



Five Steps to Writing Killer Memos

**A. Trevor Thrall
George Mason University**

The World Runs on Memos!

There's a good chance you're familiar with a fundamental truth: the world runs on memos. In its simplest form, a memo is just a way to communicate information to help a group of people make decisions. Every organization, private, non-profit, or government, uses memos – regardless of what they get called where you work – to help its managers and leaders make crucial decisions. And that means that writing memos is an absolutely critical skill for every professional to have. Writing a killer memo that helps your boss or your organization get an important decision right can literally make your career.

Who the Heck Ever Learned How to Write A Killer Memo?

The problem is, if you're like most people, no one ever taught you how to write a memo at all, much less a killer memo. Even if you're a great writer and you've written lots of fantastic research papers and reports, the memo is a very

different beast. Every semester when my students at George Mason turn in their first memos, they tell me how much more difficult the assignment was compared to what they thought it was going to be: “The memo was so short, I thought it was going to be so easy!” But it isn't. And that's because the memo is a tricky beast that differs from other kinds of writing.

And that's why I created a five-step process for writing a killer memo. Writing is hard for all of us; killer memos are no exception. Maybe you just got your first job and you want to get up to speed quickly. Maybe you've been writing memos for a while, but you find the process frustrating, or you feel like you could be doing better, or maybe your boss flat out told you that you need to work on your writing. Whatever your situation, with a time-tested formula in hand and some practice you'll be writing killer memos in no time.

What's a Killer Memo, Anyway?

Everyone's read a million memos. Some good, some not so good.

But what exactly is a *killer memo*?

A memo is just a document that uses information, analysis, and argument to help people to make decisions and take actions.

A *killer memo* is a memo that does these things in the most efficient and persuasive way.

When we analyze memo that do these things at the highest level, we discover that killer memos are:

- Compelling – killer memos demand attention by meeting the needs of their readers regarding critical issues
- Concise – killer memos respect the time of busy professionals and don't make people read any more than is necessary
- Credible – killer memos are grounded in rock solid research and powerful analysis
- Clear – killer memos make it easy for readers to find and digest critical information and complex analysis
- Convincing – in the end killer memos convince readers of their claims and enable organizations to make important decisions confidently

If your memo does all five of these things, it is going to be a killer memo. If it doesn't, you're at risk of not getting the job done and missing an opportunity to impress your peers and your bosses.

Happily, the five-step process is designed to make sure your memo does each of these things.

The Five-Step Process for Writing Killer Memos

- 1** Start with your audience
- 2** Create a powerful analytical framework
- 3** Organize for maximum impact
- 4** Write clearly, concisely, and confidently
- 5** Rest, review, and revise

Great Recipes Enable Great Performance

Memo writing is like baking a cake – stick with me here! Imagine you have never made a chocolate cake from scratch before, but you have to make one for your daughter’s party. What would you do? If you were like me you would Google chocolate cake recipes, look for one with a five-star rating, and follow it religiously!

If you followed this process you would be pretty certain to wind up with a darn good chocolate cake. Obviously, you could still make a bad cake even if you were using a good recipe, but the recipe takes a lot of guesswork and uncertainty out of the process. And once you had made several cakes using that recipe you would have gotten better at each of the individual steps, which means your cakes would taste even better. And once you had made a lot of cakes you would probably feel comfortable making changes to the recipe to suit your family’s particular tastes.

The recipe metaphor is a useful one when it comes to thinking about writing. Many people fear writing the same way

a lot of people fear cooking: they don’t know where to start and if they don’t bake a lot in general, then they don’t have a familiar process to follow to get things done. Getting a little creative here and there is great, but if you don’t use the right basic mixture of sugar, salt, and flour when you’re baking then your chocolate cake is going to disappoint people. The holds true for memos and trying to write a memo without a proven formula is a recipe for frustration. By ensuring that we follow the same important steps each time, recipes consistently deliver the results we want.

My goal with this guide is to outline for you a foolproof recipe for writing a killer memo. The recipe tells you where to start and lays out the key steps. And just like with your chocolate cake, following this time-tested will help guarantee that your memos make everyone happy. Then with practice you will get better and better at each step and develop your own approach to doing them. Eventually people will come to you asking how to write killer memos.

