Assignment One: Memo Punctilio

You have been working for you boss for only about six weeks, and over that time you've noticed that his writing skills as demonstrated in his memos and emails are not as good as they should be. He writes too many messages, and even when the memos are important to read, they are hard to understand. It's not only you who thinks this; you've heard several people in the office complain about it.

Earlier today you were passing by in the hallway and overheard a conversation that your boss was having with the CEO. The CEO was making it clear to your boss that he had to do something about his writing. It looked like the CEO had an article he was giving your boss, and you overheard the CEO say, "Here, read this. It might help."

You returned to our office, but a few minutes later your boss comes in, boiling mad, hands you a photocopy of an article from *Fortune Magazine* by Walter Kiechel entitled "Memo Punctilio". He throws it on your desk and says, "Summarize this by tomorrow noon. Focus on what you think is interesting or useful." And then he storms out.

Your job is to pretend that you're the one asked to summarize this article, but here's what I want you to do:

- For a workshop next class, do an analysis of the situation using each of the analysis steps discussed in class.
- Also next class, bring in an outline of the draft of the summary that you are going to write.
- A week from today, bring in the final draft of your summary.

Memo Punctilio by Walter Kiechel

(FORTUNE Magazine) – Most managers dislike memos. They dislike writing them. They dislike reading them. They complain loudly about how many they receive, and wax eloquent on how disorganized, wordy, and pointless these communications typically are. Advanced thinkers even condemn memo writing as incompatible with modern notions of management. Harvard Business School Professor John Kotter, at work on a book tentatively entitled The Leadership Factor, observes: ''The most effective managers tend not to be trapped in their offices reading reports and writing memos. They talk to people, sit in on meetings, and make speeches to the troops.''

And yet, at company after company, the daily accumulation of memorandums continues unabated, drifting into in-boxes, piling up in drawers, weighting briefcases for the journey home. The coming of electronic mail should not change this. Indeed, almost everyone who has studied computer-screen-to- computer-screen communications in offices concludes that the new systems actually tend to increase the number of memos sent. It becomes so easy just to sit down at the keyboard, tap out your great managerial thought, and send it in an electronic blink to 15 or 20 subordinates.

Why do managers persist in sending so many memos? The reasons range from the truly managerial, through the psychological, to the political.

The memo remains the best single device for communicating substantial chunks of detailed information to a co-worker. Particularly if what you are communicating consists largely of numbers, and particularly if you are going to need a record of the information. A caution here, however: Committing a matter to writing may be dangerous. If your company is investigated or sued, some pesky lawyer for the other side may end up waving the document in the air before the arbiters of the dispute. Or you may get in trouble with your so- called superiors. Robert Swain, who heads an outplacement firm in New York, tells of a manager who was fired because he told the truth about a poor corporate practice in a memo to his boss and staff. The boss did not like seeing the criticism on paper; it meant that he had to do something about it.

The memo is the managerial tool of choice when you want to put out word to lots of people, more than you can conveniently assemble for an oral exhortation. Such communications have to be worded with exquisite care, particularly if they announce bad news for some or all -- a turndown in business, a firing, someone's promotion over rivals. Recipients, usually unable to question the sender directly, are likely to pore over these bulletins from on high with the same energy that Kremlinologists apply to analyzing the list of pallbearers at a Soviet state funeral.

William Morin, chairman of the Drake Beam Morin outplacement firm, notes that memos announcing an executive's dismissal have become more concise, mostly for legal reasons. Companies fear that an old-style recital of the firee's many contributions may end up as

ammunition in a suit alleging that the firing was unjustified. Morin recommends use of the standard form -- ''So- and-so has resigned from the company effective today to pursue personal interests'' (or ''other endeavors'') -- with perhaps a few warm words if the parting is more or less amicable. He also heartily applauds the fact that companies have stopped firing people by memo. In the bad old days, Morin swears, bosses actually sent written communications saying such things as, to a woman being dismissed, ''You have always talked about going home and having a family. It's now time that you did that.''

