This article traces the historical evolution of the memorandum as a genre of written communication in American business during the late nineteenth and early twentieth centuries. It draws on published and unpublished materials from the period, including archival materials from E. I. du Pont de Nemours and Company and Scovill Manufacturing Company. The historical analysis shows that the memo developed from the letter, not for reasons related to rhetorical theory, but as a practical response to two sets of developments: (1) the emergence of new managerial theory and techniques, and (2) innovations in the technology of written communication. The study also reveals a significant lag between the actual emergence of the genre and its recognition in instructional materials in communication.

THE EMERGENCE OF THE MEMO AS A MANAGERIAL GENRE

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The genres of written communication in American organizations—including the report, the letter, and the memo—are so much a part of work life today that we find it hard to imagine the office without them. Yet of the three, only the letter has a long and continuous history (see, for example, Hildebrandt, 1988; Dickson, 1985; Locker, 1982). Reports existed, but generally took the form of letters until the late nineteenth and early twentieth centuries. The memo began to emerge as a genre in American firms only around the turn of the twentieth century. This article explores that emergence.[1]

What can the historical exploration of a genre tell us about management communication today? Understanding its origins may show us the relationship between form and function in a specific type of communication. A genre can be shaped by a variety of forces, some of them theoretical and some of them practical. These forces are often obscured as the years pass, causing both the characteristics of and assumptions about the form to harden into custom. When these formative forces are revealed again, we can

Management Communication Quarterly, Vol. 2, No. 4, May 1989 485-510

see more clearly which characteristics are still relevant and which commonly held assumptions are accurate. In this case, for example, the history reveals that specialists in business English, as the area was then known, were the last to notice the emergence of the new genre, and have consistently underestimated its importance ever since.

Even more important, understanding how previous genres took shape can alert us to the forces that may be shaping new genres today. This study, for example, shows that changes in managerial philosophy and methods and in communication technology, not changes in rhetorical theory, were the primary factors in the evolution of the memo's form and function. This knowledge can alert us to managerial and technological factors that may be driving the emergence of new or altered genres today.

Why focus on the memo genre in particular? In spite of its relatively recent appearance and the scanty attention it receives in textbooks on written modes of management communication,[2] the memo is, according to many surveys (e.g., Bennett & Olney, 1986; Storms, 1983; Stine & Skarzenski, 1979), the most frequently used type of written communication in business. For that reason alone it deserves study. Perhaps by highlighting the fact that the memo has been underrepresented in instructional materials from the time of its origin, this study can even contribute to upgrading its status. In addition, historical study can help clarify the classification of the memo. In their relatively brief treatments of the memo, textbooks have considered it sometimes a variant of the report (e.g., Lesikar, 1984; Sigband & Bell, 1986) and sometimes an internal version of the letter (Andrews & Andrews, 1988). This study discloses that the memo derived from the letter, though it took on some characteristics of the report.

METHODS, APPROACH, AND OVERVIEW

Studying the emergence of the memo poses some particular challenges for the researcher. Most of the existing historical studies of the letter genre (e.g., Hildebrandt, 1988; Dickson, 1985; Daniel,

1982) depend solely or primarily on instructional works in business letter writing from the time period being studied. Only rarely have scholars examined actual letters within their business context (e.g., Locker, 1982). Moreover, since the memo has always been accorded much less consideration in business or management communication textbooks than letters and reports, a study based solely on such instructional sources, as will become evident, would have been brief, limited, and even inaccurate.

The historical study reported here was part of a much larger study of the emergence and role of internal communication in American firms (Yates, in press). My published sources include instructional books and periodical publications on the theory and practice not just of business writing, but of many aspects of management. In addition, I have used archival materials from two manufacturing firms (the Scovill Manufacturing Company[3] and E. I. du Pont de Nemours and Company[4]) to gain an understanding of actual practice within an organizational setting. The archival documents provide both implicit and explicit evidence of the evolution of the genre. Combining these materials provides a much more complete picture of the genre's emergence than the published materials alone could have done.

