Mohammed Atef was furious.

The Al Qaeda leader had learned that a subordinate had broken the rules repeatedly. So he did his duty as the feared military chief of a global terror network: He fired off a memo.

In two pages mixing flowery religious terms with itemized complaints, the Egyptian boss accused the militant of misappropriating cash, a car, sick leave, research papers and an air conditioner during “an austerity situation” for the network. He demanded a detailed letter of explanation.

“I was very upset by what you did,” Atef wrote. “I obtained 75,000 rupees for you and your family’s trip to Egypt. I learned that you did not submit the voucher to the accountant.”

To: Anyone Who Seeks to Influence Policy and Management
From: Bob Behn
Date: Timeless
Re: The Craft of Memo Writing

You can influence people — and thus both policy and implementation — in three ways: by writing, by speaking, and by sending symbolic signals. Early in your career, your writing may be your most important tool of influence. If your ideas make sense on paper, others may invite you to explain them to larger audiences. And as your career progresses, you will be able to engage in symbolic activities to personally dramatize the messages you send by writing and speaking.

To influence policy, competence in writing has long been necessary. In his autobiography, Benjamin Franklin recalled that “prose-writing has been of great use to me in the course of my life, and was a principal means of my advancement.” Indeed, of the North American colonies, the historian Gordon Wood observes:

writing competently was such a rare skill that anyone who could do it well immediately acquired importance. All the Founders, including Washington, first gained their reputations by something they wrote.

Fortunately for you, writing competently is still — two-plus centuries later — a rare skill.

Unfortunately, you may never acquire the importance and influence that you seek — and make the career advances that you desire — without first developing your ability to write clearly, coherently, and persuasively. Thus, you need to devote significant time, thought, practice, and work to ensure that your writing is influential.

You need to become a master of that much maligned — yet genuinely powerful and universally indispensable — policy tool: the memo.

The Influential Memo

“If people don’t read what you write, then what you write is a museum piece.”

Theodore Levitt
or she dashes out of the office, stuffed into a briefcase, and only retrieved with a jumble of other coffee-stained papers in Seat 29B. Most policy makers find that their memo-reading time is scarce. They refuse to waste this precious asset on junk.⁶

The Memo-Writer’s Challenge

“Each good memo you write will help your reputation.” Sarah Lamb⁷

In writing a memo, you are competing for the valuable time of some very influential people. At the Kennedy School, a course instructor must read every student’s memo. After you leave the Kennedy School, however, no one is required to read a single one of them.

Thus every memo writer faces a challenge: How do I convince people to read what I have written. If you acquire a reputation for producing chaotic, long-winded, obtuse, or irrelevant memos, they will accumulate in everyone’s someday-I-have-to-read-this-stuff pile. If you can establish a reputation for writing organized, concise, clear, informative, and useful memos, people will start reading them. They will start paying attention.

To increase your influence, you need to work at building a reputation for crafting memos that people believe they have to read. Then, work at developing a reputation for designing memos that people want to read.

Your First Sentence

“The Herdmans were absolutely the worst kids in the history of the world.” Barbara Robinson⁸

In anything you write, your first sentence is your most important sentence. If your first sentence is boring, if your first sentence is incoherent or irrelevant, if your first sentence contains nothing that is new, or interesting, or informative, no one will read your second sentence. Thus, you should deliberately craft your first sentence to convince an audience drowning in paper and flooded with e-mails — someone who is glancing at your memo while waiting for someone else to answer the phone — that you have some ideas that deserve attention.

* Don’t waste your first sentence on boilerplate.
* Don’t waste your first sentence telling your readers things they already know.
* Do use your first sentence to convince your very busy audience that the rest of your memo (or, at least, your next sentence) is a must read. Use your first sentence to persuade them that your few pages are precisely what they need to know to solve one of their most pressing problems.

What makes Barbara Robinson’s first sentence the best first sentence I have ever read? Answer: Because it makes you want to read the second sentence. Indeed, it compels you to read the second sentence. You can’t help yourself. You just have to know who these Herdman kids are and what makes them so bad that, on the world’s worstness scale, they are ranked at the very top.

