

3 LAST TO BE WRITTEN, FIRST TO BE READ: WRITING MEMOS, ABSTRACTS AND EXECUTIVE SUMMARIES

K. Alex Ilyasova

So, you've had writing assignments before, probably ones where you had to compare and contrast something or a few things, or where you wrote a story/narrative.¹ And possibly a few where you've even had to write a research paper on a specific topic. You've maybe even had to write an argumentative paper at some point on some issue or topic as well. But now you're in a business writing class or a technical writing class, and things feel different. You now have to write a report. Not only do you have to write a report, but you also have to write these other parts of what seem to be pieces that go alongside the report, such as memos, and even smaller pieces like summaries and abstracts, that you might never have had to do in previous writing assignments. Where do you start? How do you know you did them well? And why do you need to write all those other pieces anyways?

What follows is a series of practical guidelines that help you understand the *why* and the *how* for three specific pieces of writing that often accompany reports and other professional and technical writing assignments. These three pieces of writing are cover memos, executive summaries, and abstracts. As you read the guidelines, you'll come away understanding the goal, purpose or why of each piece of writing, the definition, and what aspects make each effective. Along the way, we'll apply some of these guidelines to actual examples. You'll also be able to get into the heads of other writers as they formulate their own approaches to how they write these specific pieces/assignments.

¹ This work is licensed under the Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License (CC BY-NC-ND 4.0) and is subject to the Writing Spaces Terms of Use. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-nd/4.0/>, email info@creativecommons.org, or send a letter to Creative Commons, PO Box 1866, Mountain View, CA 94042, USA. To view the Writing Spaces Terms of Use, visit <http://writingspaces.org/terms-of-use>.

Lastly, one of the things these types of writings have in common is that they are often the last thing you write after you complete a phase of a project or the writing of a report, but they are one of the first things to be read by your supervisor, client, or other decision maker. As a result, in order to write these well you need to know and often to have completed a project or phase, or the report itself before you write these well, concisely, and persuasively. As you read through the guidelines for each type of writing, it will make sense about why these are written last.

GUIDELINES FOR WRITING COVER MEMOS

Cover memos are a specific kind of memo that provide information about projects, tasks, and/or decisions to be made. These differ from more general memos in that they either accompany a report or reference a stage of a project. With this in mind, let's begin by looking at writing cover memos. To do so, we'll focus on three factors:

- Why we write cover memos or the purpose.
- What questions to answer/think about before you start.
- What are the main parts to include.

The objective of this process is to help you articulate information about project updates or completion, ongoing and/or completed tasks, decisions from important meetings, and/or short proposals that either you are working on by yourself or with a team.

WHY WE WRITE COVER MEMOS

To understand why we write cover memos, let's look at an example of one in Figure 3.1 and examine the following three aspects:

- **The content:** what is the topic or what does the memo discuss?
- **Parts:** what are the main sections of a memo? See if you can identify the four main sections—header, introduction, body, and conclusion.
- **Format:** how the information is presented (e.g., font type and size, how is the information arranged, length, etc.).

Additionally, see if you can tell whether or not this memo was for inside or outside of an organization, and the levels of formality and importance conveyed in the memo. Lastly, think about when you would write such a memo before or after you have completed a report?

