Teaching the Art of the Memo: Politics and Precision

In order to reproduce the politically charged environment of most corporations, I turn my class into a company. Using previously designated study groups, I make one the president, another the vice president, and a final one the manager of operations. Then I give them a problem which they can handle only through memos. Outside of class, they communicate by fax machines. Inside of class, they read and discuss each other’s memos. This assignment enables the instructor to drop out of the role of lecturer as students discover for themselves the complex interaction between a writer and an audience.

Anyone who has ever taught a business communication class knows that teaching students to write effective memorandums is one of the instructor’s hardest tasks. The effective memorandum is brief and carefully focused. Even on a good day, the best of our students have trouble accomplishing both goals. But even if students learn to be brief and precise in their memos, they have still won only half the battle, for memos are highly political. As Booher (1987) says, “Memos are more than a forum for opinions; they are a way of dealing with people” (p. 576). The situations that bring forth these “dealing[s] with people” are as many and varied as people themselves. Instructors must teach more than language skills; they must tie these to the handling of these situations. According to Edwards (1992), the secret of writing good memos is understanding the situation, that is, knowing “what kinds of memos to avoid writing, and when not to write a memo at all” (p. 12).

Given the complexity of teaching students to write memos, it is surprising that the matter is so infrequently discussed in educational journals. The ERIC database contains only two articles that relate specifically to teaching students to write memos: Hennington’s article (1978) on the use of memos as management tools, which appeared in the *ABCA Bulletin*, and Sellers’ article (1990) called “Hope for the Hopeless Writer,” which appeared in *Currents*. Both of these articles were oriented toward the practice of writing memos, not teaching the memo. In fact, Sellers lumps the memo and the business letter together, providing his reader with principles for improving each of these. In short, instructors do not discuss teaching the art of the memo. And yet, the memo is the one type of communication that most of us encounter on a daily basis.

H. William Rice
Shorter College, Rome, Georgia

Memos in Real Life
As I shuffle through the morass on my desk, I find five memos, each of them a sampling of some of those “dealing[s] with people” that Booher mentions. Here is a memo from the secretary of an administrative official at the college where I teach. She is apologizing for the fact that money contributed by faculty members for an ill colleague has been stolen. She is also asking these same faculty members to contribute more money. The politics of her dilemma are difficult indeed. She must apologize in such a way that faculty members will not accuse her of being careless and allowing the theft to take place. She must also encourage them to forget what happened to the money they have already given and give some more, assuring them that their new contributions will be safe.

Here is a memo from the chairperson of the academic computing committee. He is asking for a report from each member of the committee on computer needs within each division. Though he has no apologies to put forth, he does request an action of each committee member. Implied in his memo is an argument that such an action is appropriate and worthwhile — the best way for the committee to carry out its business. (After all, why can’t the chairperson do this nasty leg work?) Moreover, he must make sure that each member understands the division he is responsible for as well as the due date of the report. The first matter is achieved with a list; the second is achieved with promise of another memo that will give the date, time, and place of a forthcoming meeting.

In fact, both memos give birth to new memos, a familiar phenomenon within the business world. The memo concerning stolen contributions is followed by a memo from the relevant administrative officer expressing concern, urging caution, and setting forth a course of action regarding the recent theft. He too has a political agenda. It was his office that was burglarized; if his secretary is accused of being careless, then more than likely he is a large part of the problem. Furthermore, good sense requires him to warn those around him of what is happening in their midst. The academic computing memo is followed by a memo that sets forth a date and time for the aforementioned meeting, clarifies and expands the request for reports, and thanks all involved for their participation.

Just from the memos discussed thus far, we have a multiplicity of motives, anticipated reactions, and desires — in short, a world alive with political gestur-
ing and posturing. And though in many respects any communication between human beings involves these dynamics, the memo is slightly different from most other types of communication, especially the business letter. First of all, it is slightly more common. The morass on my desk does not contain five business letters. People write memos about everything from problems with punctuality to parking space conflicts. In fact, Edwards argues that many of us write more memos than we should (1992, p. 12). Also, since memos are internal documents, they reflect the corporate environment out of which they grow.

The secretary’s memo I just described has a context. It reflects and shapes her corporate environment, what Locker (1992) calls her “discourse community” (p. 37). What do people expect of her? Do they expect her to ask them for money when a colleague falls ill? How have they responded to such requests in the past? Does she have a history of being careless with money? Do people expect memos from her? What is the relationship between the faculty members to whom she writes and the administration (or, more specifically, the administrator) whom she represents? All of these issues, as well as others, are lingering in the context of this memo, implicit in the attitude with which the memo is written and read.

