

Memorandum Writing Guidelines And Samples



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Policy Change Memorandum Letter

Dynamic businesses will revisit and review its objectives to foster continuous improvement, thus greatly impacting efficiency of the employee's jobs and clarity of job roles. These inner workings are reflected in the company's policies and procedures, which serve as the backbone of the organization, in order to maintain internal standards and quality.

Changes to policies are periodically made to achieve a positive impact on the workforce, and more specifically, curb company expenses. Change, a constant factor in the business world, must be communicated to those who are impacted by it. More often than not, this is communicated through meetings or through a memo, and in this electronic age, this usually translates into e-mail communication.

This short article lists general guidelines on how to communicate a change in policy to employees. The same is the limitation on this article, in that this does not cover how to communicate the change in policy to its external stakeholders.

Guideline #1: Minor changes in a company policy may be communicated in an e-mail, addressed to those directly affected by the change. The information may be cascaded to the downline/departments/teams through a regular meeting. A memorandum is the most common means of communicating such information.

Guideline #2: Major changes to a company policy must be communicated to the majority of the company through a widespread form of announcement such as an e-mail blast, a town hall meeting or a general assembly. Again, a memorandum is the most common means of communicating such information.

Guideline #3: Always state the section and the content of the policy being changed vis-à-vis the modification or the modified version of the document. For this guideline, it will be helpful to provide visual aids, such as a slide presentation or handouts.

Guideline #4: Allow ample time for the information to be spread prior to setting a date for implementation.

Sample Memorandum (*Minor Policy Change*)

Please be informed that effective 1 July 2010, all vacation leaves and sick leaves must be filed through the company intranet site.

Social responsibility is part of the mission vision of Company X, and this is one way to enjoin all our employees in our promotion of a paperless environment, thus giving back to society.

All paper forms being previously used shall be collected by all Supervisors and Managers for recycling and disposal.

Memorandum Issuing Directives

A memorandum or letter that aims to issue a directive should be written in a professional, simple, yet courteous manner. The directives contained in the letter/memorandum should be clear and precise. Whether it's in letter or memorandum format, the correspondence should clearly state the subject matter. Bullets may be used to highlight key points.

A ranking officer issuing the directives need not discuss so many details in the letter. It may be good, though, to clearly indicate any foreseen problem and how it may be solved. A memo or letter issuing directives specifically states how you expect the reader to proceed in order to accomplish certain tasks.

Memorandum on Sales Department's Participation at FIABCI World Congress

DATE : 18 June 2010
TO : Mr. Lim Meng Wee
FROM : Mr. Victor Wong
SUBJECT : FIABCI World Congress

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The FIABCI is staging the FIABCI World Congress on July 19-23, 2010 in Beijing, China. Kindly inform every member of the sales force to mark the date, since we have signed up as one of the participating firms. I would appreciate it if you would encourage everyone to go, and provide me with the names of those who will be attending no later than the 30th of June. We will, of course, pay the entrance fees for all those attending.

In connection with said event, please handle the following:

- Set up reception table with brochures at the Congress venue
- Coordinate with advertising agency and reserve for advertising space in two major daily newspapers; include an advertorial about our company participation at the National Advertising Congress
- Order new banners and pop-up displays for the aforementioned event

If you have any questions, please don't hesitate to call me up or bring it up at the next management meeting

Thank you for your prompt attention to this matter.

Company Name Change Memorandum Letter

A change in company name equals to a change in identity. Like any major or minor change in the company that directly or indirectly affects all its employees, this must be communicated efficiently and immediately. A change in company name would definitely qualify under major news, so the announcement must be widespread in order to ensure the awareness of all employees. Communication vehicles such as meetings, printed materials, events, and correspondence may be used for this purpose.

There are a few things that need to be considered in composing this particular business announcement. First, always provide a brief summary of the cause of change of name. Second, provide the effective date of the said change. Third, provide means of support should there be any questions. Finally, reassure employees that a change as major as this will not affect their employment negatively. The last thing we want is for our employees to start panicking over a change in company name.

Below is a sample memorandum, which serves as the primary announcement for the change in company name.

Sample Memorandum

**To: All Employees
Fr: The Executive Director
Re: Company X Branding**

Many of you have been involved in our most recent campaign to create a new, fresh, and modern logo for our organization that reflects the direction that we are taking in the next 10 years. We are looking forward to taking this giant leap with you as we venture forward into the future of Company X!