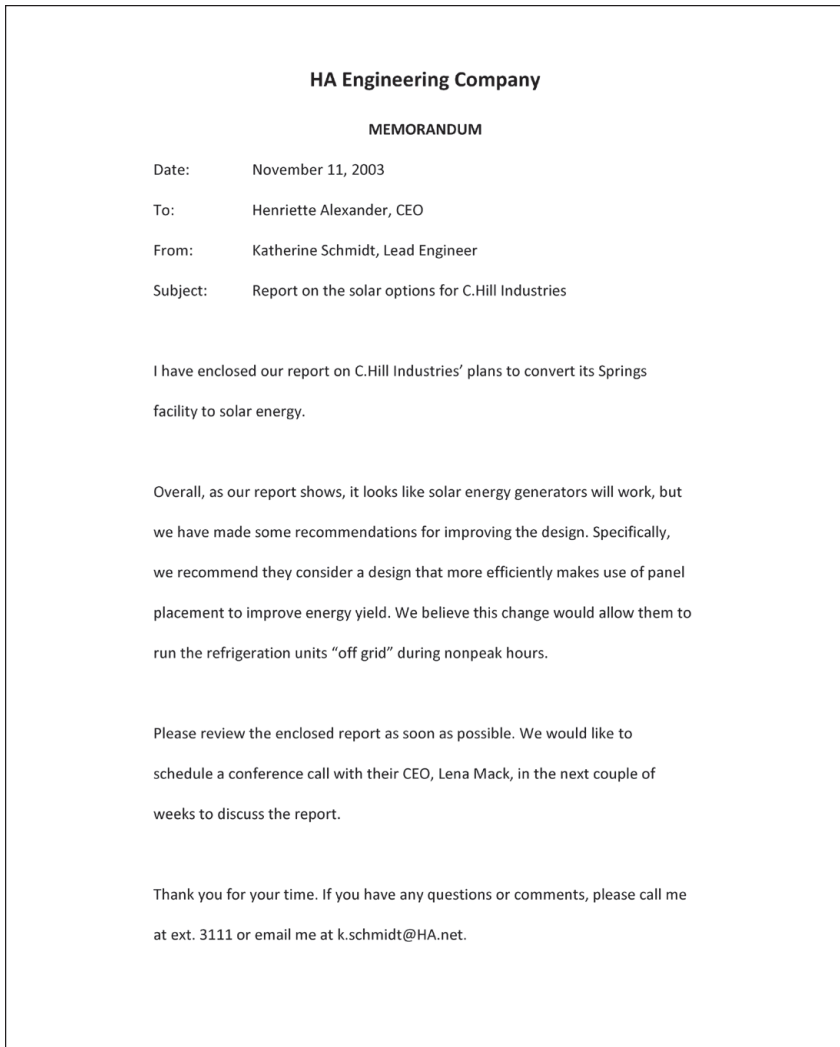


Figure 3.1. Memos are basically the same in structure as emails.

The first thing you might notice with the content is that the memo is written to someone inside the company or organization. This memo lets the reader know that a report accompanies it, and what the report is about. What this means is that you should write this kind of cover memo *after* your report is done. Cover memos contain information about project updates or completion, ongoing and/or completed tasks, decisions from important meetings, and shorts proposals that either you are working on by yourself or with a team.

One question students have about memos is what the difference is between them and sending emails. As you might have noticed, the formatting is quite similar (both share similar basic features: TO, FROM, SUBJECT, and a MESSAGE). However, the spread-ability or reach are the main differences between memos and emails. Emails can be sent instantaneously to many people by one person, memos have less reach or spread since they need to be printed on paper and delivered to one person or a few individuals. Usually, the reach or spread is determined by whether the email or memo is for someone outside or inside your organization. In today's workplace, emails have replaced memos as the quickest way to communicate *informal* messages, particularly to people inside your organization. For people outside the organization, emails are more often expected to have a higher level of formality. In other words, the differences between emails and memos are dependent on audience and purpose.

Memos, on the other hand, are typically more formal, taken more seriously, and as a result tend to be less likely to go unread or dismissed when they arrive on someone's desk. Receiving a paper memo signals that the message is too important or too proprietary to be sent via email. For example, you should probably write a memo if you include financial data, product research and development details, marketing strategies, basically any information that a company owns and/or does not want to share publicly.

Despite these differences, memos and emails share many of the same basic formatting features, and content. As you can see in the previous example, the main format features of a memo include:

- Header
- Introduction
- Body
- Conclusion.

Each section is key, for readers rely on such information to understand what is being asked of them and how urgent the information or request is in taking the next step.

BEFORE YOU START TO WRITE

Because of the reach, formality, and importance associated with memos, when you begin writing the various sections, you should take some time to consider your readers and how they will use this information. Because memos are meant to quickly convey information, attention should be paid

to include only relevant information. In other words, doing some planning and research will help ensure that you come off as a professional and that you include only need-to-know information.