The purpose of your first sentence is to convince your audience to read your second sentence.
Self-critical writing is a necessary tool for thinking analytically. Indeed, you may not know what you truly think until you commit that potential (though still amorphous) thought to paper and then evaluate it analytically, critically, dispassionately:

- Does this sentence make sense? Does this paragraph make sense?
- Does my entire memo possess a coherent, internal logic?
- What are the flaws in my core idea? In my explanation of this idea? In the reasoning and evidence supporting this idea?
- Who might quarrel with my analysis in this memo? On what basis? What part of the memo do I need to modify to anticipate and rebut this criticism?
- Have I been too lazy to think through this problem carefully and clearly and thus resorted to filling my memo with vacuous jargon?\(^9\)

This explains why writing is, itself, analytical. Like any analytical method, it disciplines thinking. Like any analytical method, it can be employed imperfectly or even badly. Nevertheless, analytical writing can foster analytical thinking.

The Russian psychologist, Lev Vygotsky, argued that thinking was an internal conversation and that writing down such thinking made these thoughts more explicit. Moreover, the individual, through the struggle to commit to paper his or her precise thoughts, did not merely clarify and polish these ideas but also began to uncover new ideas and new ways of thinking about the problem.\(^11\)

In a U.S. Supreme Court case concerning religious invocations at high school graduations, Justice Anthony Kennedy, in a preliminary vote, sided with a majority of justices to uphold the prayer as constitutional and was assigned the task of writing the decision. But, as he struggled to put his ideas down on paper, as he sought to make his thinking precise, he changed his mind: “After writing to reverse the high school graduation prayer case, my draft looked quite wrong. So I have written it to rule in favor of the objecting student.”\(^12\)

An effective policy memo is convincing because of the coherence of its underlying logic — and because of the clarity of its presentation of that logic. The logic emerges, however, only from careful thinking — from thinking that is disciplined by the need to put down on paper words that unambiguously explain these ideas and that deal equally explicitly with, at least, the most obvious or relevant objections.

Good writing requires good thinking. No writer can save poor thinking. You cannot rescue poor ideas with clever words. But bad writing can — and too often does — sabotage good thinking.
Form Follows Function

“It is the pervading law of all things organic and inorganic, of all things physical and metaphysical, of all things human and all things super-human, of all true manifestations of the head, of the heart, of the soul, that the life is recognizable in its expression, that form ever follows function. This is the law.” Louis Sullivan

Louis Sullivan, the architect who helped rebuild Chicago after the fire of 1871, had it right — and not just about buildings. He also had it right about memos: Form follows function.

A memo can serve a variety of functions: to convey an idea; to influence your audience’s thinking; to convince people that your proposed policy is superior; to persuade people to implement your management strategy. Thus, when writing a memo, don’t surrender to some mindless template. Instead, create a form for your memo that best performs this function — that most persuasively presents your message.

Help your reader understand your message. Don’t bury your key idea in the middle of page 3. Don’t save it until the end, as if you were Anne Perry crafting an enigmatic mystery novel. Do organize every paragraph so that its key point is absolutely clear — so that it jumps off the page.

Design Your Memo

“Most people make the mistake of thinking design is what it looks like . . . That’s not what we think design is . . . Design is how it works.” Steve Jobs

Don’t just write your memo. Design it. Employ headings and subheadings, bullets and italics — and white space too — to impart the structure of your argument and to highlight your key points. Design your memo so that a reader can scan it quickly and grasp your message.

At the same time, don’t distract the reader by mixing in too many fancy fonts, by underlining too many words, by creating too many subsections with too many subheadings, by puncturing the page with too many bullets. If your formatting is too confusing, you will only distract or discourage potential readers.

