# Memo Writing Guidance
## by the Certification Board

**Why Do We Use the Memo Writing Component of Testing for Potential Certification?**

Professionals seeking certification of their career specific experience and training rely heavily on their daily professional activities and their ability to successfully communicate via memos or emails with other project team members or stakeholders. Effective communication regarding pressing project issues and potential resolution of those issues to protect project financial profitability, on-time schedule performance, and/or quality measures, are daily responsibilities. Demonstrating the candidate's ability to succinctly perform these activities is tested through the memo writing portion of the certification exam efforts.

**What Does the Memo Writing Component Test?**

The memo writing component of AACE's certification examinations is an exercise that tests the ability of the candidate to communicate in writing effectively and efficiently with a project manager, project executive, or other stakeholder regarding a summary analysis of a problem and making a recommendation based on incomplete or conflicting information.  All of this is done while following memo crafting instructions and formatting.  In a memo writing exercise, the candidate is to assume they are communicating with a project manager or other project stakeholder who may not have as much knowledge of the issue and the subject matter provided as the candidate.  The candidate is tasked with summarizing the following for the memo recipient:

- the nature of the issue(s),
- the impact of the issue,
- the alternate solutions to the issue, and
- a recommended action to resolve the issue.

The candidate should then transfer the ultimate decision-making and follow up activities to the memo recipient for resolution of the issue(s).

**How Do You Construct a Test Memo Successfully?**

To complete the memo writing activity successfully and efficiently, the candidate should first take the time to read and understand the administrative elements of the memo assignment, to whom the memo is to be addressed, how the project should be described, and how the memo scenario identifies the candidate as writer of the memo. The candidate then summarizes the project issue(s) or problem(s) identified for resolution; the impact of the issue(s) or problem(s) to the project (i.e., cost, schedule and/or quality impacts); and outlines alternative solutions to the issue(s) or problem(s).

The candidate should detail, in their own words, each element of the project issue(s); project impacts, as mentioned previously, their quantitative or qualitative analysis of the alternatives outlined providing support for their recommended solution, concluding with a succinct, recommended action summary.

The candidate will need to keep in mind that the memo outlines the scope of the exercise, and they should strive to work within and with the parameters provided. Their experience may suggest additional options. However, the specific memo writing assignment provided focuses on using the presented project problem elements to draft a memo that will allow a project manager to take effective action and a successful memo will aim to meet this objective.

**Global Administrative and Memo Format Items to Keep in Mind**

The guidance below will prepare the candidate as they prepare their test memo.

*The Basics*

The candidate's finished memo should be no longer than a full typewritten page. A multiple-page memo might respond to the assignment, but it will detract from their opportunity to complete the other portions of the exam.

The candidate will need to know their AACE ID# as they will enter it to begin the memo. The header format for the memo is a traditional business memo format: To, From, Date, Subject, and Project Name including the titles of each named individual. The Subject should indicate the nature and importance of the problem.

*Memo Format and Flow*

In the introductory paragraph, the candidate should set the stage for the rest of the memo by clearly familiarizing the recipient with the nature of the issue(s) or problem(s) and the impact that issue has on the project. This is accomplished by providing adequate background information to set up the scenario. This paragraph should be a complete stand-alone statement of the issue and impact, without further explanations or clarifications.

In the second paragraph, the candidate should discuss each potential solution to the issue(s) or problem(s). The problem statement includes the options that should be presented in the memo. The candidate should address each of them. If the candidate decides the potential solutions are not "complete" and they have a "better" solution, then they may add that solution to the memo. However, the candidate will not gain credit for presenting alternatives that vary from the problem statement. The candidate should clearly and succinctly explain the pros and cons of each option, endeavoring to fully present each option in a neutral manner.

In the third paragraph, the candidate should analyze each solution option based upon the data provided in the memo scenario. Analyze each solution option explaining the cost, schedule and/or quality impact, and the corrective action inherent with implementing each option, as necessary. An element of this memo exercise is to deal with imperfect, conflicting data.

In the fourth paragraph, the first sentence should present the candidate's recommendation based on their analysis in a clear, concise, and unambiguous manner. The candidate's recommendation should

address all impacts and include the supporting arguments to completely represent the pros and cons of implementing your recommendation. The recommendation should be a stand-alone statement, independent of the other elements of the memo.

In the fifth and final paragraph, the candidate should summarize the memo with a clear, standalone statement, including the recommended solution to the issue and an operational handoff to the project manager. The candidate should explicitly pass the final decision and implementation action to issue/problem resolution to the project manager, offering to assist, or provide clarification on information in the memo, as needed.

Finally, the candidate should remember to be professional and precise in their writing. If this guidance is followed, then the candidate will have provided a well-written, successful document.