Here are the 5Ws and How Questions to work through before you get started:

- Who is your reader? (Some examples include your boss/supervisor, a co-worker/team member, or a client.)
- Why are you writing to them? (Some reasons include because another phase of a project is complete, you've encountered a problem/opportunity, or you need something to continue.)
- What is your main point or what do you want your reader to do with this information? (Some examples, you are providing an update and no action is needed, you encountered a problem/opportunity and need to meet to discuss next steps, or you need something and are asking for approval.)
- Where and when will my memo be read? (In other words, what is the context in which your memo is read—for example, the physical, economic, political, and/or ethical factors that might influence how your reader interprets and responds to your memo? Or more specifically, what are the concerns of your reader as they read your memo?)
- How will the reader use this document in the future? (For example, will your memo be shared with others? Will it be filed/kept, and if so, by who/where? In other words, memos might turn up in unexpected/unintended places and so thinking about the public aspect of your memo and how it represents you and your work can help you make decisions about what you include, and how you state your message.)

Answering these questions is an important pre-writing step because it will help you be clear on your purpose, audience, and main point(s), and provide you with the basic outline before you start writing. This planning is not difficult, and most students tend to vaguely know the answers as they write, but since going through these questions will typically take only a handful of minutes, answering them before you start is useful in helping you be explicit and clear before you start about who you're writing to, why you're writing, and what your readers need to know.

Once you have answered these questions, you might consider having these answers handy and referring back to them to make sure you are staying on track as you write your memo.

WRITING THE MEMO

Now that you have a clearer idea about who you're writing to and why you're writing, it's time to organize and draft your memo. As with most writing tasks, some memos will require more time and care to develop than others. However, as you get more familiar with this type of writing and gain more practice, writing memos will become easier and just another part of the flow of your workday. Part of what will help you get better at this writing task is understanding that some parts of the memo make predictable moves regardless of your purpose. Specifically,

- the *header* features the DATE, TO, FROM, and SUBJECT;
- the *introduction* introduces and sets up the topic of the memo; and
- the *conclusion* repeats make points for the reader.

Keeping this in mind and recalling what these moves include will allow you to spend more time on what you need to develop clearly and concisely—the body of the memo. Finally, memos are often one-two pages in length so that they can be read quickly, with only the most pertinent information included.

HEADER

Let's first take a look at the header and introduction (see Figure 3.2) and identify the predictable moves in each. In the header, there are two moves to get right. First, getting the features of the header correct, and second, having a clear and concise subject line (see Figure 3.2). The header must have the DATE, TO, FROM, and SUBJECT, in that order, and ideally, formatted so that the information in each line is aligned the same. Additionally, for memos, your initials must appear at the end of your name in the FROM line. (Side note: unlike letters, memos are NOT signed at the bottom. Instead, memos are initialed at the top, next to the name of the person who wrote the memo).

Lastly, with the SUBJECT line, you should offer a descriptive and specific phrase that describes the content of the memo. Simply writing, "Project" or "Update" is too vague. None of us like reading an email with a non-descript or boring title, and we likely skip over it since it might seem unimportant. Most readers look to the subject line first to determine if they want to read the memo and/or when to read the memo depending on the SUBJECT line. Giving more specific information, such as "Update on Project Springs" or "Accident at District #4" helps a reader make that decision.

INTRODUCTION

In the introduction (see Figure 3.2, first paragraph) you should make at least three of the moves listed here, depending on your reader and your purpose:

1. Identify the subject of the memo. (What the memo is about.)
2. State the purpose. (Why you are writing the memo and why the reader is reading it.)
3. State your main point. (What are the key ideas you want readers to remember in the memo?)
4. Offer some background information, depending on how much your reader needs to or already knows. (Provide them with the information needed to understand each main point in relation to the overall subject.)
5. Stress the importance of the subject, depending on how critical it is to act on your message/point. (Explain why the reader needs to know this information and what the reader needs to do with this information after reading the memo.)

Your *subject* and *purpose* should be stated within the first two to three sentences of your introduction in order to reduce how long it takes for your reader to know what the memo is about. Tell your reader, up front, what you are writing about. Do not assume that your reader will know just from the SUBJECT line or because they are expecting a memo from you. Followed by your *subject* and *purpose* is your *main point*, or the action you want your reader to take. You need to have all three of these moves in the first paragraph or introduction in the memo, see Figure 3.2.

