

Sending Memos and Messages



Name: _____

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Introduction

Information and skills you will acquire

Sending Memos and Messages is one of a valuable and user-friendly new series of easy-to-read booklets created specially to help you develop at work. The materials have been created from actual experience in workplace training. Experts from Workbase Training and the Campaign for Learning have pooled their knowledge and experience to involve you in learning new skills and building on those you already have. The booklet is divided into clear *sections*, containing specially devised *activities* and a *mini project*, to allow you to practice as you learn.

This workbook is about sending memos and messages. Many workplaces now use email instead of memos, but you may still need to use memos if you work in a formal environment or for specific tasks. Some of the sections on planning and writing memos may be relevant if you use emails instead.

Sending Memos and Messages will enable you to:

- Lay out memos and messages in a clear and logical way.
- Plan and write memos and messages so that all the relevant information is included.
- Pass on clear and accurate information.
- You may want to work your way through the booklet from start to finish or focus on an area of interest.
- Once you have completed the questionnaire on page 4 you will be able to see clearly which topics you need most help with, and which areas you can safely leave out.
- The questionnaire will also allow you to create your own learning plan, for which an example and space is provided on page 5.
- You may want to ask your supervisor or another colleague for their views on the areas you could work on, or for help with the activities in the booklet.
- As you may want to use the booklet for future reference, you may want to write the answers out in rough first and then write them in the booklet.

Getting the most out of this booklet

Questionnaire

This questionnaire is to enable you to think about what areas of memo and message writing skills you need most help with.

Tick boxes as appropriate

What do you need most help with?

	How often do you need this information/do this in your job?				How confident do you feel?		
	A	B	C	D	1	2	3
	not at all	not very often	fairly often	frequently	not at all	fairly	very
SECTION 1: Purpose and layout of memos							
SECTION 2: Planning and writing memos							
SECTION 3: Passing on messages and information							
SECTION 4: Taking messages on the telephone and in person							

The most important areas for you to concentrate on are those which you have marked B, C, D, and 1 or 2.

Section I

PURPOSE AND LAYOUT OF MEMOS

What is a memo?

A memo is written confirmation of a message, information or instructions. The word 'memo' is short for 'memorandum', which means 'note'.

Memos are generally sent internally within an organisation when a formal letter is not necessary. They are a useful form of communication. Sometimes just speaking to people or passing on verbal messages is not reliable enough.

The layout of memos generally follows a basic pattern. They all have a structure for filling in similar information, such as names and date, but this may be presented in different styles. Below is an outline of a typical memo layout.

MEMORANDUM		<i>To indicate that it is a note</i>
To:	Peter Kerr	<i>Who the memo is for</i>
From:	Jeremy Brown	<i>Sender of the memo</i>
Date:	21st June 20XX	<i>Date sent</i>
Re:	Annual Leave	<i>Subject of the memo</i>
<p>As you requested, here are the dates of my annual leave. My first day of leave will be Monday, July 7th and I will return to work on Monday, July 21st.</p> <p>I have checked that this fits in with the production schedule.</p> <p style="text-align: right;"><i>The message can vary in length It is good practice to sign a memo</i></p>		

The memos you see at work may look slightly different from this example but will usually have a similar layout. Most workplaces have a standard printed memo form.

If you are in the habit of writing notes to people on scraps of paper, try instead to get used to using a form like the one above.

Activity 1

Look at the following case study.

Jane has to book a meeting room for Monday, 7th July. She has to make sure that there are enough chairs for 20 people and that the equipment for a slide presentation will be available. Refreshments are to be served at 11.15 am.

Would it be better for Jane to communicate this information verbally or by sending a memo? Give reasons for your answer.

You will find the feedback to this activity on page 20.

Activity 2

Think about your work or work you have done previously.

What are the weaknesses of verbal communication? What problems have you experienced as a result of passing on messages verbally rather than in writing?

What are the advantages of memos and written messages?

You will find the feedback to this activity on page 20.

Writing a clear memo

When writing a memo you must make sure that you include the important points so that the reader has all the information that is needed. It is also important to ensure that the information you write is correct and complete and presented in a logical order. Section 2 explains how to plan your memo.

Activity 3

Here is an example of a poor memo or message.

MEMORANDUM

To: Jane Dixon
From: Diane Wright
Date: Tuesday

Re: Accident

The accident happened at 2.45 pm. Nicky got some emergency medical help. We carried on with one person short.

Action: Accident form?

Try to identify at least six reasons why this message is poor.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

You will find the feedback to this activity on page 20.

Activity 4

Using a separate sheet of paper, rewrite the memo above to include the following information:

The date and time of the accident: 2.45 pm on 30/11/20XX. Nicola was working on hemming machine H48.

Nicola's finger became caught in the hemming machine needle.

A First Aider came immediately and helped release Nicola's finger from the machine.