Traditional Approaches

With these facts in mind, we can better appreciate the complexities of teaching students to write memos. Furthermore, we can understand the shortcomings of traditional approaches to this task. I, and most other instructors of business communication, force students to pretend that they are a part of a vaguely defined corporate environment. Then we force them to write a memo to staff members under them or above them. Students must replicate proper memo format. Also, they must make their writing effective.

But this type of assignment is very much what students have grown accustomed to since their freshman year. Essentially, they are being asked to write a very brief essay in memo format. The situation is not of their making. Usually, it is a situation concocted by the author of the book. They study the dilemma as the book presents it and respond with what is usually a well-written memo. I grade it, return it, and if they look at it again, they note any errors they have made. They do not view my comments as a real reaction to the memo. In fact, my comments are not the kind of reaction they can expect in a real-world situation. I can react to the language in the memo, but I cannot fully react to the politics of the memo, for neither I nor the student works in the company created by the textbook writer. In fact, if the students have been attentive, they have noticed that every assignment forces them to be part of a new company. Since the students have no real investment in the situation that gave birth to these memos, they do not fully understand the political dimension of the memo.

Using Study-Group Role-Play to Teach Memos

As an alternate strategy, I have begun turning my class into a company. Luckily, I teach classes that are composed primarily of working adults, so they have a sense of what a company is. Our program admits only adults who are capable of accelerated work, and as a part of the format, the students are routinely divided into study groups consisting of four to five people. The study groups meet independently of the class. The result is groups of people who have very clear group loyalty, much in the same way that divisions within a company create loyalty. Such an arrangement lends itself to role playing. I make one group the president of the company, another group the administrative vice-president, and a third group the manager of day-to-day operations. Then I create a problem that will require that they communicate through memos for the rest of the term.

For instance, I often create a simple problem with work hours. Lower-level staff members are routinely asked to stay 15-20 minutes late to finish assignments. They do not complain, but they have developed the habit of returning from lunch 10-15 minutes late. The president has received notice that the CEO of the parent company will be spending three days observing local operations, and he is known to be fanatical about punctuality. I put this dilemma into the president’s lap, insisting that he or she write a memo that will put into operation a sign-in/sign-out process that will correct the problem with lateness.

The groups work under one restriction: they may communicate only by memorandum. If possible, I make all groups communicate by fax machines. Outside of class each group will write a memo and fax it to the recipient group. I encourage all groups to add details to the situation as they see fit, to improvise strategies – in short to make the situation not mine but theirs. When class meets, group representatives present to the class the memos they have received, their response to these memos, and the memos they have composed.

Every time I have tried this assignment, it has taken on a life of its own. The presidential group develops a strategy that they feel very protective of. They normally write a rather detailed memo describing it. They resist any attempt to criticize their plan or their memo. But the vice-presidential group normally finds grievous flaws with the president’s plan and always finds fault with the memo. In fact, even the clearest memo will fail to communicate in some way. Thus, the presidential group is forced to examine the
actual effects their words have had rather than just the effects they planned for them to have. The managerial group has perhaps the most unusual perspective. They get their directive from the vice-president’s memo, but during the course of class discussion, they become aware of what the president’s memo said. Thus, they see what everyone sooner or later learns: every messenger and every message has some type of bias. Describing and quoting from some of these memos will demonstrate what this assignment produces.

One presidential group devised what they thought was an unassailable strategy. They presented the sign-in/sign-out policy as the only solution to an insurance dilemma: hourly employees had to be on the clock to be covered by insurance. When their memo was presented, the response of the class was unanimous: this argument did not convince anyone. With the CEO visiting the company in less than a week, nobody was buying the argument that a new concern with punctuality was the product of a new understanding of insurance policies. Furthermore, the language of the memo emphasized its insincerity. Early in the memo the president explained the problem in these terms:

While many of the workers often work 30 to 40 minutes late at the end of the day without extra pay and without complaining, we as management are placed in a vulnerable position. By continuing to allow this behavior, we are agreeing that punctuality is not important and that working after hours is encouraged by our company.

The first sentence clearly displays the president’s motive: self protection. The after-hours work of the employees appears in a dependent clause; the main clause of that sentence expresses the main concern: vulnerability of the company management. Though no one in the vice-presidential group faulted the president for the arrangement of clauses in the sentence, they all perceived its result: a tone that demonstrated a lack of concern for employees. They perceived this as an inappropriate way to handle the situation.