As you might have noticed, the introduction (first paragraph) of the memo in Figure 3.2 also includes some background information, very brief, one sentence, “Last week, the Director’s Board . . .” about where this idea came from. The writer also stresses the urgency or importance in addressing this concern “as soon as possible”. In some cases, providing the background makes receiving the memo less confusing, and stressing the importance is warranted given the situation. Both of these moves are ones you will need to determine depending on the situation, however, moves 1, 2, and 3 are always required.

BODY: THE DETAILS

The body of the memo (see Figure 3.2) is where you provide your readers with the information they need to make a decision or take action. The body of the memo is often the largest part, and often takes up multiple paragraphs. This is where you develop your points by providing facts, examples,

data, and/or reasoning for the decision or action you want taken. Referring back to the answers to the 5W and How Questions about why are you writing, what is your main point and what do you want your reader to do with this information at this point? Once you've done that, what information do you need to provide your reader for you to achieve your purpose?

As you begin writing, divide the *subject* of the memo into two to five major topics or points you want to discuss further with your reader. For example, in Figure 3.2 there are two main topics discussed—the current situation and a draft of the plan to discuss further. Each one is followed with some reasoning, facts, data or examples. In Figure 3.2, the current situation is stated directly and right away, along with the reasoning, (current situation stated clearly) “Despite our current situation of no one testing positive during the pandemic, strict mask requirements, and sanitizing procedures, (the reasoning starts here) the possibility still exists that the COVID-19 virus could be contracted by our employees and spread among our factory workers.” Immediately next is a fact, from a trustworthy source that helps supports the reasoning, “The World Health Organization reported in February 2020 that asymptomatic individuals can spread the virus. In these cases, one asymptomatic individual can infect our factory floor employees pretty quickly.”

Following this is the start of the next topic: draft of a plan. Your reader will expect clear reasoning and details in this section as well. For example, the section begins with the topics of this section and clear reasoning, “To help make sure everyone stays safe, informed and adhering to safety orders (the reasoning), we recommend the development of a contact-tracing plan (the topic of the section) for our company and workers.” Lastly, the details or actions to take are also provided, “1. Develop a decision tree. . . . 2. Design an alert system. . . . 3. Connect with local health authorities. . . .”

When you include these elements—facts, examples, data, reasoning, actions—in a well-organized and clear way, you help your reader understand what you're asking of them and why.

Take your time with this section since it will provide the needed details to help your reader take action.

CONCLUSION

Finally, you're at the conclusion. The conclusion should be short, and like the rest of the memo, to the point (see Figure 3.2). Typically, you are looking at no more than three sentences, and nothing essential should be in the conclusion that hasn't already been stated in either the introduction or the body. As mentioned earlier, the conclusion is another place that has specific moves you can do quickly once you know them. These moves are:

1. Thank your reader: tell them you appreciate their attention.
2. Restate your main point: remind your reader of what you want them to do.
3. What’s next: end with next steps and looking forward in some way.

Each of these moves is important because they meet the expectations of the reader. These expectations include indicating that the memo is concluding (“Thank you for your attention to this important matter,” reminding the reader of the topic or urgency of the matter “I believe a contact-tracing plan should be developed as soon as possible,” and providing contact information and a clear request for what is the next step, “To get started, I would like to schedule an appointment . . . you or your assistant can reach me at ext.19 . . .”).