As part of the new direction that the company is taking, we are also bidding farewell to our previous company name, Company X. We have launched several successful and ground breaking projects as Company X, but alongside our effort to move forward is to move away from our traditional brand, and giving way to the modern and innovative products of Company Y!

Effective 01 July 2010, we shall transition to the name “Company Y”. You will be briefed by Human Resources and your immediate superiors as to the department-level changes that need to be immediately implemented.

Also, all employees are invited to join the launch of Company Y on at . Let us join hands and be together as we move forward to our company’s success!

Memorandum – Request of Progress Report

For: Mr. Rhey Santos
Subject: Progress Report on Lending Operations

In connection with the preparation of our annual report on loans, may we request for a copy of the progress report on lending operations as of January 1985 to enable us to get certain data on said report needed for our annual report.

Mr. Henry Tan
Director

Memo – Request Installation of COBOL

Date: January 15, 2000
To: Regie Cheng
From: Delfin Pascual
Re: COBOL in new lab

I would like to request that COBOL be installed in the new lab. We have recently acquired the software via an academic grant.

This should be ready for the semester since we are planning to use the product for 8 programming classes, including several sections of 331, 334 and 335

Advice to Subordinates Memo

A letter from a company officer giving advice to a staff member is usually written when the officer sees that a particular employee needs more guidance from their superiors in the performance of their duties. It can either offer corrective advice to staff members doing a certain task or give suggestions on how a particular job can be performed in a better manner. The most important thing to remember about this type of letter is that its ultimate intention is to help the employee improve their work performance, not to scold them or take them to task for perceived shortcomings.

The essential elements of this type of letter are the identification of the particular duty or task that needs improvement and the advice being given by the letter writer. It can begin with the writer assuring the employee that they are generally satisfied with their performance, and then continue by saying that however, they have noticed the following

areas that could use some improvement. The rest of the letter then gives their advice on how to effect the improvements. The tone of the letter should be professional but not too formal, as the writer does not want to make the employee feel bad.

Below is a sample of a letter in which a supervisor gives advice to an employee.

Sample Letter

April 10, 2010

Nelson and Sons
Washington, D.C.
email@server.org
www.address.org

Janet Andrews
Logistics Department

Dear Ms. Andrews,

Greetings!

To begin, we would like to stress that in general we are satisfied with your performance in fulfilling your duties in the workplace. However, in the interest of making workflow in the office more efficient, we would like to offer to you the following advice.

We have noticed that when you are working, you place your pens and pencils too far to the right of your desk, such that you have to move your chair whenever you have to get a writing instrument. Perhaps you could save some time and work more efficiently by rearranging your desk such that the things you need at hand will be easier to reach.

We hope that you understand that this letter does not represent a reprimand in any way, nor is it a criticism of you, but is merely offered both for your benefit and that of the office.

Respectfully yours,

Randolph Stafford
Personnel Manager, Nelson and Sons

Office Memo – Submission of List Needed Faculty

**SUBMISSION OF LIST OF NEEDED FACULTY
FOR FIRST SEMESTER, AY 2001-2002**

May 12, 2001

**To: Vice President of Academic Affairs (Abucay Campus)
Campus Directors
Associate Directors Academic Affairs
Dean of Various Institutes / Institute Coordinators**

In preparation for the opening of the First Semester come on June 19, 2001, the undersigned is requesting you to submit the list of needed instructors in your respective institutes on or before June 03, 2001. Kindly specify the nature of the possible appointment (Full time/Part time) and the subjects to be taught by each instructor.

For your information, guidance and compliance.

**Rebecca H. Manansala
Vice-President**

Sample Memo – Education Trip

**TO: Engr. Rosalie Lopez
EE Instructor
This College**

- 1. It has reached this office that you went together with the ME Educational Trip last February 12, 13, and 14, 2007 without official permission.**
- 2. Please explain in writing within 72 hours upon receipt thereof why no sanctions must be imposed on you for deserting your classes in February 12 and 13, 2007.**
- 3. Please submit your explanation to this office.**
- 4. Failure to do so shall constitute a waive of your right to be heard.**