The group also objected to the second sentence. It does express what the audience agreed was a good point, that is, that allowing employees to come back from lunch late is a signal that punctuality is not important. But the rest of the sentence glosses over some rather vital issues. The first phrase in the sentence suggests that any overtime worked is “allow[ed]” by company management. Though returning late from lunch would presumably be an employee’s choice, working late probably would not. Thus, the president is not taking responsibility for corporate behavior.

The presidential group complained loudly about this reading of their memo. After all, this memo was not intended for employees; it was for the eyes of the administrative vice-president. But the administrative vice-president group felt a loyalty to the employees of the company, a loyalty that they felt was compromised by the tone of the president’s memo. Furthermore, the last paragraph of the memo brought into play a very powerful word: control. The president stated, “The future of the company depends upon our ability to control the work force effectively.” Then, in a closing paragraph, the president used the word again: “Your ideas, your know-how, and your creativity will make the new system a success. You are in control.”

The vice-presidential group complained that they did not think of themselves as “controllers,” but as managers. Finally, to their eyes, the irony of the last sentence was hardly believable. They were being told to put into operation a policy that they were not necessarily in favor of and then were being told that they were in control. Was this a joke? Clearly, the presidential group’s attempt at creating a “you-attitude” had failed.

The reactions to this memorandum allowed the class to discover the complexities of even the simplest messages. The presidential group’s memo had sent conflicting messages to their audience. It had conveyed a lack of concern for employees by the structure of its sentences. Furthermore, the autocratic intent of the memo had belied the last sentence: “You are in control.” The vice-presidential group was so disturbed by the memo that they felt compelled to conceal its contents from the rest of the staff. Their memo implementing a sign-in/sign-out policy realigned the argument by beginning with what I considered an effective buffer: “Are you willing to make a major contribution in keeping Acme Company number one and remaining the leader in the computer industry?” In the rest of their memo they resisted any argument that sounded even vaguely like the president’s. Their motivation was simply a desire for company success: punctuality is important to customer service; and customer service is the key to making Acme number one.

As their instructor, I considered their memo a substantial improvement upon the president’s memo. But the students in the managers’ group differed with me. They found fault with the argument that punctuality equals good customer service. According to them, unless a substantial number of the staff were directly involved with customers, their punctuality was unimportant so long as they worked a full day. Thus, their memo of response took the company in quite a new direction. The response to the sign-in/sign-out policy was negative. Consequently, morale was at a low ebb, and something had to be done to improve it. They advised a meeting in order for people to “ventilate” their feelings.

The success of this assignment was not that we had discovered anything new about memos. Language worked as it always works: a vehicle to both express and conceal motivations, with amazing potential for
confusion. But importantly, the students taught themselves. I did not tell them that weak arguments leave an audience untroubled; they experienced that. I did not tell them that certain words are by nature potentially explosive; they discovered that on their own. And though I pointed out to them why the president’s tone was offensive, they had perceived it before we analyzed sentence structure. In fact, each new class discovered new aspects of language.

One presidential group instituted a policy that included a sign-in/sign-out system and overtime pay for those who worked beyond 5 p.m. The vice-presidential group implemented the sign-in/sign-out policy but left unclear the overtime pay provisions. They were forced to deal with the wrath of both the president and the managers. Another group thanked the employees for their overtime work by “noting” it: another explosive word. Another group changed the president’s planned sign-in/sign-out policy into a time clock: an explosive concept. In case after case, groups were sent back to their meetings and forced to begin analyzing the effects of their words, not just the meanings. They were being forced to link words to situations, to “dealing[s] with people.” They were experiencing the political dimension of language without my telling them about it.

**Conclusions**

I offer this assignment with some reservations. As with all assignments, it is contrived. I insisted that the presidential group decree a sign-in/sign-out policy because I knew it would be unpopular. Would it be possible to allow the presidential group to come up with a way of handling the problem with lateness on their own? Moreover, would the assignment work among traditional college-aged students whose classes are not normally divided into study groups? The central aspect of this assignment is group identity that is sustained by regular out-of-class meetings. Without these meetings, the assignment would differ only slightly from more traditional approaches, for the students would have no real commitment to the memos.

Despite these reservations, this assignment has something to offer most instructors of business writing. It allows the instructor to slip out of the role of lecturer or grader and enable the students to discover language through exploring that most necessary aspect of the rhetorical situation: the audience. It is only in the mind of an audience that words become explosive, arguments weak, and sentences unsuccessful. And only by committing ourselves to words and their consequences can we discover an audience.

**REFERENCES**


---

**Spring is sprung.**

**The grass is riz.**

**I wonder where the meetings is.**

(Hint: See the calendar in the back of this issue.)