WHAT DO I NEED TO DO TO PASS THE MEMO?
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To: All CEP, EVP and PSP Certification Candidates
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Subj: WHAT DO I NEED TO DO TO PASS THE MEMO?

As part of the exam for the AACE specialty certifications (CEP, EVP, PSP), the candidate is required to write a memo. There have been multiple questions and inquiries made to the Certification Program regarding what kind of memo would be appropriate for this exercise.

This Certification Corner article intends to give further clarification to what components are needed to pass the memo. There are multiple elements being tested in the certification memo exercise:

•Candidate's ability to communicate effectively and efficiently with a project manager or other executive.
•Candidate's ability to perform analysis and make a recommendation with incomplete or conflicting information. And,
•Candidate's ability to follow instructions and formatting.

The ability to follow instructions and formatting are simple "free" points. The instructions direct you to prepare a memo. We all recognize that memo's went out with the typewriter and have effectively been replaced by e-mail, but a memo is what you (the candidate) are instructed to compose.

The format for a memo is as follows: To, From, Date, Subject, and Project Name. Using the memo format in your response will gain you simple "free" points. Additionally, memo format starts with the body of the memo, not a salutation or a valediction, e.g. Dear Sir or Sincerely. To include Dear Sir or Sincerely in your memo will lose "free" points, because it is not a part of the memo format.

The ability to communicate effectively and efficiently with a project manager is a significant portion of the communications exercise. Assume you are communicating with a project manager that does not have as much knowledge of the subject matter as yourself. You have one typewritten page to educate the project manager, explain the issues and propose a solution regarding the problem on a project.

This communications exercise is ideally a five paragraph memo that is no longer than one page. The memo should take the following general format:

•Introduce the problem;
•Discuss potential solutions;
•Perform an analysis;
•Make a recommendation based upon the analysis; and,
•Close the memo.

In the introduction, grab the project manager in the first sentence with the issue at hand and its importance to the project. This sets the stage for the rest of the memo. What is the issue that needs a decision or needs to be addressed? Provide additional information as required to educate the project manager on your subject matter area if necessary.

Second paragraph, discuss potential solutions to the problem. There are potential solutions provided in the writing exercise. If you decide the potential solutions are not "complete" and you have a "better" solution, then you may add that solution to your memo. You should still address the solutions provided in the exercise.

Once the potential solutions have been discussed, a recommendation which is based upon the data provided should be presented. Remember part of this exercise is to deal with data that is "imperfect" or conflicts with other data. The recommendation should address all the data and describe why you chose to discount some of the data that was provided.

Finally, close the memo. Summarize the memo and what has been discussed; offer to provide additional information as necessary.

In summary, this communication exercise is an exercise to communicate effectively with a project manager in one page using a specified communication format. Address the decision to be made or the issue to be addressed. Discuss potential solutions to the problem from which the project manager should choose. Analyze the data and provide a recommendation to the project manager. Finally, summarize and close the memo with the offer to provide the project manager with additional information as required.

Good Luck!