February 16, 2007

**Engr. Rexie Roxas
Dean, EE Department**

Memorandum Sample – Daily Time Record

June 30, 2008

TO: All Members of the Faculty

THRU: The Deans

RE: Daily Time Record

- 1. To maintain regular attendance of the faculty in their respective classes, the Accounting Office has pasted on your respective DTR's a copy of your class schedule.**
- 2. The faculty member is under obligation to time-in based on his/her first period of the day and time-out on the last period effective July 1, 2008.**
- 3. The consultation hour of 2 hours a week may be spread, thus: 30 minutes MTWTh from 4:00-4:30 pm or 1 hour MT 4:00-5:00 pm or 2 hours Mondays – 3:00-5:00 pm or to whatever schedule is convenient. In any case the room or office should be**

indicated and the cashier should be given due copy of the consultation period preferred.

For information and compliance.

EDUARDO SANTOS
College Administrator

Letter of Instruction – Retail Credit Sales Instruction

Sample Inter-Office Memorandum

Date: August 24, 2000

From: Credit Office

Subject: Retail Credit Sales Instruction

To: All route Salesmen

Please read carefully and keep for future reference. Whenever a customer requests the privilege of opening an account, or in anticipation of his doing so, the Salesman will secure a Credit Application Card, Form C-800-B, which he will refer to his Foreman after he has recommended the customer for credit. A salesman should not, however, recommend any customer for credit unless he has strong reason to believe that the customer is entitled to such accommodations.

At the time of receiving the credit application, he should secure the complete and detailed information called for on his blank, and in a tactful way explain to his customer that our terms of credit are monthly, bills due and payable of the month following date of purchase. No credit account should be opened in the Route Salesman's book until the customer's credit has been approved by the Sales Manager.

Any credit other than monthly, such as weekly, will be carried by the Route Salesman. However, if an account which a route salesman has authorized as a monthly credit account wishes to pay weekly, there is no objection to this plan. Failure to explain our credit plan fully to the customer and to secure complete and accurate credit information may result in delay in passing on the credit or it may cause a responsible account to be refused credit.

Effective September 1, next, all charge accounts which are owing us more than one month, will become C.O.D. automatically, unless otherwise approved by the Sales Manager.

Inter – Office Memorandum – Credit Terms

Date: June 11, 2000

**To: Juan dela Cruz, Sales Manager
Dong de Leon, Credit Manager
Joseph Santos, Treasurer**

Subject: Credit Terms

It has been consistently reported by several of our salesmen that our credit terms are not fully understood and that as a result we are losing desirable sales. We shall meet at ten o'clock, Thursday June 16, in my office, to discuss possible means of simplifying, and perhaps liberalizing, our credit terms

Will you please study this problem between now and then so that you will be able to make a recommendation?

**Joel Calimbas
General Manager**

Memorandum – Estimated Fuel Consumption

January 8, 2000

**To: Mr. Rafael Torralba
Supervisor – XYZ Co.**

**From: Robin Mercado
Manager – ABC Enterprise**

Re: Estimated Fuel Consumption for Rizal Area

Dear Sir:

Good day!

Attached is the computation of the estimated fuel consumption for Rizal area which we are asking your approval for a subsidy for at least two months beginning this January.

Also, we would like to know if we can set a definite period of time for this transition in the area of Rizal and also the other requirements necessary to comply and achieve set targets for the area.

We're looking forward for a successful business partnership and we want to hear from you the soonest possible time.

Thank you.

Inter-Office Memorandum – Customer Relations

To: All Staff Members Concerned
From: May Grace Cruz, Manager
Subject: Seminar on Customer Relations

Attached is the program for our seminars on Customer Relations in line with our objective of extending the best assistance to our customers in cheerfulness and courtesy.

The seminar will be held of July 15, 2008 at 9:00 A.M. to noontime. Snacks and lunch will be served.

Inter-Office Memorandum – Office Maintenance and Cleanliness

To: All Concerned Personnel
From: Melanie Ramos
Subject: Office Maintenance and Cleanliness

Effective immediately, you are ordered to help observe the following:

1. Return the chairs and office equipment their proper places after usage.
2. Clear the office tables of unnecessary pieces of paper.
3. Littering pieces of paper, cigarette butts, empty wrappers, are strictly prohibited.
4. Vandalism in any form is not allowed.

Memorandum – Absenteeism and Tardiness

To: Emerson Banzon, Office Manager
From: Atty. Fernando Almarin
Subject: Absenteeism and Tardiness of Employees

The management has observed the frequent absences and tardiness of employees for the past two months, which is detrimental to the efficient operations of this company.

