

Writing Briefing Memos
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Welcome to this lecture on writing briefing memos.

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What is a briefing memo, and why would you write one?

Let's start by talking about what a briefing memo is and why you would want to write one. Well, chances are you will have been asked to write a memo by a boss or a client or maybe as part of some work you're doing with a workgroup, a task force, or board of directors --you need to summarize some information, update them, or you know, convey some kind of information that needs to be organized in a written document. So, usually a briefing memo would be written to inform decision-making in some kind of general sense. So you might be providing background or synthesis. You might be trying to help the recipient or recipients understand a complex problem; or maybe you're identifying implications of new information. So you might call this document an administrative memo or a policy briefing memo, or some other name, but for our purposes today were just going to call them briefing memos.

What is a briefing memo, and why would you write one? Could be written for a boss, client, work group, committee, board of directors, etc. To inform decision-making. To provide background or synthesis. To help understand a complex problem. To identify implications of new information

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What do you need to know before you start?

There are several types of things you need to think about before you start writing your memo. And the first sounds obvious -- why you were writing the memo -- but in fact, sometimes we forget in the course of writing a document, what we're trying to achieve. So, before you sit down to write your memo always take some time to think about, in very concrete terms, what you're trying to achieve with this communication tool. And doing that will help you edit it down to the essentials, and it will help you structure the memo to lead the reader toward your goal. It also could help to think about what ultimately the recipient is trying to achieve, whether that's your boss, an agency, a workgroup, etc. So, some examples of reasons you might be writing this memo would be -- maybe our bosses asked you to

summarize an article that might be of interest to the program you work for, or maybe you want to update the members of a group you are facilitating or participating in to inform them about decisions that the group has made or provide information that will help them make decisions in the future. You might be providing talking points to defend a decision that somebody has already made. Or, maybe you're analyzing the effects of a new law on current procedures or policy. There are, you know, so many different reasons, but the point here is just to be very crystal clear about what you're trying to achieve before you even start writing. Another thing to think about is the recipient's existing knowledge of the issue you're writing about or of any scientific or technical aspects of the topic of the memo, so think about whether the recipient or the group your writing to are experts or maybe they are educated non-specialists. What kind of knowledge of or exposure to background information about this do they already have? So, you know, you don't want to bury other important points under background information that the reader doesn't need. And then finally, are there factors other than science that affect the agencies or the group's actions? Know the relevant priorities and strategies of the agency or group, whether they are political and organizational, issues of culture or context or constraints that they might be under. All of this will help you tailor the type of background information you include and it also could help you identify implications or if you're making actual recommendations you'll need to know how your recommendations fit in with the overall priorities mandates vision etc of the agency you work for, the program you're writing about.

What do you need to know before you start? Why you're writing the memo. Recipient's existing knowledge. Factors other than science that affect the agency's actions. Agency priorities and strategies. Bureaucratic constraints. Political context.

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What could possibly go wrong?

So far this sounds pretty easy right? I mean, it's just a memo. What could possibly go wrong? Well, writing in memo may be easy, but writing an effective memo often isn't. There are some common pitfalls and will discuss them now using a framework that may be familiar to you.

What could possibly go wrong?

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What could possibly go wrong?

IKEA. Think about how you feel after you've been shopping at Ikea. What could possibly go wrong?
IKEA

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The IKEA® Effect

Ikea stores are purposely designed with a winding circuitous path so that you will see every single item in the store. Now, the reader of the memo doesn't want to see every single item. The reader can close your email or put your memo at the bottom of a stack of papers or even in the recycling bin. The Ikea shopper is not so lucky since she is trapped in the middle of the warehouse she has no idea what direction she came from or how to get to the exit. When she finally does get to the exit after wandering aimlessly maybe for 40 days and 40 nights surviving only on mana with lingonberry sauce, she encounters 900 additional products before reaching the cashier. So let's take each of these elements of the Ikea effect and talk about how we can avoid them in our writing.

