



Brief Guidelines for Writing Action Memoranda

1. Incentive:

Let your boss know why he or she should be concerned with this issue at this time. Why is this on his or her desk now? Why can't it wait?

2. Assumptions:

Specify broad assumptions that frame the memo. Why are some things in or out of the memo? "Assuming our current policy...." "Assuming Congress would not...."

3. Options:

Present clear choice of options. Make sure all major options are considered, but avoid clutter of irrelevant options (justify way some are not elaborated). Identify sub-options so that decision makers can quickly observe how they differ. Some simplification is essential, but it needs justification beyond sandwiching a preferred option between formal alternatives. Beware of bureaucratic tendencies to trade away options in advance and present lowest common denominators.

4. Context:

How does this issue relate to other issues currently under consideration? Would the options look different if the context were presented differently?

5. Fallbacks:

Remember Murphy's law and prepare your boss for the worst. Identify the costs if a preferred option fails. What are the fallbacks? Will the wrong sequence of actions close off some fallbacks? Beware of letting the best (your preferred option) destroy the good (a less desirable but more attainable option).

6. Probabilities:

Describe the probabilities that the cost and benefits of various options will be realized. How sensitive are they to changes in various assumptions? If some larger framework changes, would the probabilities (and weighting of the issues) change significantly?

7. Time Horizon:

Action memos must focus on the specific issue at hand, but action-forcing events often provide opportunities to direct attention to longer term issues. A good memo writer often can put the immediate issue into a longer term framework.

8. Brevity:

Be brief. Your memo is one of many on a crowded desk. Avoid telling your boss what (s)he already knows. Avoid overly elaborate analysis and temptations to show off technical skills. (Use appendices if necessary.)

9. Bias:

You often cannot avoid having a personal or bureau point of view, but you can avoid slanting the assumptions or options. Your expression of your preferences will be more credible if it is openly disclosed and if you have fully and adequately presented alternative views.

10. Leaks:

Memos often receive wider distribution than their authors intend. While frankness is important, as authors choose their words, they should imagine how they might appear in print.

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