Please remind employees concerned to observe strictly the regulations on attendance.

Memorandum – Employee Performance Appraisal

To: All Department Heads

From: Admin. Office

Subject: Employee' Performance Appraisal

All department heads are enjoined to use the new performance appraisal forms and submit the latest ratings of your respective employees not later than June 30, 2008.

Estelita Navarro
Personnel Manager

Memo Documenting Employee Reprimand

Any organization has policies on different aspects pertaining to office actuations. Part of a newly hired employee's company orientation is the presentation of company house rules. All companies have policies on absenteeism, tardiness, proper office decorum, among others.

It is a requirement, with Human Resources Department taking the lead, to keep track of every employee's performance record. This is considered as one of the basis for an employee's promotion or termination. The immediate superior is tasked to document employee reprimands. As a supervisor, you monitor your subordinate's performance and there are times that you will need to correct their behavior. Employees are given notification or citation of a wrongdoing. There are offenses that are considered cumulative; first offense – written warning, second offense – 3-day suspension, and so forth. The reprimand must indicate the signatures of both the recipient and the immediate superior.

MEMORANDUM

TO: Name of Employee

Position

FROM: Name of Immediate Superior

Position

DATE:

SUBJECT: Final Warning

In our previous discussion dated (indicate date), we reviewed your attendance records. Please take note that you have been issued a written warning for poor attendance record on (indicate period) and a 3-day suspension on (indicate dates). Since the suspension, you have been absent on the following occasions:

Date Reasons

Once again, you have exceeded the allowable number of absences in a month, warranting this last step before termination. You have been given enough time and opportunity to effect improvements on your attendance.

You are suspended for (indicate number of days) ____ days starting on (indicate date). To avoid any misunderstanding on your part about how serious this matter is, consider this your final warning. If in case you are to miss going to work, you are to notify me directly and you will not be allowed to report back to work without presenting a valid medical certificate. Any further violation of this policy will result to termination.

A copy of this final warning will be placed in your personnel file.

Name of Immediate Superior – Position

Date

I acknowledge that I have read and understood this memorandum.

Name of Employee – Position

Date

Business Memo Example #1

MEMO

From: The IT Department

To: All Users of the Email System

CC: CIO, CEO, Company Directors

RE: Scheduled Email Server Maintenance

The main email server will be taken down for routine maintenance this Saturday from 11am to 2:30pm. This maintenance window will allow us to do a full system backup, database maintenance to increase speed and reliability, and do our monthly SPAM filter update.

The Email Server will not be available this Saturday from 11am to 2:30pm

If you have any questions or a critical reason to reschedule this maintenance, please call the help desk directly at xxx-xxx-xxxx.

Thank you,

IT Department

Notes: This sample business memo is for an IT outage that is scheduled. You are putting the responsibility on the users to let you know if it is a problem. This is a lot different than asking permission; you are telling them what you are going to do and inviting them to stop you. You made it clear what is going to happen and gave them specific instruction on what to do if they have an issue.

Business Memo Example #2

MEMO

From: John Doe

To: Everyone

CC: Human Resources, CEO

RE: Smoking

Due to several complaints, smoking will no longer be allowed near the main doorway into the building. If you choose to smoke before or after work, you may continue to do so in the alley by the dumpsters. This policy change is in effect for everyone that works for XYZ, Inc. with no exceptions.

Failure to comply with this policy will result in a one-time warning before a written reprimand will be applied to your permanent file and your annual review will be affected.

If you have any questions related to this policy, please contact the Director of HR at xxx-xxx-xxxx or via email at joan@xvx.com. This is the only notice that will be sent on this issue and it will be displayed in the lunchroom and by the main door into the building.

Thank you,

John Doe

HR Guy

Notes: This example of a business memo was much harsher as you are sending it on behalf of someone that has authority over ever recipient. In addition, you have laid out a strict policy for non-compliance and it would almost be considered a favor that you went out of your way to make sure everyone understood the penalties.

Business Memo Example #3

Memo

To: Everyone

From: John Doe

RE: New Addition

Hello everyone! I'm pleased to announce that Mike Jones from accounting is the proud father of a bouncing baby boy. Mike Jr. was born on Saturday morning and weighs 6 pounds 6 ounces. Everyone is in good health and pictures will follow shortly.

