Encouraging Critical Thinking in Business Memos

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GOOD MEMOS are first and foremost exercises in logic, evidence, and reasoning. To help both undergraduate and graduate students write memos that are logically complete and internally consistent, I ask them to organize their memos along the lines shown in Figure 1.

![Figure 1. Logic flow of the informative business memo](image)

Organizing the Memo

Here are the directions I provide for using the matrix to organize a memo:

Fill in the Columns

- In the middle column, list each finding you intend to report followed by the evidence and, when appropriate, the rationale that supports it.
- In the first column, write down one or more company objectives that your findings address.
- In the third column, record the action steps required for the company to move from where your findings indicate it is now to where your stated objective indicates it should be in the future.

Revise for Logical Consistency

- Rewrite each finding so it relates to an objective and also accurately predicts the evidence that follows it.
• Rewrite each objective so it reflects the company’s interests.
• Revise each step so that readers can clearly see how the action plan is responsive to the findings and explains how it will help the company approach its goals.

Crosscheck Your Revision
• Read your outline horizontally, in rows, asking this question: Are there clear, logical relationships between each objective and the findings and action steps that address it?
• Read your outline vertically, in columns, asking these questions: Do objectives make sense when read as a group? Do they reflect outcomes and not simply desired processes? Are they listed in order of importance to readers? Is the body logically coherent? If readers read only the first sentence of each finding, will they see each point’s relationship to objectives and to one another? Does each topic sentence accurately predict the evidence that follows? Does the action plan as a whole make sense in terms of who will do what, when, and why?

Add Background and Issues Sections When Necessary
• Beneath your completed matrix, jot historical data that readers unacquainted with this situation need to know so they will understand why you are writing this memo. These data will form the basis for your background paragraph.
• Beneath your matrix, write any future issues that the company may have to address relating to this topic. These issues may be external (such as competitive, customer, supplier, or governmental reactions) or internal (such as potential conflicts over the use of space, equipment, budget, or personnel). These data will form the basis for your discussion of potential constraints or future issues of which the company should be aware before it decides how to act in response to the report’s analysis.

Convert Your Matrix into a First Draft of Your Memo
Write a draft of your memo using these headings in this order: Objectives, Background, Findings, Issues, and Steps. Figure 2 is an example of a memo outline completed in matrix form.
<table>
<thead>
<tr>
<th>Objectives</th>
<th>Findings</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use focus group research to help Xavier meet its new student recruitment goals.</td>
<td>1. All groups ranked XU’s attention to ethics and to individual students as its strongest appeal.</td>
<td>By 2/1/97, the Futures Comm. will design a media campaign stressing XU’s commitment to ethics and its attention to students’ moral development.</td>
</tr>
<tr>
<td><strong>Data:</strong> Focus group findings</td>
<td>2. Cincinnati area business executives ranked Xavier’s business program as the most effective in the tristate area.</td>
<td>The XU Business Advisory Committee will help the Futures Committee develop a print and phone campaign targeted to area business executives. It will focus on XU’s quality business faculty.</td>
</tr>
<tr>
<td><strong>Rationale:</strong> They believed Xavier students bring outstanding business skills to their first jobs.</td>
<td><strong>Data:</strong> Focus group findings.</td>
<td><strong>Rationale:</strong> Xavier’s publicity will highlight the significant amounts of financial aid available to full-time students interviewed.</td>
</tr>
<tr>
<td>3. Xavier’s private school tuition fees put it at a marked disadvantage to Miami U. and the University of Cincinnati.</td>
<td><strong>Rationale:</strong> Price is an important decision criterion to all groups.</td>
<td><strong>Data:</strong> Focus group findings.</td>
</tr>
<tr>
<td><strong>Background</strong></td>
<td>RDI Associates conducted the focus groups on 11/6/97.</td>
<td><strong>Issues</strong></td>
</tr>
</tbody>
</table>

**Figure 2.** A completed matrix forms a memo outline

**Benefits of this Approach**

This approach has several benefits. First, the matrix helps students develop precise logical connections between objectives, findings, and steps. Making explicit the connections between where the company wants to be, where evidence shows it is, and what steps are needed for the future is the key to producing a coherent report, one in which each section flows clearly from the one preceding it.
This matrix is superior to traditional outlining because it allows students to more easily check for logical consistency. Reading across in rows reveals whether each objective is aligned with a point in the body and whether action steps logically flow from the analysis, steps positioned so that they clearly indicate how they will help the company achieve its goals. By reading down the columns, students can see if the objectives are, altogether, an accurate encapsulation of the company's goals with regard to the report's topic. They can also determine if the body makes sense sequentially and if the action steps are appropriate and complete follow-up to the stated objectives, findings, and potential constraints.

The matrix helps students generate an excellent first draft simply by organizing their matrix outline into a conventional sequence of memo headings: Objectives, Background, Findings, Issues, and Action Steps.

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Critical Thinking and Business Ethics

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THE DISCIPLINE of business communication has historically suffered from suspicions that business writing somehow differs from other forms of composition. In addition to being transactional in nature, memos, letters, and reports are seen as modeled on specific formats delineated by usage. Business communication textbooks are typically organized by such genres as routine messages, goodwill messages, persuasive requests, proposals, and reports.

However, I would argue that business communication uses the same forms—causal analysis, classification, process analysis, evaluation—as other forms of composition and that the very act of communicating in the social context of a business culture implies an ethical basis, a respect for persons.