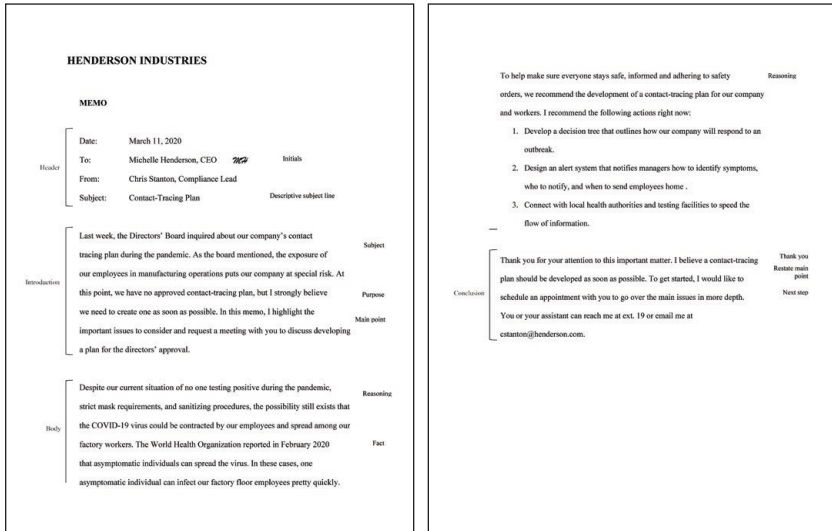


Figure 3.2. This memo shows the main parts and moves of the correspondence. The header indicates the subject of the memo; the introduction sets up the subject, purpose, and main point; the body provides the details; and the conclusion restates the main point and/or provides next steps.

GUIDELINES FOR WRITING ABSTRACTS AND EXECUTIVE SUMMARIES

Next, let’s review the process of writing abstracts and executive summaries. To examine these kinds of writing, we’ll focus on three factors:

- Why we write abstracts or executive summaries,

- What to do before you write your abstract or executive summary, and
- What are the parts to an abstract or executive summary.

The objective of this process is to learn how to provide a brief and clear overview of an entire report without having your reader read the report itself.

WHY WE WRITE ABSTRACTS AND EXECUTIVE SUMMARIES

One of the writing assignments you will likely encounter in technical communication is report writing. And at some point, you will be tasked to write the front matter for a report, which will include either an abstract or an executive summary. Both the abstract and the executive summary are designed to provide a brief and clear overview of the entire report without having your reader read the report itself. Like most writing in technical communication, the goal is to provide clear and concise information quickly. That's what abstracts and executive summaries need to do well when accompanying a report—to inform readers about what they are about to read in the report.

BEFORE YOU START: ABSTRACTS VERSUS EXECUTIVE SUMMARIES

As you might have already figured out, you can only write these abstracts and executive summaries once you have finished your report. Because both the abstracts and executive summaries reflect the complete content of your report, you must be done with your report in order to accurately reflect its content in either the abstract or the executive summary. Moreover, as you have also figured out by now, these pieces of writing will be the first things your readers will read in order to decide 1) if they want to read the rest of the report and/or 2) if they can make a decision based on the information in just the abstract or the executive summary. In other words, take your time drafting these as it will determine whether your reader proceeds with reading your report. Even though they are short or shorter than the report itself, abstract/executive summaries are the first impression readers will have about you, your work and professionalism, so they are quite crucial.

Table 3.1 provides some quick differences to keep in mind between abstracts and executive summaries.

Finally, before you get started drafting either an abstract or executive summary it is a good idea to do the following four steps as outlined by Purdue Online Writing Lab (see <https://tinyurl.com/5n8za6bt>).

Table 3.1. Abstracts Versus Executive Summaries

	Abstracts	Executive Summaries
Length	Typically about one robust paragraph.	Often about one page maximum.
Types	Two types: informative and descriptive. The descriptive does NOT include results, conclusions, or recommendations.	Only one type.
Order	Follows the organization of the report.	Does NOT follow the organization of the report.
Phrasing	Uses the phrasing in the report	Does NOT use the exact phrasing of the report.

Reread your report with the purpose of abstracting in mind. Look specifically for these main parts: purpose, methods, scope, results, conclusions, and recommendations. You might even want to mark your report so you can find those places once you start writing.

After you have finished rereading your report, write a rough draft without looking back at your report. Do not merely copy key sentences from your report. You will put in too much or too little information. Also, do not summarize information in a new way—no new information goes into either the abstract or executive summary.

You will likely find some weakness, wordiness, and errors. Revise your rough draft to:

- Correct weaknesses in organization and coherence,
- Drop superfluous information,
- Add important information originally left out,
- Eliminate wordiness, and
- Correct errors in grammar and mechanics.
- Carefully proofread your final copy.

