Certified Cost Professional (CCP) Memo Writing Guidance

by the Certification Board - CCP Certification Committee

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 communicate successfully via memoranda (memos) or emails with other project team members or stakeholders. Daily responsibilities include effective communication regarding important project issues and the potential resolution of those issues to protect project financial profitability, on-time schedule performance, and/or quality measures. The memo-writing portion of the certification exam tests the candidate's ability to communicate these activities succinctly.

What Does the Memo Writing Component Test?

The memo-writing component of AACE's certification examinations is an exercise that tests the candidate's ability to communicate effectively and efficiently in writing with a project manager, project executive, or another stakeholder regarding a summary analysis of a problem and make a recommendation based on incomplete or conflicting information. All of this is done while following the memo 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. Using the memo scenario information only, the candidate is tasked with summarizing the following for the memo recipient:

- the nature of the problem or issue;
- the impact of the problem or issue; and
- a recommended action(s) to resolve the problem or issue, using calculations and technical analysis from the memo given data

The candidate should then transfer the ultimate decision-making and follow-up activities to the memo recipient to resolve 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 the writer of the memo.

In their own words, the candidate should detail each element of the project problem/issue, including how the project is impacted, the quantitative or qualitative analysis of the appropriate recommendation, and provide technical support for the recommendation. The candidate should conclude with a summary of the recommended action.

The candidate must keep in mind that the memo outlines the scope of the exercise, and they should strive to work within the parameters provided, even if their experience may suggest additional options. The specific memo writing assignment provided focuses on using the project problem elements presented in the memo, allowing a project manager to take effective and timely action. A

well-organized and successful memo will 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 must know their AACE ID number and the memo number, as they will enter it to begin the memo. Next, address the memo in 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/issue.

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 problem or issue and its impact on the project. This is accomplished by providing sufficient background information to establish the scenario. This paragraph should be a complete stand-alone statement of the problem/issue and impact without further explanations or clarifications.

In the second paragraph, the candidate should analyze each potential solution based on the data provided in the memo scenario. Analyze each solution, explaining the cost, schedule, risk, and/or quality impact and the corrective action inherent in implementing each option, as necessary. An element of this memo exercise involves dealing with potentially imperfect and conflicting data.

In the third 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 supporting arguments to completely represent the pros and cons of implementing the recommendation. The recommendation should be a stand-alone statement, independent of the other elements of the memo.

In the fourth and final paragraph, the candidate should summarize the memo with a clear, stand-alone statement that includes the recommendation for addressing the problem/issue and an operational handoff to the project manager or project team. The candidate should explicitly pass the final decision and implementation action for problem/issue resolution to the project manager, offering to assist and be contacted to provide clarification on any information in the memo as needed.

The candidate should close the memo as is typical for business correspondence. Finally, the candidate should remember to be professional and precise in their writing throughout the exercise. If this guidance is followed, the candidate will have provided a well-written, successful document.