An ambulance arrived five minutes later. Diane went with Nicola to the hospital. Nicola had five stitches in her finger.

Nicola will not be at work on 1 December but she will be in the next day.

The Health and Safety Officer, Rita Singh, was called to the scene immediately.

Mrs Singh will be writing a report.

Diane will need to complete an Accident Report Form. The production team was one person short as a result of the accident.

You will find the feedback to this activity on page 21.

If possible, ask a friend or colleague to check your memo.

Key Learning Points

- The word 'memorandum' means 'note'.
- A memo is a form of written communication sent within organisations from one department or team to another.
- Most organisations have a standard memo form for passing on messages.
- The style of memos may vary but they all have the same basic structure.
- You should try to get into the habit of using memo forms rather than writing notes to people on bits of paper.

Section 2

PLANNING AND WRITING MEMOS

Using planning sheets

When writing any kind of document, whether it is a memo, letter or message, it is important that you include all the relevant information. To do this you need to plan your written communication.

Plans can be as simple as you like. Using a planning sheet will help to ensure that nothing important is left out.

Below is an example of a planning sheet. You will find it helpful to fill this in before you begin writing.

PLANNING SHEET	
Questions	Comments
Aims Why am I writing this?	
What action do I want?	
Readers Who is/are the reader/s?	
What is the key message I want reader(s) to remember?	
Method Is this the right time and the best way to send the message?	

Activity 5

Using the information below, draft a memo. Use either your organisation's standard memo format or the form opposite. Spend 5–10 minutes first of all completing the planning sheet.

Information

Your name is Davina McCorr and you work in the filing section of the local planning office. You reorganised the planning records at the end of last year, putting the files in alphabetical order according to street name. When people take out files they are asked to sign out for them in a record book. The files should be returned

Section 3

PASSING ON MESSAGES AND INFORMATION

We all receive messages of one sort or another, both in daily life and at work. It is important to be able to pass on messages correctly.

Activity 6

1. Make a list below of the sort of messages that you receive either in your workplace or at home.

2. Do they contain the complete information you need? Give examples of information that may be missing.

3. What is the most important information needed when you receive messages?

4. What problems arise for you when you get poor messages?

You will find the feedback to this activity on page 22.

Section 4 TAKING MESSAGES ON THE TELEPHONE AND IN PERSON

See also
booklet 25,
'Improving Telephone Skills'.

Taking messages and passing on information are very important parts of working life, whether you are taking messages on the telephone or face to face. Wrong messages can be very costly to organisations and may cause loss of money and customers or wasted time and effort.

Activity 9

Think about what information you need to include in any message you take down at work, either on the telephone or in person. Write a list here:

Do you think it is useful to use a standard message form? Yes/ No

What are your reasons?

Taking telephone messages

When you take a message by telephone you need to:

- listen carefully
- keep a message pad and pen by the phone
- if necessary ask the caller to spell something out or repeat something they have said.

Example: 'Could you spell your name, please?'

Example: 'I didn't catch your last point. Would you mind repeating it please?'

You need to write down:

- who the message is for
- the date and time of the telephone call
- the caller's name
- his/her organisation and telephone number
- a brief summary of the message
- any action needed, e.g. whether the caller will ring back or whether the call should be returned
- your name.

Finally read the message back to the caller and check that it is correct.

More information on using the telephone can be found in booklet 25, 'Improving Telephone Skills'.

Taking messages in person

When taking a message face to face you need to make sure that you follow the same procedure as on the telephone. People often don't write down these messages, thinking they will remember them. This is not the case.

When you take a message in person you need to:

- use a message form
- listen carefully.

You need to write down:

- who the message is for
- the date and time the message is taken
- the person's name
- his/her organisation or department and telephone number
- a brief summary of the message
- any action needed
- your name.

Finally read the message back to the person and check that it is correct.

Activity 10

Look at the message below.

TELEPHONE MESSAGE

For: Diane

From: Peter

Message: Can you ring him today.

Date:

Time:

Signed: Maxine

List four things that are missing.

You will find the feedback to this activity on page 22.

Activity 11

Look at the message below.

MESSAGE

For: Jeremy

From: Someone from Personnel

Message: They need your home address to send out your pension statement.

Date: 09.06.20XX

Time: 1.40 pm

Signed:

List three things that are missing.

You will find the feedback to this activity on page 23.

A standard message form

Always use a standard message form for taking messages. People will take more notice of a formal-looking message than a scrap of paper. Your organisation probably has its own message forms: get into the habit of using them.

MESSAGE	
For:	From:
Message:	
Telephone number:	
Date:	Time:
Signed:	

Key Learning Points

- Whether you are taking a message on the telephone or in person you should write it down.
- It is very important to take down the correct information. Using a message form will help you do this.
- Make sure that you have taken down a telephone number or another form of contact.
- Always read the message back to the caller.
- Always ensure that messages, particularly urgent ones, are followed up.

