

Chapter 7

Emails and Memos

In this chapter you will learn to

- write a proper email,
- write a proper memo, and
- write a fax or scan.

INTRODUCTION

In your professional career you will be writing emails, memos, and letters. This is true even in professions you'd think would require less writing, such as engineering or the sciences. Yet, as we saw earlier, engineers report that they spend 20 to 40 per cent of their work time on written communication, including memos, letters, emails, reports, and proposals.¹ Good business and professional communication is as important to your reputation and success as your ability to design a strong bridge, plan an experiment, or negotiate a business deal. In Chapters 5 and 6, we looked at designing reader-friendly documents, including emails, memos, and letters. We also presented the conventional formats for these documents. In this chapter, we'll look at the content of the writing you put into your well-designed and properly formatted emails and memos. We'll also briefly consider the scanning and attaching of documents to emails.

1 David F. Beer and David A. McMurray, *A Guide to Writing as an Engineer*, 5th ed. (Wiley, 2019), 1.

EMAILS AND MEMOS

Just as emails and memos are similar in formatting, so emails and memos follow many of the same guidelines for, so we'll consider them together in this chapter. As noted in Chapter 6, memos usually go to people within your own organization; emails can go to anyone. Memos are, at least traditionally, on paper; emails are, again, electronic memos. (We won't cover texting here since texting usually involves short, unstructured messages with no fixed business style or etiquette.)

The purpose of the memo or email, in a professional or business context, is to **make information clear** as concisely as possible. For example, suppose a business team is working on a project. A memo paper trail, or an email electronic trail, means team members are clear about what they are supposed to do as part of the project and when it is supposed to be done.

If team members are not clear on their tasks or timelines, they can always go back and read the relevant memos or emails. Other team members can also check a past memo or email to see who was assigned what task, what that task involved, and when it was to be finished. If someone has dropped the ball, the proof is there in the memo or email.

Or let's say a company vice-president has sent the president a memo urging a particular course of action and the president sends back a memo approving that action. Assuming the memos are both clearly written, there should be no doubt about what the vice-president is proposing, and no doubt that the CEO approved this course of action. If there is a question, anyone can go back and check the memo or email chain.

In other words, in a business and professional context, memos and emails are extremely useful tools.

Let's start with emails; memos will follow.

EMAILS

Emails are amazing. Thanks to the miracle of electronic communication, at the touch of a computer key an email can go anywhere in the world in seconds at virtually no cost. A reply can come back in seconds or minutes from the other side of the planet. The biggest problem with emails is that, because they are sent out electronically via the internet, in theory anyone can read them. Emails are not private in the way that a paper memo is.

In 2005, the CEO of Seattle's Boeing Company, a multi-national aircraft corporation, was fired after emails revealed rather intimate details of an extramarital affair with a fellow company executive. The emails were intercepted by an anonymous source and sent to the company.

You can read more about the Boeing case by using the search terms "Boeing executive," "fired," "affair," and "emails."

The CEO wasn't fired for violating company policy on office romances as such. He was fired because the graphic nature of the emails called his character, and therefore decision-making ability, into question. His actions also reflected badly on the company's reputation. Boeing gets many sensitive and top-secret contracts from both the American and foreign governments; a reputation for strong ethics and propriety is considered one of the company's selling points.

Indeed, almost every week the media reveals stories of embarrassing emails made public on the internet: employees criticizing their boss on Facebook, others accusing an ex-lover of being less than adequate in bed—the list goes on. None of these electronic postings was meant to be made public, but they were, in part because co-workers made them public, in part because even very secure firewalls can be cracked by hackers.

The lesson to be drawn from this for the professional writer is not, “Don't have extramarital affairs or slag other people on the internet,” although that is good advice. The lesson is this: Once your email or other electronic posting has gone into the internet ether, it can, and sometimes will, be made public. It may even go viral.