The IKEA® Effect. Circuitous path: From the middle, neither the beginning nor end are visible. Make sure they forget why they came (come for a light bulb, leave with a bedroom suite!) Show every visitor every item in the store. Shortcuts to the exit are hidden. New, imperative merchandise at the end!

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IKEA® Problem: Circuitous path

So the first Ikea problem: the circuitous path. The solution is to sequence your ideas for a logical and linear flow. And the sequence should be thought of, sort of, overall for your memo, so from the beginning of your memo to the conclusion, but also within each paragraph. Paragraph should have a direction, they should have a strong active statement that is backed up with a level of evidence in context and appropriate both to the recipient and to the purpose of the memo. And then paragraphs and sections should flow logically from one to the other.

Solution: Sequence ideas for a logical, linear flow. Each paragraph has a direction. Paragraphs and sections flow logically from one to another. IKEA® Problem: Circuitous path

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IKEA® Problem: Lost in the middle.

Getting lost in the middle. With your memo you'll want to set up a whole path of the beginning and stick to it. So make sure that your first paragraph includes both the purpose and the conclusion. Remind the reader why you're writing the memo. Say why a decision is needed or why the issue is important now. And then give away the ending.

IKEA® Problem: Lost in the middle Solution: Set out the whole path at the beginning, and stick to it. First paragraph includes purpose and conclusion. Remind reader why you are writing the memo. Say why a decision is needed or why the issue is important now. Give away the ending

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IKEA® Problem: Why did I come here?

Why did I come here? The Ikea problem of forgetting why are there. In your memo every paragraph should relate to that purpose. Don't offer the reader a light bulb and then send them away with a bedroom suite. So, as an example you'll probably follow your first paragraph with some kind of background information. And the amount type of background information will depend on the purpose of the memo as well as the recipient's existing knowledge. So depending on the purpose of the memo the background information might include why the issue is important, prior research on the topic, or maybe past actions of the agency, but even within this background information that is just providing context for the rest of your memo, it needs to be selected to relate specifically to your purpose.

Solution: Every paragraph relates to the purpose. IKEA® Problem: Why did I come here?

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IKEA® Problem: Seeing every item

Seeing every item. Well the obvious solution here is to include only what is necessary in your memo. Now, this brings me to talking a little bit about another use of the phrase "the Ikea effect." The economic field uses the "Ikea effect" in a slightly different way that I have here, but it's also relevant to our discussion. In the economics and business literature, "the Ikea effect" refers to the way that people assign greater value to things that they've put effort into themselves. So, if you bought a cheaply made of plywood end table, you wouldn't think it was worth much. But if you buy the same cheaply made plywood end table but you struggled for 2 hours to assemble it yourself, like you might if you bought it at Ikea, you would probably think that it was worth a lot more. Apparently research has borne out this phenomenon. So, we can see this in writing; we fall into the same kind of trap. If you've worked are for 2 hours writing something it's worth a lot more to you than if you just scrawled on the back of a piece of junk mail in 2 minutes and it's really hard to delete text that we've struggle over, but that's precisely what you have to do to be a good writer and an effective communicator. So include only at what is necessary. I recommend never editing the same day that you've written a piece. Put it aside and come back to it with fresh eyes and when the effort that you put into each sentence is no longer are as fresh then you can revisit every word sentence and paragraph to streamline and prune.

If you done any gardening you know that there are certain plants that need to be cut that drastically in order to thrive the next year and that's exactly the kind of thing that you need to do with your writing.

Solution: Include only what's necessary. IKEA® Problem: Seeing every item

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Write clearly and concisely.

Part of the solution here is to write clearly and concisely. Avoid jargon and use short direct sentences. So when you go back to edit look at your memo line by line and make sure that your sentences are specific and concrete, that they use the active voice and simplifies sentence structure. Don't put too many phrases in a single sentence. And each center and should have a single purpose. It should be easy to identify the subject and verb for each sentence. Some go through, cut extra words, shorten words, and look for where you've turned verbs into nouns and see if you can rewrite for a greater sense of agency and action.

Write clearly and concisely. Avoid jargon. Use active voice. Simplify sentence structure.