Step #1 Start with your audience

In so many jobs these days, we can only do our jobs effectively if we first understand the needs of our audience, whether that audience is our students, our customers, our fellow employees, bosses, and so on. Teachers must first find out what their students know and don't know, salespeople need to know what your pain points are, consultants typically begin their engagements with a "needs assessment" designed to illuminate exactly what the nature and scope of a client's problem is before proposing solutions.

As a memo writer, you also have clients, or customers, or stakeholders, whatever you might call them. And so, to be an effective memo writer you need to begin your work with a needs assessment process, asking four critical questions:

The first question is: "Who will read this memo?"

The second question is: "Why do they need this memo?"

The third question is: "What specific decisions will my audience be able to

make and what actions will they be able to take once they have read this memo?"

The final question is: "Based on the answers to the first three questions, what information and analysis does my memo need to cover to meet the needs of my audience?"

Answering these questions will help you make sure that you write a memo focused on the right people, the right goals, and the right information and analysis.

Memo writers who ignore this step are likely to write memos that are less useful, that fail to please the boss or, worse, which create problems rather than solve them.

How formal you make the needs assessment process is up to you. If you are new to your organization, new to the concept of needs assessment, or new to memo writing it will be worth taking some time with this step. If you are an old hand, you may use a less formal approach. Either way, you should never start your memo project without a firm grasp on the needs of your audience.

Step #2 Create a Powerful Analytical Framework

The second key characteristic of a killer memo is that it applies a powerful analytical framework to the question at hand.

The reason for this is pretty simple: the primary goal of your memo is to help your audience make decisions: what software to buy, what product to build, what strategy to embrace, etc.

To help your organization make those decisions your memo has to provide a combination of information about the options, analysis about the strengths and weaknesses of each option, and, if you are asked to give one, an argument about which option is the best.

Thanks to the internet our first tendency is to assemble tons of information because getting our hands on information is easy. But a mountain of information by itself is not very useful. You wouldn't print out a Google search and call it a memo, right? In fact, presenting someone with too much information can make it more difficult to figure out what's critical to the decision-making process because there is too much to sort through.

For this reason, the second step of the Five-Step Process is to develop and apply a powerful analytical framework to address the questions at hand.

The art and science of analysis could fill many books, but in short, an analytical

framework is something that helps you turn raw information into actionable information by identifying the important dimensions of the issue at hand and providing a way to compare options across those dimensions in a rigorous and convincing way.

For some topics doing this is like falling out of bed. If you were buying a car, for example, you immediately know you need to compare options by gas mileage, safety, reliability, and so on. Of course, figuring out what the right dimensions are - and how to measure them - can get trickier when the issue at hand is more complex or when it is difficult to find the right data to measure things.

Regardless of how challenging the analysis is, it becomes more manageable when you break it down into steps:

- Define the problem or question as explicitly and concretely as you can
- Identify the options or alternatives, if appropriate
- Determine the most important criteria for comparing options and alternatives
- Decide how to measure the criteria and gather the relevant data
- Conduct the analysis
- Consider the strengths and weaknesses of each option and identify the trade-offs
- Use the criteria to make a recommendation, if requested

Step #3 Organize for Maximum Impact

After you've figured out what information and analysis your audience needs, and after you've developed a framework and carried out your analysis, the next key is to structure your memo in a way that makes the information and analysis crystal clear and convincing.

If you're like me you've had this experience more than a few times: You're trying to do some project at home, and you get stuck. You fire up Google and you click on an article that says it's going to teach you how to do it. But when you try to read it, even though it's clear the person writing it knows what they're doing, their post is so poorly organized that you have no idea what you're supposed to do when or even how to do it.

All the great analysis in the world can't save a poorly organized memo. If you don't highlight critical information, don't make the analysis clear to the reader, or make it difficult for the reader to follow your arguments, your memo will fail to convince your audience about your findings. In that case, you might as well not have bothered writing the memo.

That's why the third step of the Five-Step Process, even before you have written a single word of your memo, starts with creating an outline to organize all the information you are going to present so that it flows in a logical and easy-to-understand fashion.

Most memos follow a fairly common pattern: an executive summary that provides the “bottom line up front,” a section that provides any necessary

background to allow readers to understand the analysis, a section that explains the data and methods used to conduct the analysis, a section presenting the findings, and a section interpreting the findings and, if required, a conclusion that makes the case for a particular choice, decision, or course of action.