There is another important lesson to be drawn from the Boeing case: Don't use company email for private, and especially **very** private, matters. Many companies have IT employees whose job includes monitoring company email and internet for inappropriate use, such as downloading porn, playing games online, overly personal messages, and so on. News stories about the misuse of company internet resources also appear with some regularity, often with a firing or public humiliation at the end.

In other words, never, ever, ever send anything out by email (or text) that you wouldn't want the whole world to read. And never, ever, ever send anything out by company email that is overly intimate. That said, most companies don't mind if you make one or two personal emails or phone calls a day while at work, like asking your partner to pick up milk on the way home from the office.

An important characteristic of email is that it doesn't leave a physical paper trail. For example, suppose a government team is collaborating on creating policy. Because the policy isn't finalized and could be quite sensitive, the team might not have put their deliberations on paper quite yet, but there could be a lot of email discussion. (As we've seen, most email isn't safe from prying eyes, but let's assume in this case that the team trusts the government's firewall.)

The problem is that, in the interests of government transparency, many countries have freedom of information (FOI) laws that allow the public to ask for government correspondence, in paper or electronic form.

A few years ago, with FOI in mind, the British Columbia government asked its civil servants to start filing paper copies of all email messages. Undoubtedly, many civil servants followed this order. And, equally undoubtedly, some civil servants stopped putting sensitive discussions into email or memo form and instead held meetings in person or via the phone.

Good Advice

Never, ever, ever write an email in anger and then, because it feels so good, push the Send button. Wait 24 hours. Then, if you still think it's worth the possible fallout, hit Send. Better still, don't.

General rule: If you've got thoughts or information you don't want the world to know, don't put those musings in an email!

Writing Emails: Dos and Don'ts

Emails aren't supposed to be long; they are intended to be short, electronic memos that can be read on one computer screen, without scrolling. If you want to email a long message, you have two options: send it on paper, or send the lengthy part as a file attachment with a short covering explanation in the email text window.

In a professional setting, emails are all about transferring information quickly and efficiently. The speedy part goes without question, thanks to the internet. Efficient isn't as easy to achieve. The French essayist Blaise Pascal once wrote to a friend declaring, "I would have written a shorter letter, but I did not have the time."² It takes time, effort, and thought to make your email messages as concise as possible.

An efficient email is one that presents its information using the **seven Cs**—that is, **clearly, concisely, completely, coherently, concretely, constructively, and courteously**. The **eighth C**, **correct** grammar, spelling, and usage, always goes without saying. An email also considers the needs of its audience (it is **courteous** and **complete**). The guidelines for creating an efficient email are as follows (most of these guidelines apply to memos as well):

- **Keep it short:** The recipient of your email could get dozens if not hundreds of emails in a day. So, ideally, for easy scanning by the reader, make your email no longer than a computer screen. If you've got extra information, put it in an attachment for the recipient to read at leisure.
- **Make subject lines informative:** "This is me!" or "Important!" are not informative and may get you relegated to the "Junk" or "Spam" section of your email recipient's mailbox. If it's you, say who it is ("Email from Bill Sykes"), and say why it's important ("Bill Sykes on designing a new computer app for Japanese client").
- **Use short paragraphs:** Aim for no more than, say, six to eight lines for each paragraph, divided by a space as in a business letter. Short paragraphs are easier on the eyes than long paragraphs. As in a business letter, the first lines of paragraphs are not indented.
- **Use lists whenever possible:** Lists are much easier to read and understand in emails (and everywhere else) than a paragraph.
- **Make sure the email contains all relevant information (is complete):** Don't force your recipient to ask for more information you could easily have supplied in the first email.

2 Blaise Pascal, "Letter XVI," *Les Provinciales, ou les lettres écrites par Louis de Montalte* (Amable Leroy, 1807), 269. The actual quotation is "*Je n'ai fait celle-ci plus longue que parce que je n'ai pas eu le loisir de la faire plus courte.*" A rough and more literal translation: "I only have made this [letter] longer because I have not had the leisure to make it shorter."