Avoid the obtuse background section. Lazy writers dump into a background section all of the information that they think their audience might need to know (though they never explain why). Whenever a reader’s eyes see the dreaded “Background” heading, his or her neurons fire the word “Boring.” No one reads the background section. At best, your audience skips it and goes looking for something interesting; at worst, people simply toss your memo. So, instead of the background dump, only tell your audience the key facts when they need to know them.

Finally, avoid the impenetrable, intimidating page. Don’t make any single page too overwhelming. Don’t make any paragraph too dense. Don’t make any sentence too long. Design your memo to entice your audience to read it.

The design of your memo is not, however, something that you put in at the end to make it look pretty. You need to consider your design from the very beginning. Then as your thinking evolves, you need to simultaneously modify both your ideas and your design, testing whether your latest design presents your thinking best, or discovering that it exposes some weaknesses in your thinking, thus requiring that you modify your thinking — your ideas, your words, your sentences, and your design.
Of Apple’s design, Jobs notes: “People think it’s this veneer — that the designers are handed this box and told, ‘Make it look good!’ That’s not what we think design is. It’s not just what it looks like and feels like. Design is how it works.” You have to design your memo so it works — so it has influence.

Write for Your Personal Audience

“Never treat your audience as customers, always as partners.”

Jimmy Stewart

Usually, when you write a memo, you are writing it for your team, your colleagues, your partners (who may even be your friends). Yes, you may be addressing it to your boss. Or you may be drafting it for your boss to review, maybe tweak, initial, and forward to his or her boss. Still, you are a partner on the team that will, if your memo is influential, act on your ideas.

Thus, you will know your audience personally. You will know how your partners think. You will know how each of them likes to receive information. You will understand what they know and don’t know. Use this inside information to your advantage — to ensure that the content and design of your memo responds directly to your audience’s presentation preferences, current knowledge, and strategic needs.

Unless your purpose is to keep yourself out of jail, you are writing not for your own benefit but for your partner’s. What does your team want? Need? What problems does your team think it has? Actually has? Design your memo to solve one of your team’s most pressing problems:

- Maybe your partners need some basic information.
- Maybe your partners need to understand the core dilemma of a complex problem.
- Maybe your partners need to choose from a plethora of competing alternatives.
- Maybe your partners need a new, innovative management strategy.

Design your memo to answer your team’s pressing questions — to help solve a currently important problem. Yes, if you write a particularly brilliant memo (or a particularly scandalous one), it may be photocopied and widely circulated. Still, you are writing your memo not for mass circulation but for a very small, very specific, very individualized audience.

At the same time, remember that you may have a secondary audience. If your team likes your memo, someone may wish to circulate it more widely. Thus, design your memo so that it could be distributed to educate a wider audience with little or no revisions (and so that it can be leaked with little or no embarrassment).

Write for Real People, Not Bureaucrats

“Lincoln never used a two- or three-syllable word where a one-syllable word would do.”

Ted Sorensen

Make it easy for your readers to obtain the information and analysis that they seek and the insight that you possess.
Be direct. If you are too subtle — too clever — your audience may misinterpret your ideas.

Abstain from boredom. If your writing is dull, people will assume you are too.

Avoid fancy words. If you wouldn’t use a word or a phrase in an e-mail to your college roommate, don’t use it in a memo.

Make reading effortless. If your reader must wade through long, convoluted sentences, if your reader must struggle to understand the structure of your memo, if your reader can’t figure out your message, your memo is trash.

Usually, your audience for a memo is an individual (plus, perhaps, a few of his or her partners). Write for that very specific individual.

Satisfy Your Readers’ Expectations

“To improve your writing, learn how readers go about their reading. Readers know where to look for what. Learning what readers do allows a writer to control what readers learn.”

George Gopen

From his study of readers and writing, George Gopen concludes that “readers do not simply read; they interpret.” Moreover, their interpretations are driven by their expectations for the structure of what they are reading.

The people who read your memos come to the task with expectations. Satisfy them. In particular, when reading a sentence, your readers expect to find certain things in certain places.