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Present data effectively.

When you include data in a memo you need to be just as mindful of all these pitfalls, so whether you're providing statistics about a health issue as background, or reporting the results of a research study, the data are just as important for conveying your main points. Only report the essential data. Include the data that are necessary either for background or to help move your argument along. So if you are summarizing research articles you don't have to report every single finding, just the ones that are relevant for the purpose of the memo. And this gets back again to really understanding the purpose of the memo, the information needs of the recipient, and what you're trying to achieve. Your presentation of data should be just as clear and concise is your writing. If the data are important enough to include in the memo they should be made easy to understand remember. And finally, remember the findings are the same as implications, so when you presented in a memo you should be providing a sequence of information with a logical path. If the research shows "x", what are the implications of that finding for the population you serve, for example. And given those implications, what changes might your agency or organization consider.

Present data effectively. Use understandable language. Relate to purpose of memo. Identify implications.

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IKEA® Problem: Shortcuts are hidden.

OK let's go back to our Ikea problems. The problem of shortcuts being hidden. We talked about sequencing and streamlining to help the reader follow the text, but visual cues are also important especially if the memo is a text any format so make the structure the memo clear to the reader and organize your argument and format it so that it is visually clear. Use plain white space, paragraph breaks, and informative headings that tell at a glance what's in each section. And finally, draw attention to your main points so the reader doesn't miss them. You can use bold font or bulleted lists, text boxes, that kind of thing, but don't draw attention to your main points by screaming them to the reader with your word choices. So think about this: at Ikea, they don't have to put up a big sign with bold red font that says "you have to buy this candle holder or the rest your life will be miserable." They just put the pretty candle holder in a lovely display that represent somebody's chic living room, and you come to the conclusion yourself that the rest of your life is going to be miserable if you don't have that candle holder. It's kind of subtle.

Solution: Provide visual cues. White space. Paragraph breaks. Informative headings. Draw attention to main points. IKEA® Problem: Shortcuts are hidden.

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Be credible and professional.

So, in the context of memo writing, it's about being credible and professional; taking yourself out of the argument. Let the facts speak for themselves. If you have a compelling argument they will. And since this is an analysis not an infomercial, you need to avoid emotional arguments and fluffy language. So, for instance, you don't need to say "the consequences cannot be overstated" or "a crisis unlike any of this state has ever seen before." Again, just let the facts speak for themselves. And avoid using "I statements" unless they are really necessary. So there are some cases in which she might use phrases like "I recommend" or "I have concluded that the wisest course of action in is..." but in most cases if you don't need to use "I statements" then you shouldn't. And then finally, write for the recipient but assume that others will read it. So, I think this is the "reply all" test. You really can't assume that only your boss or the recipient will read it. Don't write anything that might embarrass you, your boss, or the agency if it gets into other hands.

Be credible and professional. Take yourself out of the argument. Avoid emotional arguments and "fluffy" language. Let the facts speak for themselves. Use "I" statements judiciously. Write for the recipient, but assume others will read it (the "reply all" test)

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IKEA® Problem: New stuff at the end.

The final element in the Ikea effect is finding new stuff at the end. The conclusion of your memo should relate to that body of the document and should reiterate the main points that you want a reader to remember without introducing new information. If there's some specific action required or suggested then mention that, and then offer to be available for any follow-up questions or additional information and provide your contact information.

Solution: No new information in the conclusion. Reiterate the main point. Mention any specific action needed. Offer to be available for follow-up questions. IKEA® Problem: New stuff at the end

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With that in mind here's our contact information. We invite you to check out our website for more information and to find additional professional development resources. Thanks for joining us. Women's and Children's Health Policy Center. Department of Population, Family and Reproductive Health. Johns Hopkins Bloomberg School of Public Health 615 N. Wolfe Street. Baltimore, MD 21205. Tel: 410-502-5450. www.jhsph.edu/wchpc. This lecture and accompanying materials were developed with the support of the MCHB/HRSA Maternal and Child Health Training Grant T76 MC 00003.