

## SAMPLE STRATEGY MEMO

The Eugene D. Fanning Center  
University of Notre Dame • Mendoza College of Business

DATE: October 28, 2006  
TO: Management Writing Students  
COPY: Interested People with a Need to Know But No Responsibility  
for Action  
FROM: J. S. O'Rourke (234 Mendoza College of Business; Phone 555-8397)  
Fanning Center for Business Communication  
SUBJECT: **STRATEGY MEMO: FORMAT AND CONTENTS**

This memo format recommends a communication plan in response to a specific event or circumstance facing a company or organization. It will briefly summarize the details of the event/circumstance; discuss their implications, importance, or probable outcome; and will provide a specific list of actions taken and actions recommended.

### **Background**

In this portion of the memo, the writer briefly but completely reviews the *facts* of the case. This paragraph will contain historical data, information that is a matter of public record, and facts that are relevant to the recommended communication strategy.

- Crisp, tightly expressed sentences set apart from the main paragraph by bullet points are often useful in highlighting factual information.
- This paragraph *does not* include assumptions, suppositions, or speculative information. Nor does it include gratuitous references in the first personal singular, such as “I think, . . .” “In my opinion, . . .” or “I feel. . .”
- If a specific source is available for each piece of information in this paragraph, the writer should consider embedding it directly in a sentence, that is, “2000 Census figures reveal that. . .” Another approach is to list a source in parentheses following the information you provide, that is, “Mead Corporation’s Stevenson, Alabama, mill has an annual production capacity of 400,000 tons of corrugated containerboard (Source: *Mead Financial Fact Book*, Mead Corp., 2003, p. 5).”

### **Discussion**

In this portion of the memo, the writer expands on the implications of the facts cited in the Background. This is where the writer explains to the reader what those facts mean and why they matter. The discussion paragraph often becomes the basis for the recommendations that follow. If the discussion is extended or complex, writers often use separate paragraphs, subheadings, and bullet-points to highlight various issues.

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### Recommendations

In this paragraph, the writer lays out each recommendation in specific terms. Where possible, recommendations lead with a verb, are separated from one another with white space, are underlined or printed in boldface type for emphasis, and are either numbered (if the writer recommends more than three actions) or bullet-pointed. For example:

1. **Sign the attached letter of apology to the customer.** The letter not only apologizes for the flaw discovered in our shipment of July 1, but offers a 2% discount on the shipment and a full replacement of all defective parts. (Action: President)
2. **Forward the defective parts to Quality Control for examination.** When the QC report is complete, copies of their findings should be shared with Sales & Marketing, Customer Service, and members of the Senior Management Team. (Action: Customer Service)
3. **Contact the retailer who sold the equipment to review return/refund procedures.** We must make certain that each retailer handling our products fully understands his/her obligation to accept customer returns and to provide full refunds, if appropriate. (Action: Sales Manager)
4. **Follow up with the customer to make sure he is satisfied with our actions on his behalf.** This is a particularly large account and, while each customer is important to this company, some customers are more important than others. Direct, personal contact to assure customer satisfaction, followed by an after-action report for company files, is essential. (Action: Customer Service)

### Other Issues

On occasion, the Recommendations paragraph will be labeled "Actions Recommended", and would be preceded by a paragraph labeled "Actions Taken." The difference is a matter of authority in the organization. The memo writer clearly has authority to take certain actions on his or her own and to *backbrief* the supervisor or manager by means of this memo. That same writer might propose actions for his superiors or for other divisions/agencies in the company that the reader is asked to agree to. It's always useful for the reader to know what tasks have already been done, and what tasks he or she is being asked to approve.

Most memoranda *do not* include a signature block, nor do they feature salutation lines ("Dear. . .") or complimentary closing lines ("Sincerely yours,"). Rather than a full signature, most memos will include the initials of the writer next to the "FROM:" line.

Please note that this two-page memo requires a "second page header" that includes the subject line (exactly as written on page one), a date line, and a page number.

To conclude, most memos will feature some distinctive typographical mark just beneath the last line of type. Some authors will use their initials, others will simply use the pound sign or other mark of their choice.

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