The reader expects to find the agent of the action in the subject of the sentence. If you fail to specify who did or should do what, your audience will be confused. They will not understand how things really happened in the past, or who you think should make something happen in the future. In a policy or management memo, you need to do more than say what should happen. You have to explain who, exactly, has to do what to make that happen. You should give this who — this agent who will make happen what you want to happen — the place of honor in the subject of your sentence.

The reader expects “a grammatical subject to be followed immediately by the verb.” Don’t clutter up the space between subject and verb with several other words; move them to either before or after the subject-verb part of the sentence.

The reader expects to find the emphasis at the end of the sentence — in the “stress position.” When you write your “shitty first draft” of any sentence, you may tack a variety of phrases on to the end. You knew that these words belonged somewhere in the sentence, but you couldn’t figure out where. Still, it should be clear where they do not belong. These words do not belong at the end of the sentence. You should reserve the end of your sentence for the word or phrase that emphasizes your sentence’s big point.

The reader expects to find old information at the beginning of a sentence — in the “topic position.” This material links the sentence to what has come before and provides the context for what is about to follow.
Moreover, your readers expect you to express parallel ideas with parallel construction. For example, if you create a list of items, you should create a common format for all items in this list. If you employ a set of bullets, you should begin each bullet in the same way — for example, with the subject of the sentence that composes the bullet, or with a verb. If the first bullet is a question, the subsequent bullets should all be questions. (See the bullets above and below and Mr. Jefferson’s.)

Your readers also expect that the number of items on an initial, overview list will match the number of items on the subsequent, more detailed version of that list. For example, if, in your first paragraph, you write that your memo will focus on five specific problems, your reader expects that the rest of your memo will be organized around these same five problems — not around three problems, or six data sets, or 14 tactics.

If you satisfy your readers’ expectations, they will find it easier to recognize your brilliance.

**The Table and The Chart**

> “Much of the world these days is observed and assessed quantitatively — and well-designed graphics are far more effective than words in showing such observations.”

Edward Tufte

Sometimes, you can make your point more quickly, more clearly, more effectively, and with more detail by using a table, a chart, or some other graphic. This, however, depends not only on the nature of your ideas but also on your audience's desires. If your audience likes graphs, give them graphs. If your audience hates graphs, find a way to make your point without one.

As when you write a sentence or paragraph, first determine what message you want to send. Then select a graphic format and design it to convey — indeed, to dramatize — your message. For this purpose, a pie chart is almost always useless. Tufte writes: “A table is nearly always better than a dumb pie chart: the only worse design than a pie chart is several of them.” Just because Bill Gates has given you the ability to create a pie chart doesn’t mean that you should.

An effective graphic will pass “the photocopy test.” After all, a good graphic — just like a good memo — is apt to be photocopied and distributed. But will your graphic — without your accompanying text — be comprehensible? This is “the photocopy test”: If a graphic can be completely understood without any supplementary words, it passes this test.

Thus, for example, you should make sure that any graph you design has:

- a title that explains the point of the graph;
- the source of the data;
- clearly labeled axes; and
- two reasonable and clearly labeled scales. (Just because Bill Gates wants the tick marks at 13.47, 16.92, 20.37, . . . doesn’t mean that you should put them there.)

A graph that fails to satisfy one of these conditions, a graph that fails to pass the photocopy test, is a graph that is worse than useless. It is a graph that wastes people’s valuable time without conveying any useful information.
There Is No Such Thing As Good Writing, Only Good Rewriting

George Plimpton: “How much rewriting do you do?”

Ernest Hemingway: “It depends. I rewrote the ending to *Farewell to Arms*, the last page of it, thirty-nine times before I was satisfied.”

Plimpton: “Was there some technical problem there? What was it that had stumped you?”

Hemingway: “Getting the words right.”

Getting the words right. This requires rewriting. And rewriting. And then more rewriting.

You need to get your words right, because your audience will only read so much. Maybe this limit is five pages. Maybe it is only one page. Regardless of this limit, you will be pressed to live within its constraints — to include all of your absolutely essential ideas without violating your audience's patience. This requires rewriting.