You also need to determine the best way to communicate your key findings and analysis. What is the most logical way to compare the options, to lay out the argument and evidence? Do you need tables and charts? What should they look like?

You should also make use of tactics that I call “road signs.” These are things like section and subsection headings, summary paragraphs, even in certain cases the use of colors and fonts. One simple opportunity people routinely miss is using section headings to summarize the main point of a section. Rather than calling the section “Analysis,” for example, the heading could read, “The Three Reasons Doing X Is a Bad Idea.” Even a busy reader will know exactly what your argument is and as a result will be better able to follow the section that follows.

Most people mistakenly think of these things as insignificant details. But using these road signs can make the memo dramatically easier to read and improve your readers' ability to follow your argument. In a busy world where everyone's attention is split in a thousand different directions, making your memos easy to follow is a big deal.

Step #4 Write Clearly, Concisely, and Confidently

The fourth key principle behind a killer memo is great writing. Poor writing can weaken even the strongest arguments. To produce a killer memo your writing needs to be clear, concise, and confident.

Clarity is important because your readers need to understand the information and analysis if they are going to be able to use it to make decisions. Unfortunately, it turns out that making complex things clear is often very challenging.

Killer memos are also concise and contain no excess verbiage. We need to remember that memos are reading assignments for very busy people. In general, most people would rather do anything than read another memo. Most people won't finish more than a few pages and some not even that many. Therefore, as a rule, memos should be as short as possible.

Finally, killer memos exhibit confident writing. Confident writing is authoritative, persuasive, and memorable writing that convinces your readers to trust your work and to accept your

conclusions. Ideally, it should help them remember the key conclusions long after they have read your memo.

Thus, the fourth step in the Five-Step Process is to follow the outline and write the first draft of the memo keeping these “three C’s” in mind. Happily, if you have been following the process, you are well on your way to producing clear, concise, and confident writing. By addressing your audience's needs and using a powerful analytical framework, you will gain credibility in the eyes of your readers. Through careful outlining and organization, your memo will be structured to maximize its persuasive impact. All that remains is to flesh out the memo.

At this stage, even though your goal is to produce highly polished writing, you shouldn't worry about getting the length, language, or voice of your memo exactly right. The goal of the first draft is to have complete draft of the memo in hand. You'll work on making it perfect in the last step.

Step #5 Rest, Review, and Revise

The final step of the Five-Step Process is do a careful review of your memo and to make the necessary revisions to do two things: first, to polish your writing so that it is clear, concise, and confident. And second, to make sure that your memo presents you, the author, in a polished and professional light.

For those of you who have not yet developed a serious review and revision habit, you will be surprised how much this step helps improve your work. There is an old writer's saying that applies here, "You can't fix a blank page." Getting something exactly right the first time through is almost impossible – and a lot of people get hung up right there. What is amazing, however, is how easy it is to create a polished final product by revising even a very rough first draft.

Assuming time permits I recommend setting your first draft aside for a few days so you can come back to it with a fresh and critical eye. This break also provides you the opportunity to seek external feedback from other readers, which can be incredibly helpful. The revision process also gives you a chance to ensure clarity, conciseness, and persuasiveness as well as to implement effective formatting.

Once you have revised your memo for organization and substance, it's time to do a round of revisions for "beauty." Like it or not, people will judge you not only for the intellectual content of your memos, but on how they look, including things like spelling, grammar, and formatting. It may sound a bit shallow, but people will take your memos - and you - far more seriously if your memos are well polished and beautiful.

Finally, before you hit "send," make sure you can answer yes to all of the following questions on this checklist:

- Does my introduction provide a clear summary of the memo?
- Are my main points and recommendations clear?
- Is my memo's organization clear and are all my sections and paragraphs presented in a logical manner?
- Can my reader easily follow the memo?
- Can an intelligent generalist understand my writing?

More generally, remember that this memo has your name on it. That means that every memo you write is an opportunity to burnish your professional reputation. It's well worth the time to get it right.

Go Forth and Write Killer Memos!

With the five-step process you now have a formula that took me many years of teaching and writing to discover and hone. I hope it helps you write better memos starting today. I'm always thrilled to hear from former students and I'm always looking for better ways to teach memo writing, so please drop me a line at athrall@gmu.edu and share with me your memo writing experiences.

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