WRITING THE ABSTRACT OR EXECUTIVE SUMMARY (PURDUE OWL STAFF)

ABSTRACTS

When writing an abstract, draw on the key sentences directly from your report. Key sentences would be the ones that have a purpose statement, and then your main points. From there you should pull one or two key sentences from each major section of your report. This is where you might find key sentences that speak to your methodology, the results and/or

discussion, and the conclusions or recommendations. Here is what this might look in terms of organization:

- Purpose statement (one sentence)
- Main point (one sentence)
- Methodology/scope (one or two sentences)
- Results and/or discussion (one or two sentences, include if you are writing an informative abstract)
- Recommendations/conclusions (one or two sentences, include if you are writing an informative abstract)

Remember that you should be using the original phrasing in the report as much as possible, modifying the sentences as needed to make it readable to your audience. At this point you might be wondering when to write an informative versus a descriptive abstract. When in doubt always ask your instructor. However, if you're allowed to decide here are two things to help, both require you understand your reader and context.

Writing a descriptive abstract or not including the results and recommendations/conclusions may entice your reader to look beyond the abstract and either read the report or skip to those sections. Writing an informative abstract or including results and recommendations/conclusions helps busy readers (such as CEOs, managers, and other decision makers pressed for time) to not have to read your report to get the full picture. Whichever one you chose, chose it consciously, knowing why and what result you are hoping for. Here are some discussion questions to help you decide:

- Who is your reader?
- How quickly do they need to know this information?
- Does your reader need to make a decision based on this information?
- Does your reader need to read the report completely and why?

Figure 3.3 provides an example of a scientific abstract. It contains all of the elements mentioned earlier for an effective abstract: purpose, main points, methodology, results, and conclusions/recommendations.

EXECUTIVE SUMMARIES

When writing your executive summary, you need to keep in mind two main aspects of executive summaries that differ from writing abstract. First, you should paraphrase the main sections and main points of your report versus trying to use the same phrasing from the report as you would in an abstract.

	<p>Usability and User-Centered Theory for 21st Century OWLs</p> <p>By Dana Lynn Driscoll, H. Allen Brizee, Michael Salvo, and Morgan Sousa from <i>The Handbook of Research on Virtual Workplaces and the New Nature of Business Practices</i>. Eds. Kirk St. Amant and Pavel Zemplansky. Hershey, PA: Idea Group Publishing, 2008.</p>
Purpose statement	This article describes results of usability research conducted on the Purdue Online Writing Lab (OWL). The Purdue OWL is an information-rich educational
Main point and methodology	website that provides free writing resources to users worldwide. Researchers conducted two generations of usability tests. In the first test, participants were
Results	asked to navigate the OWL and answer questions. Results of the first test and user-centered scholarship indicated that a more user-centered focus would improve usability. The second test asked participants to answer writing-related questions using both the OWL website and a user-centered OWL prototype. Participants took significantly less time to find information using the prototype and reported a more positive response to the user-centered prototype than the
Conclusion	original OWL. Researchers conclude that a user-centered website is more effective and can be a model for information-rich online resources. Researchers also conclude that usability research can be a productive source of ideas, underscoring the need for participatory invention.

Figure 3.3. Example of a Scientific Abstract. (Based on https://owl.purdue.edu/owl/research_and_citation/using_research/writing_scientific_abstracts_presentation.html)

Second, you should be thinking about the best way to organize your summary. This situation often means *not* following the organization of your report. Here are a few discussion questions to help you think through how to organize your summary:

- What does my reader need to know?
- What are the main points I need to highlight in order to inform my reader?
- What is an effective order that I organize these key points and why?

Each of these questions is important to answer because the answers will help you stay focused and well-organized.

Now that you've considered the needs of the reader and the most effective way to organize your executive summary, here are the items you should include:

- Relevant background information to explain why a report was created.
- The purpose statement, placed early in the summary
- The main point, also placed up front (this might be the conclusion and recommendation)
- The key information from major sections in order of importance (this might be your results or findings)
- Thank your reader for their time and attention to your report, along with a way to reach you.

As you can see from this bulleted list, the organization of your executive summary might look very different than your report. Let's now take a look at an example and see what this looks like (see Figure 3.4).