Unfortunately, this rewriting is work. It takes time. As Blaise Pascal wrote to a friend, “I have made this letter longer than usual because I lack the time to make it shorter.”

Still, it usually makes sense to write long and edit. Start with a big brain dump — with all of the many ideas that you would like to make. Then, realizing that your audience won't possibly read all of this stuff, you will need to cut.

But how? “How can I possibly delete any of my absolutely essential ideas and captivatingly clever words without which a reader will never understand the sophistication of my thinking?”

To the rescue rides William Strunk: “Omit needless words. Omit needless words. Omit needless words,” he told generations of literary gluttons. Ignore this advice at your peril. Follow it, and it will help you rewrite to your audience’s satisfaction. Still, this advice is difficult to implement. It requires you to ruthlessly purge your most cherished words. Fortunately, for this task, George Orwell provides a useful rule: “If it is possible to cut out a word, always cut it out.”

The first candidate for the hatchet is the phrase “going forward.” I have yet to encounter a sentence in which these two words eliminated any ambiguity.

Another is the last sentence. David S. Mundel argues: “If one need to shorten a memorandum, the last sentence ought to be removed, unless this sentence is very important. And if this sentence is this important, it should generally not be the last sentence.”

You can examine any policy topic in a multiplicity of lengths. About any subject, you can write a 700-page encyclopedia or a 700-word op-ed piece. So before you start to write your memo, you have to determine how long (at least, approximately) it can be.

Are you charged with writing a lean, one-page memo? If so write an opulent, two-page draft. Then get brutal. Lop off sentences. Discard words. Rearrange paragraphs. And then, having pared your literary masterpiece down to one page and four lines, don’t mess with the font. You’ll be tempted. Don’t. Don’t engage in the all-too-obvious trick of reducing the font size until those four lines are all absorbed onto page one (and the resulting words are indistinguishable from ancient microglyphics).

This is when you earn your memo-writing laurels. This is when you combine literary brutality and intellectual honesty. This is when you put your draft aside for an hour or a day (or even a week) and return to it fresh — prepared to recognize how you can rewrite it one more time to be even more...
concise and simultaneously more clear. This is when you are forced to decide what is really essential and what can be held in reserve for the second edition.

For the last — but strictly implicit — sentence of every memo that you will ever write is:

“If you think these thoughts are useful, I have some even better ideas.”

Notes


2. But always subject to multiple rewritings.


   Levitt also observed: “Ideas are useless unless used. The proof of their values is their implementation. Until then, they are in limbo.” Theodore Levitt, Ted Levitt on Marketing (Boston, Mass.: Harvard Business School Publishing, 2006), p. 179.

6. A philosophical (and scientific) question: “If a tree falls in a forest, and no animal is there to hear it, did it make a sound?”

   A practical question: “If a memo is written, and no one reads it, did it have an impact?”

   For both questions, the answer is clearly “no.”

   Over 125 years ago, a reader of Scientific American (identified only as “S.A.H.”) wrote to ask: “If a tree were to fall on an uninhabited island, would there be any sound?” Here is how Scientific American responded:

   “Sound is vibration, transmitted to our senses through the mechanism of the ear, and recognized as sound only at our nerve centers. The falling of the tree or any other disturbance will produce vibration of the air. If there be no ears to hear, there will be no sound. The effect of the transmission of the vibrations upon surrounding objects will be the same, with or without the presence of sentient conditions for recognizing them. Hence there will be vibration but no sound to the things that cannot hear.” Scientific American, vol. 50, no. 4 (April 5, 1884), p. 218.


10. For a egregious examples of how writers in foundations (and all other organizations) employ jargon to avoid the serious and challenging work of thinking, see:


If you fail to laugh out loud while reading any of these short books, you have no sense of irony.


15. For an example of how to do this well — of how to introduce key information just when the audience needs to know it — see Tracy Kidder’s Pulitzer-Prize-winning book, *The Soul of a New Machine* (Boston: Little-Brown, 1981).


