Briefing Memo Checklist

Top matter
☐ Includes date and full names and titles of author and recipient
☐ Subject line is specific and informative

Introductory paragraph
☐ Clearly states the purpose of the memo
☐ Tells why it’s written now (e.g., why issue is important, why a decision must be made)
☐ States the conclusion

Content
☐ Level of background information is appropriate for the recipient
☐ Leaves out unnecessary information
☐ Addresses relevant contextual factors (e.g., political, organizational, stakeholder views)

If the purpose is to summarize research:
☐ Main purpose of the study is stated clearly and concisely
☐ Main findings are presented clearly and concisely (not copied from the article)
☐ Important limitations of the research are noted
☐ Implications (and, if appropriate, recommendations) are clearly linked to findings

Organization and flow
☐ Each paragraph relates to the purpose of the memo
☐ Headings identify the focus of the sections and relate to one another
☐ Information is sequenced in a way that makes sense
☐ Conclusion follows from the body of the memo and restates the main point(s)
☐ Reasonable amount of white space (e.g., margins, paragraph spacing)
☐ Visual cues guide the reader (e.g., headings, judicious use of bullets)

Clarity and conciseness
☐ No unnecessary words or phrases
☐ Avoids jargon and complex words when simpler words are available
☐ Uses active voice
☐ Sentences have clear subject-verb relationships

Overall
☐ Main points are clear and memorable after just one reading
☐ The tone is professional (e.g., lets the facts speak for themselves)