Memorandum” and the header, each part of the header, and the header and the body of the text.
- You may include a line below the header that goes across the page margin-to-margin. An example of the title and header is provided in Figure 2.

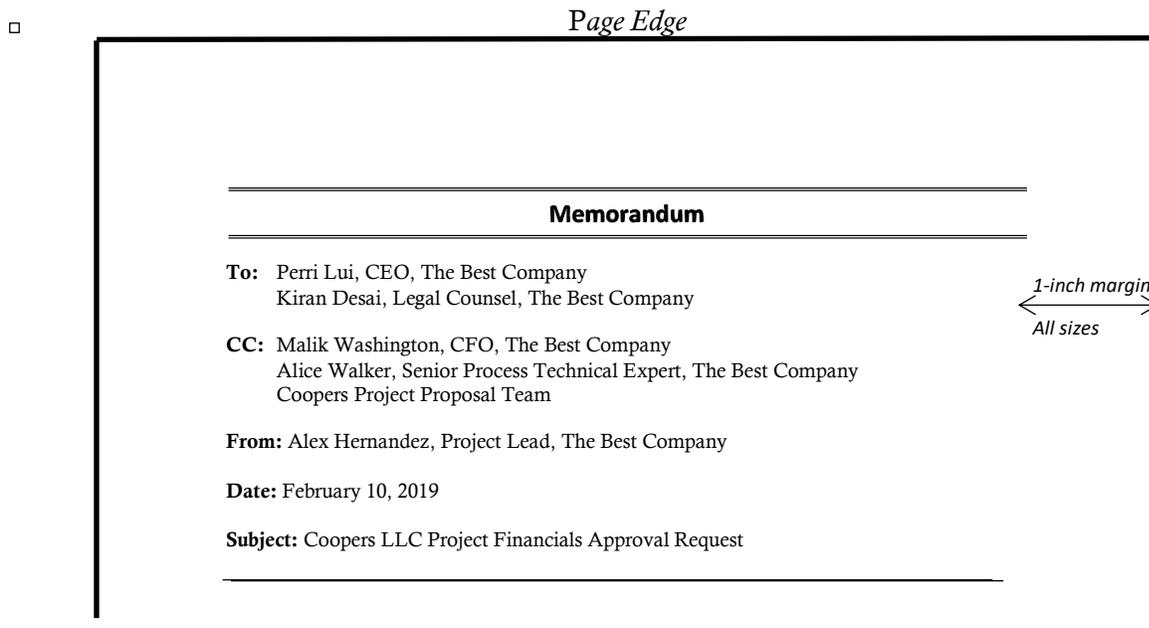


Figure 2: Memorandum Title and Header Example including Content Example

## CONTENT

### **Elements of a Statistical Analysis and Recommendation Memorandum**

Include at minimum the following sections in your memorandum: summary, analysis, conclusion, and addendum. The analysis and conclusion may have subsections, which should be included if you feel subsections will enhance the clarity of your work. Edit the writing for clarity and [conciseness](#). [Reading your document aloud](#) to yourself may help you with this.

#### **(Executive) Summary**

- This section follows the header.
- In a long document title this section “Executive Summary”, while in a shorter one, such as this, it can be labeled “Summary”.
- In this section you will describe the context, your process of analysis, and the recommendation you are putting forward. The context must get a reader who is unfamiliar with the background of what you presenting the essential information to understand your memorandum. Present this [concisely](#).

#### **Analysis**

- This section follows the summary.
- In this you will explain your input, analysis approach, findings and recommendation. Specifically, it should address:
  - What you have been asked to address,
  - The data or input you started with,
  - How you approached the analysis and why it is appropriate for this issue,
  - What you know about the situation because of the analysis,
  - Your recommendation.
- This is the section where you can use graphics to enhance your presentation. Use graphics to:
  - Present data or information more compactly or,
  - Present contrasting data together to make the comparison easy to see or,
  - Make complex data, analysis, or discussion easier to understand.

#### **Visual Support**

- Do not start your document with a graphic.
- If you find you are using more than two sentences to present your data or analysis, consider the use of [tables, graphs, or charts](#).
- Leave two lines above and below the table, chart, or graph with its number and title and the body of the text.
- Place the visual in the document where it can be seen at the same time as the text that refers to it (name the figure or table in the text).
- Avoid saying a graphic is above or below where you discuss it, in case you need to move the location.
- Be sure to include identification of all table and chart elements and a key where it is needed to identify the image or table.
- Include and locate [numbers and titles](#) appropriately.

### **Additional Considerations**

- This is an optional section. You should divide this information out of the conclusion if the content is more than a few sentences.
- In this section you address additional considerations and alternative solutions.
  - First, without undermining your recommendation above, discuss additional input that could be sought and why and how it would make the recommendation stronger.
  - If there is a potential alternative option not addressed in the analysis, address why this option is not as good as the one you are recommending.
- If you have both these items in this section make sure to start with wording that ties them together.

### **Conclusion**

- This is the bookend to the Summary at the beginning where you restate what you are addressing, and what your recommendation is. It is important that you word this differently than the summary at the beginning; this allows readers a second chance to be clear on what you are telling them.
- You may also include next steps when known.

### **Addendum**

- An addendum starts on a new page with the title “Addendum” and a letter or number with a title of the addendum (see Figure 3).
- For this work include the mathematical analysis as an addendum. You may include an addendum with the raw data, or a summary of the raw data, if it is not included in the body of the memorandum. If you have additional research that you do not want to include in the body, but could be helpful to readers, it may be another addendum.

*Page Edge*

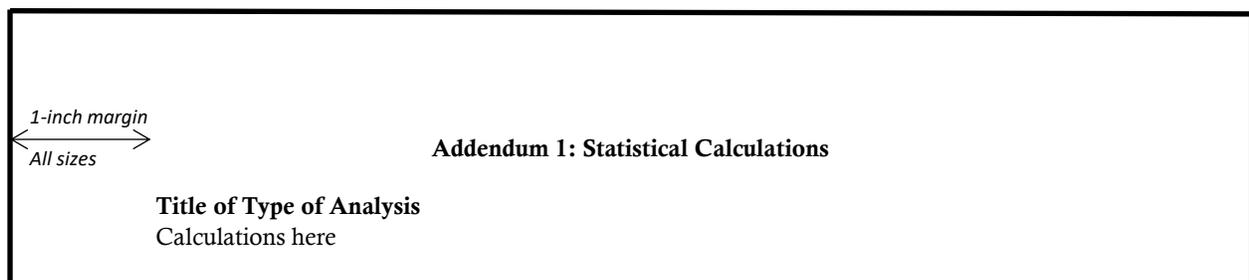


Figure 3: Addendum Page Layout