

8: Write the Memo

The memo is a concise document that communicates the essential findings, recommendations, and next steps in your Completed Staff Work. Its goal is to **present a solution/option to decision-makers in a clear, direct way that's easy to absorb.**

This guide helps you organize and refine each section of your memo, ensuring your work is compelling, actionable, and ready for a quick, confident read.

I will break down the essential sections of a strong memo, guiding you from the subject line through to a powerful closing statement.

Follow each step to structure your message, communicate with precision, and highlight only what's essential.

Step-by-Step Guide

Step 1: Draft a Compelling Subject Line

The subject line is your memo's first impression. It should communicate the memo's purpose clearly so readers immediately understand what it's about.

Write a concise subject line that captures the core purpose or main recommendation of the memo.

Guiding Question: *How can I summarize the purpose of this memo in a single line?*

Tips for a Strong Subject Line:

- **Be Specific:** Include the main topic and recommendation if possible.
- **Use Action Words:** Terms like “Proposal,” “Plan,” or “Recommendation” help convey intent.
- **Keep It Brief:** A short subject line ensures clarity at a glance.

Step 2: Write a Clear Opening Statement

The opening statement sets the memo’s tone and tells readers why they should continue reading. A strong, direct opening quickly communicates the main objective.

In one or two sentences, describe the memo’s purpose and the recommendation. Be direct to help readers quickly understand the memo’s aim.

Guiding Question: *What is the core purpose of this memo?*

Tips for an Effective Opening Statement:

- **Be Direct:** Avoid introductory fluff—get straight to the purpose.
- **Include the Objective:** Mention what the memo aims to achieve or solve.
- **Use Simple Language:** Keep it accessible for a range of readers.

“The purpose of this memo is to [state main purpose or recommendation].”

Step 3: Summarize the End Game and the Problem

Providing context in a few lines helps readers understand the reason behind the recommendation. A brief statement of the end game and problem clarifies both the objective and the challenges.

Write one to two sentences each for the end game and the problem. Focus on clarity and relevance to keep this section concise.

Guiding Question: *What is the goal of this work, and what problem is it addressing?*

Tips for Summarizing the End Game and Problem:

- **Focus on Relevance:** Include only information essential to the recommendation.
- **Keep It Short:** One sentence each should be sufficient for each point.
- **Be Clear and Specific:** State the end game and problem in simple terms.

“The end game is [state end goal], addressing [state the problem].”

Step 4: Present Key Findings and Analysis

Key findings provide evidence and support for the recommendation, helping readers understand the basis for your suggestion. This section adds credibility and depth.

Summarize the main findings, keeping it focused on the most relevant points. Avoid too much detail—this section should offer insights rather than an in-depth analysis.

Guiding Question: *What are the most important findings that support this recommendation?*

Tips for Summarizing Key Findings:

- **Be Selective:** Focus on findings that add the most value.
- **Use Data When Possible:** Quantifiable data (percentages, stats) strengthens your point.
- **Keep It Focused:** Include only findings that directly support the recommendation.

“Key findings include...”

Step 5: Outline the Recommended Solution and Next Steps

This section is the memo’s core, outlining what action should be taken and why it’s the best option. A clear recommendation gives decision-makers confidence in your suggestion.

Describe the recommended solution and list initial next steps for implementation. Make this section actionable to encourage quick decisions.

Guiding Question: *What is the recommended solution, and what are the immediate steps?*

Tips for Outlining Recommendations and Next Steps:

- **Be Clear:** State the recommendation in clear, precise language.
- **Focus on Action:** Use actionable language to make next steps sound achievable.
- **Keep Steps High-Level:** Outline main actions without going too far into detail.

“The recommended solution is [state solution] with the following next steps...”

Step 6: Include a Brief Timeline and Assigned Responsibilities

A timeline and assigned responsibilities make the recommendation actionable by showing when it can be implemented and who will lead each part. This also adds accountability.

Add a brief timeline and assign responsibilities for key tasks if applicable. This section should give decision-makers a clear sense of the implementation schedule and responsibilities.

Guiding Question: *What is the timeline, and who is responsible for each main step?*

Tips for Timeline and Responsibilities:

- **Be Realistic:** Provide a timeline that is achievable and reasonable.
- **Assign Roles:** List specific people or teams responsible for each task.
- **Stay High-Level:** Focus on key tasks without getting into operational details.

“The implementation will follow this timeline and assigned roles...”

Step 7: Write a Strong Closing Statement

The closing statement reinforces the recommendation’s importance, making a final case for action. It can also invite further questions or discussion.

Summarize the recommendation’s benefits and offer to provide more information if needed. A confident, professional closing leaves a positive final impression.

Guiding Question: *What are the benefits of this recommendation, and how should readers follow up if needed?*

Tips for a Strong Closing:

- **Emphasize Positive Impact:** Highlight benefits and impact on goals or performance.
- **Invite Engagement:** Offer to answer questions or provide additional information.
- **Keep It Professional:** Use respectful, professional language to reinforce credibility.

“Implementing this plan will [describe intended outcome]. Please reach out with any questions or for additional details.”

Step 8: Review and Revise for Clarity

A final review helps ensure that your memo is polished, clear, and professional. This is your chance to remove any unnecessary words, check for logical flow, and ensure your memo is compelling.

Read through the memo for clarity, coherence, and professionalism. Remove redundant words and confirm that each section serves its purpose.

Guiding Question: *Is the memo easy to read, professional, and focused on essentials?*

Checklist for Final Review:

- Is the subject line clear and to the point?
- Does the opening capture the main purpose?
- Are the end game and problem statements concise and relevant?
- Are key findings well-supported and easy to follow?
- Is the recommendation clear and actionable?
- Does the closing reinforce the recommendation confidently?