Mini Project

Carry out a small survey to find out how effectively messages and memos are passed on at your workplace. Talk to at least five people or take copies of the questionnaire below and ask them to complete it.

When you receive their answers, read them carefully and make a note of any positive responses you get and also any improvements that could be made. Pay particular attention to any of the same points that are made by more than two people. Discuss your findings with a colleague or supervisor.

Questionnaire

1. How often do you receive memos and telephone messages in your workplace?

2. Is there a standard format for memos and messages in your workplace? If so, describe it briefly.

3. What could you suggest to improve the quality of (a) memos, and (b) messages in your workplace?

4. Do you think that a particular form of communication should be used more often than others in your workplace? Please give your reasons.

Please return this questionnaire to:

2. The date is not given in full.
3. The names are not given in full.
4. There is no description of the accident.
5. No details are given of what medical help was received.
- 6 It is not clear whether any action has been taken.

You may have highlighted other reasons as well.

**FEEDBACK TO ACTIVITY 4
MEMORANDUM**

To: Jane Dixon

From: Diane Wright

Date: 1 December 20XX

Re: Accident 30/11/20XX involving Nicola Dutta

Nicola Dutta was involved in an accident at 2.45 pm on 30/11/20XX. She was working on hemming machine H48 when her finger became caught in the needle. A First Aider came immediately and helped release her finger from the machine.

An ambulance arrived five minutes later. I went with Nicola to the hospital and she was released after receiving five stitches in her finger.

Nicky will not be at work today but she will be returning to work tomorrow.

The Health and Safety Officer, Rita Singh, was called to the scene immediately and will be writing a report. I will also need to complete an Accident Report Form.

Please note that, as a result of the accident, the production team was one person short from 2.45 pm on 30/11/20XX.

**FEEDBACK TO ACTIVITY 5
MEMO**

To: Planning Section

From: Davina McCorr, Filing Assistant

Date: 29 April 20XX

Re: Planning Records

As you may already know, I reorganised the planning records at the end of last year and introduced a new procedure for taking out and returning files.

Recently a number of files have gone missing.

FeedBack toActivities

Could I remind you of the following:

- The files are in alphabetical order according to street name.
- When you take out files you need to sign out for them in the record book.
- Files should be returned to the in-tray on my desk and their return signed back into the record book.

If you are having any problems with the new system or can suggest any improvements please let me know.

FEEDBACK TO ACTIVITY 6

1. Examples may include: messages on an answering machine; messages from your family about when they will be home; messages from your colleagues about who has called in or phoned you; messages to do things.
2. Examples of missing information may include: telephone number; the name of the person whom the message is from; date and time of the message; important information in the message.
3. Important information includes: date; time; telephone number; who the message concerns; who sent the message; details about what you are expected to do; brief details about the nature of the matter.
4. Typical examples are: not knowing what the problem is; not being able to ring the person back; not being in the right place to meet someone; not being able to complete a job properly.

FEEDBACK TO ACTIVITY 8

This is an example of some of the steps that might be taken in the event of an accident.

1. Switch off any machinery and raise any necessary alarm if this is part of your procedure.
2. Do not move the injured person unless this is essential.
3. Call a First Aider, ambulance or fire service as necessary.
4. Stay with the person until help arrives.
5. Keep talking to the injured person.
6. Report the accident to the Supervisor and the Health and Safety Officer.
7. Assist the First Aider if required.
8. Leave all equipment, etc. in place for investigation purposes and report any hazards.

FEEDBACK TO ACTIVITY 10

1. There are no surnames.
2. There is no date.
3. There is no time.

4. There is no telephone number to return the call.

This is how the message should have been written:

TELEPHONE MESSAGE

For: Diane Diablo

From: Maxine Smith

Message: Can you ring Mr Fioretti about his car (Service no. 3456). He is expecting it to be completed by 4.30 pm today.

Telephone number: 0777 7778

Date: 3 June 20XX

Time: 2.45pm

Signed: Maxine Smith

FEEDBACK TO ACTIVITY 11

1. No surname is given for the person for whom the message is intended.
2. The person who gave the message is not named.
3. You do not know who took the message.

This is how the message should have been written:

MESSAGE

For: Jeremy Walters

From: Pauline Stokes

Message: Please can I have your home address to send out your pension statement.

Telephone number: ext: 6789

Date: 09.06.20XX

Time: 1.40pm

Signed: Sharon Jackson

Do you:

Feel nervous when someone asks you to write a memo or message?

Get confused about what to include?

Feel unsure about how to set out a memo?

If you answered 'yes' to one or more of these questions, you will find that the activities in this booklet will help you with the following:

Knowing and achieving your objective in writing the message or memo.

Setting out a message or a memo.

Deciding what to say and what order to put things in.

Starting off the memo or message.



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