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**MEMORANDUM**

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**TO:**

**FROM:**

**SUBJECT:**

**DATE:**

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This memo is intended for students as a “best practices” guide when crafting executive memos and emails, and includes effective use of descriptive section headings, bullet points, and exhibits. In addition, it provides specific formatting requirements that will be enforced for this class. A thorough understanding of this information is critical to successful completion of class writing assignments.

**Background: Assignments test knowledge using a format which requires concise explanations**

These memos will offer the chance for individuals and teams to demonstrate their understanding of the issues raised in the specific assignments. At the same time, they require students to be concise in how they make arguments and justify recommendations. Therefore, students should decide whether sections like this “Background” are:

- Important enough to include in the body of the memo,
- Better relegated to one of the five (5) permissible one-page exhibits, OR
- Of a significantly low priority that it can be left out completely.

Detailed formatting requirements are attached to this memo in Exhibit A.

**Summary paragraphs, headers, and bullet points: Important aids to your reader**

One mistake often made by students and professionals alike is to treat formal business communications like academic essays or short stories. Instead, memos and emails explaining critical analyses and recommendations should be presented and formatted in a way that quickly gives the reader an immediate sense of what points are being made and why.

An ideal memo or email will open with a summary paragraph that clearly states the intent of the message being delivered. It is not enough to say that a recommendation is coming; make sure you describe it specifically in the opening paragraph. If the reader does not understand the key take-away(s) by the end of that first paragraph (e.g. the decision you think he/she should make and why), **you are wrong**.

The rest of the memo should judiciously combine prose and full sentences with bullet points that quickly summarize and clarify for the reader chunks of information. Furthermore, if/when you choose to use section headers, they should be clear enough that the reader will understand the key takeaway without necessarily having to read the rest of the section.

Two additional benefits of using these tools:

1. **They add visual interest and/or add white space:** this makes the paper even more legible, interesting, and easy to digest; therefore, the odds go up dramatically that you'll successfully convince the reader of your point of view
2. **They give you flexibility in how much room with which you'll have to work:** from a purely practical standpoint, you can use the line spacing rules for bullet points to allow you to use more or less space as you need to meet the one- to two-page requirement

**Optional but helpful: counter-arguments and rejected ideas may strengthen your paper**

At a minimum, your paper must include arguments and justifications which specifically support your analyses and recommendations. Sometimes, this will be sufficient to get your point across, and on occasion, successfully laying out these argument and justifications may use up all your allotted space on their own.

In most instances, however, your paper will be much better if you discuss two additional things that involve anticipating potential challenges to your position:

- **Pro-actively addressing counter-arguments:** the most convincing arguments are made when you can defeat potential challenges to your position before they are even made.
- **Explaining why you rejected other ideas:** similarly, your reader may wonder why you rejected certain arguments or recommendations; the best papers address this head on by acknowledging that alternate ideas were considered but were thoughtfully rejected for very specific reasons.

**A final word: You can do this, and your teammates and professor are here to help**

For many of you, this is the first time you've been asked to write in this style. Don't worry – it takes practice, but you'll be fine. Please don't hesitate to ask for help from your professor, your teammates (when applicable), or other classmates, as appropriate (see Exhibit B for collaboration rules).

## Exhibit A: Detailed Formatting Requirements

All parts of the memo must adhere to the following:

- Exclusive use of 11 pt. Garamond font except in the rare cases where symbols (such as ασδφΖΞΧς to give just a few examples) become necessary.
- One-inch margins for top, bottom, and both sides of page.
- Please note: when using bullet points, the use of punctuation at the end bullet points is optional; however, use or lack thereof should be consistent.

The main body of the memo must be:

- Double-spaced, with no indents at the beginning of paragraphs.
- At least one full page and must not be more than two full pages.
- Please note that the following exceptions apply:
  - Bullet point lists should be single-spaced.
  - The first line after a section heading should be 1.5 spaced.
  - An optional blank line is permitted before section heading. As with other optional items, be consistent: if you use it once, use it everywhere.

Rules for the header at the top of the first page are as follows:

- Include your name or, if a team case, team name and first initial and last name of all team members.
- The subject line should not be generic (e.g. “The Uber Case”) but rather be specific enough to be descriptive as well as to at least hint at the point of our paper.

Rules for Exhibits are as follows:

- Individual exhibits must not exceed one page, and can be single- or double-spaced at the writer’s discretion; however, care should be taken to ensure legibility.
- Exhibits can include text, graphs, charts, tables, combinations of these, or any other information that the writer feels:
  - Summarizes key quantitative data, and/or
  - Provides information to support to his/her argument or recommendation, but in more detail than is necessary in the main body of the memo
- Each exhibit should stand alone and not rely on additional information from the case, the main body of the memo, or other exhibits.
- Exhibits may be copied directly from the case if they add value and if they are referenced appropriately.
- Use of exhibits is entirely optional. No more than five (5) exhibits are permitted to be included with any memo.

Memos must be submitted to Brightspace in Microsoft Word format (i.e. \*.doc or \*.docx).

## Exhibit B: Collaboration Rules

Papers will be assigned as either individual assignments or team assignments. In either case, the following rules apply:

- Students are permitted to use all sources as background information, including internet searches, other individuals, etc. Any use of sources besides the individual (or his/her team for team assignments) must be appropriately referenced.
- Students may discuss the specifics of the assignment with any other student in the class.
- All writing must be the exclusive product of the individual (or the team members, when applicable). Any quotes or ideas taken from any/all other sources, including case materials, must be referenced appropriately.

Plagiarism of any kind will not be tolerated, and, at a minimum, will result in a grade of zero (0) on that assignment (i.e. for team assignments, all team members will receive zero points).

Appropriate references should include author, title of work and/or publication, and date of attribution. They can be included in either the main body of the memo in line with the statement being made or as a footnote.

When using footnotes, you may either:

1. Include these as footers in the document as long as you adhere to the one-inch margin requirements,  
OR
2. As one of your five (5) permissible exhibits.