18. If your secondary audience does not know things that your primary audience does, you may want to attach an appendix containing this information.


   Winston Churchill: “Short words are best and the old words when short are best of all.”

   George Orwell: “Never use a long word where a short word will do.”
The Economist: “Short words: Use them. They are often Anglo-Saxon rather than Latin in origin. They are easy to spell and easy to understand. Thus prefer about to approximately, after to following, let to permit, but to however, use to utilise, make to manufacture, plant to facility, take part to participate, set up to establish, enough to sufficient, show to demonstrate and so on.”

From the style guide of The Economist, which contains lots of other useful advice:
http://www.economist.com/research/styleGuide/


22. This expectation of readers explains why your eighth-grade English teacher kept telling you to avoid the passive voice. The passive voice usually leaves out the agent; if it includes one, this agent is not in the subject.

Recall: “Mistakes were made.” Public figures employ this politically convenient sentence precisely because the passive voice obscures who made these mistakes.

William Safire calls these three words “a passive-evasive way of acknowledging error while distancing the speaker from responsibility for it.” For this phrase, the political commentator William Schneider invented a new tense: the “past exonerative.” Safire’s Political Dictionary (New York: Oxford University Press, 2008), p. 431.


24. A useful writing guide is Anne Lamott, Bird by Bird: Some Instructions on Writing and Life (New York: Anchor Books, 1994). See particularly pp. 21-27, where she explains the necessity of writing “shitty first drafts” that, of course, only you will ever see.

25. In the Declaration of Independence, Thomas Jefferson consciously used parallel construction to indict King George III:

He has refused his Assent to Laws, the most wholesome and necessary for the public good.

He has forbidden his Governors to pass Laws of immediate and pressing importance, unless suspended in their operation till his Assent should be obtained; and when so suspended, he has utterly neglected to attend to them.

He has refused to pass other Laws for the accommodation of large districts of people, unless those people would relinquish the right of Representation in the Legislature, a right inestimable to them and formidable to tyrants only.

He has called together legislative bodies at places unusual, uncomfortable, and distant from the depository of their public Records, for the sole purpose of fatiguing them into compliance with his measures. [Italics added.]

If you are a better writer than Jefferson, you can ignore your readers’ expectation for parallel construction. If, however, your writing has yet to rise to Jefferson’s level, you would benefit from adopting his practice.

27. Tufte, p. 178.


30. I wrote the first version of “The Craft of Memo Writing” years ago. Since then, I have rewritten, and rewritten, and rewritten it. Yet, when I sat down in January 2011 to rewrite and redesign yet another version, it took me two-and-a-half days. For this edition, I devoted only a long evening.

31. “Je n’ai fait celle-ci plus longue parce que je n’ai pas eu le loisir de la faire plus courte.” Blaise Pascal, Lettres Provinciales, 16 (1657).

32. I actually find it easier to cut my apparently essential ideas than my clever words. My ideas may not be original, but my words are. They are my babies. How can I cut my babies?


If you have, somehow, escaped from every bookstore you ever entered without purchasing this invaluable little book, you should immediately invest $10 in this 85-page literary instructor and place it on your desk right between your thesaurus and The Bill James Handbook 2017. It will help you become a better memo writer, a better pen pal, and a clearer thinker.

Strunk & White’s guidance is shared by Isaac Babel, the Russian journalist, playwright, and short-story writer: “Your language becomes clear and strong, not when you can no longer add a sentence, but when you can no longer take away from it.” Quoted by John Updike, “Hide-and-seek: the Complete Isaac Babel,” The New Yorker (November 5, 2001), 91.


35. For an attack on “this inanity,” see: Mark Seacombe, “Going forward, let’s consign this inane phrase to history,” The Guardian, August 30, 2011.


37. In the first set of memos that I get in every course, I can draw a line through two (or five) words in every memo without affecting the sentence’s and memo’s meaning.

38. Please note: This sentence is strictly implicit. The reader knows this. Yet, more than once, students have taken this point literally and actually put this sentence at the bottom of the last page.