The following analysis shows that the memorandum developed from the letter as a practical response to two sets of developments: (1) the growth of firms and the related emergence of a new managerial theory, called systematic management, and (2) innovations in the technology of written communication. The remainder of the article describes the historical influences on the genre and examines the resulting evolution of form and function from the letter into the memo.

HISTORICAL INFLUENCES

To understand the impact of changes in managerial theory and communication technology, we must first look at what preceded them. Then each of the changes can be isolated for analysis.

MANAGEMENT AND INTERNAL COMMUNICATION BEFORE 1880

Before 1880, America's manufacturing sector was dominated by small firms owned and managed by a single individual (or a partnership) and operating in restricted regional markets (see, for example, Chandler, 1977; and Nelson, 1975). Sometimes the owner/manager had the help of one or more foremen or skilled artisans in managing operations. Together, they could gather information, give orders, and coordinate operations orally. Other than the account books, written communication in business was used almost exclusively to span physical distances or firm boundaries. It consisted of correspondence with external parties such as customers and suppliers, and correspondence with firm members or close associates (e.g., commission agents) who were away from the main company site. This situation did not change significantly even in the small factories that emerged in the middle of the nineteenth century, despite their greater specialization and primitive departmentalization (Nelson, 1974, pp. 3-4; Wren, 1979, p. 49).

At this time, internal correspondence served simply as a way to bridge distance, not as a managerial tool. When an owner was on the road visiting suppliers or agents, he (during the period studied, owners and managers were almost exclusively male) might correspond with a partner, foreman, or bookkeeper to exchange information, orders, and opinions (see, for example, correspondence in Scovill 2/13). Commission agents (who were actually not firm employees but who enjoyed a closer relationship with the firm than did suppliers and buyers) corresponded with the owner to answer requests, provide information on markets and competitors, and transmit orders (see, for example, Scovill 2/13 and 1/456, and Du Pont 500/I/1/A and 500/I/1/B). Except for the quarterly or semiannual accounts, this correspondence responded to specific needs rather than forming part of a systematic flow of communication. With both partners and agents, letters might be frequent, but they were not regular in content or timing. Internal correspondence was simply an extension across distance of the ad hoc managerial methods used within the firm's main site.

Moreover, all written communication other than accounts followed the same letter format. This genre derived its form from

British predecessors. American model-letter books were patterned on British ones, with examples of sales letters, letters of collection, and other types of commercial correspondence (Weiss, 1945). The format of eighteenth- and nineteenth-century letters was much what it is today, allowing for the differences between handwriting and typing: The date and inside address were followed by the salutation, the body, and the complimentary close. The letters were extremely formal and stilted by modern standards, making heavy use of conventional wordy phrases, especially in letter openings and closings, a style Carter Daniel (1982, p. 10) has described as "the 'your-esteemed-favor-of-the-sixteenth-ult.-duly-to-hand' style." Internal correspondence was not differentiated from this model in any way. All such documents were referred to as letters; at this time, according to the Oxford English Dictionary, the term *memorandum* or *memo* generally meant simply a note to oneself.

GROWTH, SYSTEMATIC MANAGEMENT, AND INTERNAL CORRESPONDENCE

In the second half of the nineteenth century, influenced both by improvements in the technology of production and by larger markets made accessible by telegraph and railroads, companies began to grow and departmentalize (Chandler, 1977). Initially, however, managerial methods did not change. Thus by the final decades of the century, growth was failing to produce the expected profits, and large manufacturing firms were plagued by confusion and disorder (Litterer, 1961). The consequent inefficiencies drove the manufacturing managers to develop more effective managerial theory and practice, as reflected in a flurry of articles appearing initially in engineering publications such as the *Transactions of the American Society for Mechanical Engineers* and later in new management-oriented publications such as *Industrial Management* and *System*.