Please take a moment and congratulate Mike and Sarah Jones on the new addition to XYZ Corp.

Thanks

John Doe

HR Guy

Notes: This sample business memo is obviously very informal and just a feel good moment for everyone. You do not need to use the CC field or highlight any action items. You are being yourself and at that moment you are not concerned with appearances or proper etiquette. However, make sure this type of memo should be sent by you. It can become a bit annoying when 2,000 people sent out the same email about Mikes new baby.

Memorandum Sample

TO: Kelly Anderson, Marketing Executive

FROM: Jonathon Fitzgerald, Market Research Assistant

DATE: June 14, 2007

SUBJECT: Fall Clothes Line Promotion

Market research and analysis show that the proposed advertising media for the new fall lines need to be reprioritized and changed. Findings from focus groups and surveys have made it apparent that we need to update our advertising efforts to align them with the styles and trends of young adults today. No longer are young adults interested in sitcoms as they watch reality television shows. Also, it has become increasingly important to use the internet as a tool to communicate with our target audience to show our dominance in the clothing industry.

Internet Advertising

XYZ Company needs to focus advertising on internet sites that appeal to young people. According to surveys, 72% of our target market uses the internet for five hours or more per week. The following list shows in order of popularity the most frequented sites:

- Google**
- Facebook**
- Myspace**
- EBay**
- iTunes**

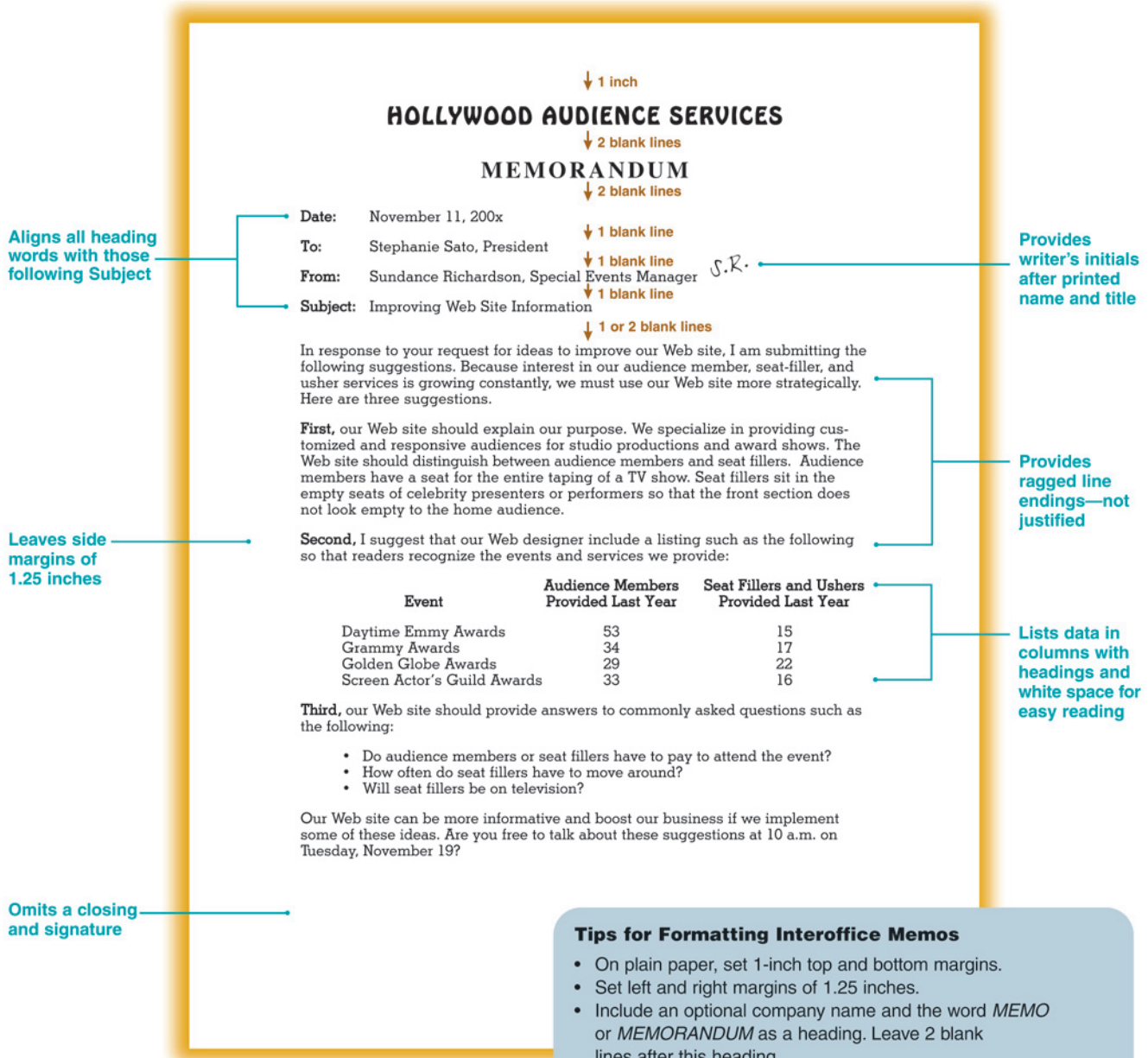
Shifting our efforts from our other media sources such as radio and magazine to these popular internet sites will more effectively promote our product sales. Young adults are spending more and more time on the internet downloading music, communicating and researching for homework and less and less time reading paper magazines and listening to the radio. As the trend for cultural icons to go digital, so must our marketing plans.