Executive Summary	
Relevant background information	This report was written in response to a challenge in our Sustainability Student Group from Linda Kolton, Director of Sustainability at Colorado College. She asked us to
Purpose statement	develop options for converting one campus building to renewable energy sources. In this report, we discuss the possibility of converting Osborne Hall's heating system to solar.
Main point	We conclude that heating Osborne Hall with solar sources would require a combination
Key information organized in order of importance	of direct gain (skylights) and solar panels. The combination of these two solar technologies would ensure adequate heating for almost all the building's heating needs. A backup heater could be retained for sustained cold spells.
Key information organized in order of importance	To develop the information in this report, we followed a five-step research plan: 1) develop an evaluation criteria, 2) gather information on solar heating from industry already implementing such practices, 3) analyze the heating needs and heating costs of Osborne Hall, 4) conduct a literature review on solar energy in the past 10 years, and 5) analyze models of passive and active solar heating that would be appropriate for this building.
Key information organized in order of importance	The results of our research show that solar heating for Osborne Hall is possible, even for such an older building on campus. Our results also show that Osborne Hall can be a model for developing solar heating systems around campus, because it is one of the more difficult buildings to convert. We conclude with a cost analysis that indicates that solar heating would save the campus money in the long run. In the case of Osborne Hall, solar remodeling would pay for itself in 5-6 years.
Thank you and next step	We appreciate your taking time to read this report. If you have any questions or would like to meet with us, please call Diane Reese at 207-555-0001.

Figure 3.4. Example of an Executive Survey

The goal of an executive summary is that it is written in such a way that it can stand alone, apart from the rest of the report. And, as we saw, CEOs and managers may not have time to read your full report but still need to know key takeaways to make a decision. Hence, taking some time to figure out how to write an effective executive summary is a crucial skill for you to have. Here, writing and clear organization is key to drafting an effective executive summary.

CONCLUSION

This chapter has presented three common writing tasks in technical communication: memos, abstract, and executive summaries. These often accompany report writing and reports on work from projects. These types of writing, although typically read first, are written after your work is complete. They provide an opportunity to review your work and provide the needed information in a clear, concise, and meaningful way. Taking the time to learn how to do these relatively short writing tasks well can help you keep the necessary people informed and help guide decisions quickly.

WORKS CITED

- Purdue OWL Staff. *Purdue Online Writing Lab*. 3 Aug. 2020, https://owl.purdue.edu/owl/subject_specific_writing/professional_technical_writing/technical_reports_and_report_abstracts/index.html.
- . *Writing a scientific abstract*. 3 Aug. 2020, https://owl.purdue.edu/owl/research_and_citation/using_research/writing_scientific_abstracts_presentation.html.

TEACHER RESOURCES

OVERVIEW AND TEACHING STRATEGIES

These writing tasks are often drafted at one or more of three points during a larger project, report, or team task:

- When the large or whole project/report is complete,
- When a phase or stage of a project is completed, or
- When an expected need, development occurs.

This chapter can be taught when discussing any of these situations. By focusing on the purpose, audience, and main point(s), this chapter provides students with a mechanism for examining their projects/reports, and writing concise and useful memos, abstracts, and executive summaries.

When teaching these tasks, instructors need to make students aware that:

- Each of these writing tasks have conventions in format, tone, and organization that need to be met to allow them to be read quickly.
- Each of these writing tasks should be completed after the larger task/project/report is complete.

To this end, students need to learn the core idea that for them to write these writing assignments well they must know their projects/reports well. The framework in this chapter for each writing task provides students with questions that help them examine their projects/reports, and a mechanism for pulling that understanding into concise and organized piece of writing.

DISCUSSION QUESTIONS

To help students explore and develop the ideas discussed in this chapter, consider having them address—as individuals, in small teams, or as a class—the following questions:

1. By knowing who you are writing to, your reader/audience, how does that help you shape the information in each section of a memo? In each section of the executive summary? How does the reader's/audience's position in the organization, background information on the project inform what you include?
2. This chapter provides strategies for organizing each of the three writing assignments. What role does the organization of your main points—in all three types of writing—play in terms of the ability of reader to transition to reading the main report/project and not be confused? What are some examples of poorly organizing your main points?
3. What are your assumptions about concise versus short pieces of writing? Is concise writing always short? What are aspects of a piece of writing that make it concise? What is challenging about writing concisely?
4. It is often tempting, when you are done with a large project/report, to quickly draft the smaller writing tasks that are discussed in the chapter. What are some reasons to remember/recall about why devoting the time and effort to these writing tasks well is important?

Examining these items can help students better reflect upon their projects/reports and consider how to apply the ideas presented in each section to crafting well-organized and concise memos, abstracts, and executive summaries.