- **Avoid emojis and other cutesy email symbols and abbreviations:** Save these for casual, private emails to your friends. Better still, don't use them at all.
- **Use upper and lower case:** Don't send emails in all-capitals or all lower-case letters, which are harder to read than conventional upper and lower case. Also, sans-serif fonts are more readable than serif fonts in an email.
- **Make sure your email address is respectable:** The address "bigfoot_cutie@hotmail" isn't going to impress professional colleagues or potential customers.
- **Avoid chain-letter sorts of correspondence, such as email jokes, cartoons, or inspirational messages:** Save these for your friends. Better still, don't.
- **Keep the "e-trail" short:** When you get past your message and about three earlier messages, start a new chain.
- **Use a salutation:** Unlike formal memos, emails normally have an informal personal greeting to start the body of the text: "Hi Bob," "Bob," "Hello Bob," or "Dear Bob," will all work. Note that the greeting for an email doesn't require a colon.
- **Use a closing:** Unlike formal memos, emails normally have some sort of closing at the end: "Regards," "Cheers," "Best wishes," "Looking forward to our meeting," and so on.

MEMOS

Memos are sent within your organization. As we saw in Chapter 6 on document design, memos are usually on company letterhead, and they begin with some combination of the following elements, usually in this order:

To:
From:
Date:
Subject:

The overall guidelines for memos are similar to emails, with the following additions:

- Because the memo is going to someone within the same institution, it's not necessary to put the title of the sender or recipient ("To: Bill Smyth, financial vice-president" can be "To: Bill Smyth"). Both parties will usually know the title information already. If the person's title is relevant for some reason, then, of course, include it.
- As with emails, make sure the subject line has enough information to signal clearly what the memo is about. Remember your audience: the recipient may get dozens of memos a day. Help this busy person keep track of the relative importance of what's coming in by making subject lines informative.

- Formal memos (unlike emails) usually do not have a greeting and closing. They tend to end with a politely worded request for action.
- The content of a memo often takes the following form:
 - **Purpose** (why are you writing?)
 - **Summary** (what is the content of this memo, in one sentence?)
 - **Discussion** (what are the key points?)
 - **Conclusions, actions, recommendations** (what should happen next?).
- Unlike emails, memos can be any length, from one page to three pages. A memo may be the starting page of a ten-page informal report, such as a progress report (see Chapter 17 on informal reports).
- In the case of multi-page, printed memos, use the same conventions as you would for a letter for the second and subsequent pages. That is, in the upper left corner, put the recipient's full name and, under that, the date, with the page number in the upper right corner or at the bottom centred or some variation of this.
- In terms of writing, the same rules apply as for emails or any other professional correspondence: Keep the message clear, concise, coherent, concrete, constructive, and complete (not to mention courteous and correct). Keep in mind, as always, that your written correspondence reflects **you**: if your writing is sloppy or rude, the recipient will assume you are, too.
- As we saw in the section of Chapter 6 about designing letters, make your memos reader friendly by using headings, lists, tables, and charts to present complex information.

Other than that, follow the same guidelines as you would for emails, but recognize that memos are a more formal and long-lived form of correspondence. The formality of your word choice and sentence structure will depend upon your audience and purpose, but memos will likely be less casual than an email and more casual than a letter. The key thing is to always, always, keep the reader in mind. Ask yourself this: What can I do to make reading and responding to the memo easier?

Figure 7.1 shows a sample memo created using an online template from Microsoft Word.

SCANS AND FAXES

A scanned document as an attachment to an email is a quick and easy way to get important information where it needs to go. The scanned document or a document accessed through a link embedded in an email has largely replaced the fax, a method of sending scanned-in printed material that was essential to business and other professions for many years but is less used today.