Some managers use, and overuse, memos because they feel uncomfortable communicating face to face or over the phone. Kenneth Roman, president of the Ogilvy & Mather Worldwide advertising agency, reports that when he comes in on a Monday morning, he sometimes finds ten memos from David Ogilvy waiting for him, even though the legendary adman, now 75, is supposedly retired and living in France. Ogilvy is a terrific writer, of course, but he is also quite a shy man, Roman says. In his memos Ogilvy apparently can give full vent to his feelings, whether of enthusiasm or asperity. An example directed to a subordinate handling the KLM account: ''I have always believed that tourists want fine weather on their vacations. Sunshine -- not clouds . . . Now you are featuring photographs of Holland in fog and cloud. You must have a good reason for doing this. What is it?''

MANAGERS ALSO send memos for political reasons, good and bad: to get credit for their ideas (''I would like to propose a new way to handle . . .''), cover their you-know-what (''While I am not opposed to the project, I do have certain reservations . . .''), or even to set a trap for others (''Would you - please send me your comments on the following proposal . . .''). By and large, a useless memo is rarely held against you, while a good one can advance your cause with the powers above. The chief danger here is that a self-serving ulterior motive -- to catapult the writer into the attention of higher-ups, for example -- may be all too transparent. Edward Fuller, a senior vice president at Communispond, a New York firm that teaches executives how to communicate, advises young people who might be thought uppity to include a phrase like ''Mr. Bossman asked me to write this memo about . . .''

Memos may also convey more subtle political messages, if the recipient has the acuity to decipher them. Eric van Merkensteijn, associate dean of the Wharton School, notes for instance that if someone you usually communicate with in person or over the phone starts sending you memos instead, something has happened, and probably for the worse. ''The ideal work environment is informal,'' van Merkensteijn says, ''characterized by first names, direct expression, trust, honesty. Any step someone takes to bring formality into that environment is a negative.'' You should try to find out what has changed, and to remedy any problems, especially if the suddenly more distant individual is your boss.

Whatever your memo-making motive, try to write clearly. If you don't think that there is already enough bad business prose around, consider the following example from real life. Here's the first sentence of a memo from an executive of a high-tech company, assessing the market for a new technology: ''The market that is near-term as to ability to move on into operational systems with requirements defined and suitable for this technology are the

Government Agencies with environmental data requirements from remote and inaccessible sites where present low data rate communications circuits are not readily survivable.''

When you sit down to write, make sure you have a well-defined purpose in mind. Who is your audience? What do you want them to do? If possible, find out in advance from the intended recipients what information they want. Pick a format and use it to organize your thoughts. Some companies establish a standardized format. ''That sounds cosmetic and kind of dopey,'' allows Mary Munter, a professor at the Amos Tuck School at Dartmouth and author of a book entitled Guide to Managerial Communication. ''But it's not, because it forces people to differentiate their major points from their minor points.'' For writers without guidance from their companies, Communispond recommends the following: a ''To'' line, a ''From'' line, a single line identifying the subject, a brief paragraph stating the memo's message, a summary of the background of the memo, supporting information as necessary, and a concluding summary or statement of the action requested.

Do not, however, let slavish observance of a format get in the way of communicating your message. Probably the most famous stricture in corporate memo writing is Procter & Gamble's requirement that such communications be no more than one page long. The result, according to people who have tried to decipher them, is often a single-spaced document with no margins, full of esoteric abbreviations. A company spokesman confesses that the one-page P&G memo is ''more an ideal than an actuality.''

WHEN IT COMES to choosing your words, write the way you talk, sort of. Remember that you are trying to put an idea across, not to impress the audience with your deep learning or membership in a jargon-speaking elite. Keep sentences short, preferably 20 words or less, and watch your verbs -- the fewer uses of the verb ''to be,'' the better. Contrary to what virtually every writing manual tells you, though, there may be times when you ought to use the passive voice, for good political reasons. Say the boss has proposed another one of his Looney Tune schemes and asked you to find out what people think of it. If you can come up with 17 killer objections but nobody else can, are you going to say, ''I would raise the following objections . . .'' or instead, ''The following objections were raised . . .''?

Keep the memo short. At the end, tack on what the experts call a response mechanism, something like ''I will call you next week to confirm'' or ''If I don't hear from you to the contrary, I will assume the changes meet with your approval.'' Then, once you've completed the memo, hold on to it awhile before you send it out. JoAnne Yates, a lecturer at MIT's Sloan School, reports that managers using electronic mail run a significantly higher risk of getting angry and firing off a memo they later regret. Students of the phenomenon have even coined a name for it: flaming. Which word, used as an adjective to modify a suitable noun like ''idiot,'' is precisely what the recipient will think you are.

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