Television Advertising

It used to be common to advertise for our products on shows like *Friends* and *Seinfeld* for our target audience, but even the face of television is changing. Young adults are tuning into reality television shows for their entertainment. Results from the focus group show that our target audience is most interested in shows like *American Idol*, *The Apprentice*, and *America's Next Top Model*. The only non-reality television show to be ranked in the top ten most commonly watched shows by males and females 18-25 is *Desperate Housewives*. At Blue Incorporated, we need to focus our advertising budget on reality television shows and reduce the amount of advertising spent on other programs.

By refocusing our advertising efforts of our new line of clothing we will be able to maximize the exposure of our product to our target market and therefore increase our sales. Tapping into the trends of young adults will help us gain market share and sales through effective advertising.

FIGURE 5.3 Interoffice Memo That Responds to Request



Aligns all heading words with those following Subject

Provides writer's initials after printed name and title

Leaves side margins of 1.25 inches

Provides ragged line endings—not justified

Lists data in columns with headings and white space for easy reading

Omits a closing and signature

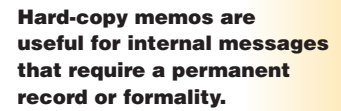
Tips for Formatting Interoffice Memos

- On plain paper, set 1-inch top and bottom margins.
- Set left and right margins of 1.25 inches.
- Include an optional company name and the word *MEMO* or *MEMORANDUM* as a heading. Leave 2 blank lines after this heading.
- Set one tab to align entries evenly after *Subject*.
- Leave 1 or 2 blank lines after the subject line.
- Single-space all but the shortest memos. Double-space between paragraphs.
- For a two-page memo, use a second-page heading with the addressee's name, page number, and date.
- Handwrite your initials after your typed name.
- Place bulleted or numbered lists flush left or indent them 0.5 inches.

- **Interoffice memos.** Paper-based interoffice memos were once the chief form of internal communication. Today, employees use memos primarily to convey confidential information, emphasize ideas, deliver lengthy documents, or lend importance to a message. Memos are especially appropriate for explaining organizational procedures or policies that become permanent guidelines. Later in this chapter you will study various components in everyday interoffice memos.

Formatting Interoffice Memorandums

In the past interoffice memorandums were the primary communication channel for delivering information within organizations. Although e-mail is more often used today, memos are still useful for important internal messages that require a permanent record or formality. For example, organizations use memos to deliver changes in procedures, official instructions, reports, and long internal documents.



Hard-copy memos are useful for internal messages that require a permanent record or formality.

Memo Forms and Margins. Some organizations use printed interoffice memo forms. In addition to the name of the organization, these forms include the basic elements of *Date*, *To*, *From*, and *Subject*. Large organizations may include other identifying headings, such as *File Number*, *Floor*, *Extension*, *Location*, and *Distribution*. Because of the difficulty of aligning computer printers with preprinted forms, business writers may use default templates available on their word processors. Writers can customize these templates with their organization's name. Single-space the message, and double-space between paragraphs, as shown in Figure 5.3.

Contributed By: Shahrooz Khan