TERRAPIN INDUSTRIES

Memo

To: Jenny Partridge, Office Manager
 From: William Chang, Chief Financial Officer
 CC: Helen Petri, CEO
 Date: July 22, 2024

Subject: Printing costs need to come down

I have noticed that office printing costs have risen 32 per cent in the past year. We need to do something about this. **[Introduction concisely sums up the point of the memo]**

After talking with office personnel, I believe the increase in printing costs is due to two factors: **[Provides concrete and specific details in a reader-friendly list format]**

- The new Hesperon printer/copier uses 25 per cent more toner than we were led to expect by the manufacture's specifications. Given past experience in copying and printing, we expected to use four toner cartridges a month, at \$120 a cartridge, for a total of \$480 a month or \$5,760 a year. In fact, we are using five cartridges a month at a cost of \$600 a month, or \$7,200 a year, an increase of \$1,440 a year.
- The Hesperon printer requires high-quality, 30-pound laser paper, costing \$36 per 500 sheets, as opposed to the cheaper, multi-purpose paper, costing \$24/500 sheets, that we used with our previous printer. Considering that we run through 4,500 sheets of paper each month, the cost of paper has risen from \$216 a month to \$324 a month, an increase of 50 per cent, or \$1,296 a year.

The total increase in printing costs for the year is \$2,736, which is \$2,000 above the budgeted yearly increase for printing.

I would like your department to consider two options to reduce printing costs: **[Presents action items]**

- Return the Hesperon printer to the manufacturer for a refund (it is still within the year-long trial period) and purchase a printer that is less expensive, although perhaps not as powerful.
- If we keep the Hesperon, create more stringent controls on staff use of the printer, if this is feasible, so that we are using 30 per cent less toner and paper.

I'd be grateful if you'd do a cost analysis of the two options and get back to me by next Wednesday on the option your department would prefer. **[Courteous closing with timeline for action]**

Main purpose for writing

Summary of main points

Details in reader-friendly format

Action items

Figure 7.1 Sample Memo from a Microsoft Word Template

Until recently, the main advantage of faxes over emails was that faxes qualified as legal copies of documents. Today, however, a scanned and signed email attachment or link-accessed digital document can be a legal document, although the covering email itself is not considered legal.

That said, because they go over telephone lines, faxes are more secure than a scanned document sent on the internet. Therefore, faxes are still a feature in the health and legal professions and others where transmitted data absolutely needs to

be private, and/or where a paper document is still required.

In general, faxes follow the formatting and writing conventions of email and memos. One difference is that a fax requires a cover sheet to introduce the document being faxed.

The cover sheet information will include the date of sending, to whom the document is being addressed (To:) and from whom (From:), and a subject line to introduce what the fax is about.

The cover page must state the number of pages being faxed; this is important in case all the pages weren't sent. The cover letter may end with a hand-written signature and the phone number and/or email address of the sender. Some word-processing programs offer templates for fax cover pages (and for many other documents as well). For example, here's the top of a fax cover page template from Microsoft Word:

TERRAPIN INDUSTRIES

Fax

Date: July 22, 2024

Fax: 555-555-3109
 Attention: Jenny Partridge, Office Manager
 Office location: 2nd floor, #288

From: William Chang, CFO
 Office Location: 3rd floor, #244
 Phone number: 555-555-2287

Total pages including cover: 4

Urgent ☐ For Review ☐ Please Comment ☐ Please Reply ☐

Comments:
 Discusses increased paper and printer costs with new printer

229 First Avenue, Terrapin, BC V7Y 3R6 Phone: 555-555-2233 Fax: 555-555-3100
 Website: www.terrapiindustries.com

Figure 7.2 Sample Fax Cover Page from a Microsoft Word Template

Getting back to scans: While a scanned document is far easier to send than its fax equivalent, there are still a few factors to consider before hitting send.

- Ensure you send a document in a format (e.g., PDF, TIFF) your recipient can access. If you are unsure, check before you send.
- Ensure your scanned document is of a high-quality resolution (at least 300 dpi). The scan needs to be clear and readable, especially if it's a legal document.
- Pick an appropriate but brief file name for your scan so the file is easy to identify, such as "Marmot figurine contract."
- Write a courteous cover email that clearly identifies the attached scan in the subject line. The body of your email should further explain the attached document and outline what is required.