The new managerial philosophy expounded by this literature, which Joseph Litterer (1961, 1963) has aptly designated as "systematic management," was an attempt to achieve order and efficiency through managerial system or method. Systematic management has received far less attention than the so-called scientific management of Frederick W. Taylor and his followers. Yet scientific management was, as Daniel Nelson (1974, p. 480) has argued, "a refinement and extension of systematic management." Scientific management took for granted the improved managerial methods of systematic management throughout organizations and focused on additional reforms aimed specifically at the factory floor. Systematic management was thus broader, more pervasive, and more amorphous than scientific management.

Two basic principles seem to underlie the writings of the systematizers: (1) a reliance, not on individual initiative, but on systems mandated by top management; and (2) the need for each management level to monitor and evaluate performance at lower levels. The new reliance on system required that knowledge about manufacturing processes and outcomes that once resided in the minds and bodies of individual workers and managers now be documented in writing and communicated down the hierarchy. The systematizers wanted to depend on an organizational, rather than an individual, memory. Moreover, monitoring and evaluating lower levels required a system of reporting that documented operational information and drew it up the hierarchy. Both of these developments contributed to the decline of old fashioned, ad hoc management and to the rise of a formal internal communication system heavily dependent on written communication.

The values of systematic management infiltrated Scovill gradually, in several stages (Yates, in press, chap. 6). The first, minimal phase began in the 1870s, in the form of improved bookkeeping and slightly increased documentation of procedures and outcomes. Around 1905, a young manager initiated the second phase by introducing several of the principles and techniques of systematic management. A final stage of systematization began in 1918, when the company hired a statistician who was particularly concerned with the systematic flow of data up the hierarchy.

In contrast, Du Pont retained old-fashioned managerial methods throughout the nineteenth century (Chandler & Salsbury, 1971; Wilkinson, 1984), then adopted the values and techniques of systematic management suddenly and completely in the early twentieth century (Yates, in press, chap. 8). When one member of the du Pont family wanted to introduce some management innovations in the last decades of the nineteenth century, he encountered so much resistance that he was forced to break away and establish the Repauno Chemical Company. That firm, which was still partly owned by Du Pont itself, had a very progressive management team and was a leader in systematic management (see, for example, Wilkinson, 1965; and Dale & Meloy, 1962). When a younger generation of the du Pont family took over the Du Pont Company itself in 1902, they absorbed Repauno Chemical Company (and many other small companies) and rapidly spread its principles and techniques throughout Du Pont (Chandler & Salsbury, 1971; Yates, in press).

In these firms and many others, two forms of internal communication initially emerged as a result of the systematization: downward mass communication of rules and procedures, and upward reports (see Yates, in press, for a full discussion of the emergence of these genres). The former category included both short communications on a single subject, called circular letters and bulletins (which today would probably take on a memo form, but then were a separate genre), and long manuals or rule books. Systems of daily, weekly, monthly, and yearly reports created a regular flow of information to aid in monitoring operations, while special reports investigated problems or opportunities. Both circular letters and reports developed from the letter format in ways designed to differentiate them and to make them more efficient to write and read. Many reports, for example, had subheads, tables, and charts. Circular letters were often numbered and headed with a subject-based title.

The documentary impulse evidenced in mass downward communication and in upward communication was gradually extended to lateral communication and to nonroutine vertical communication, resulting in the emergence of large amounts of internal correspondence within a single site. As a 1909 text on correspondence filing noted:

> Of considerable importance in every large organization is the inter-department correspondence—the notes from one department head to another. Every department head finds it necessary at times to

> request information from other departments. Even with an intercommunicating telephone system with which every large office and plant should be equipped, many of these requests are of a nature that, to guard against misunderstandings, demand written communications. (Griffith, 1909, p. 7)

The general tendency toward increased documentation was stated even more strongly a decade later: "It is necessary in business that orders should be definitely given, questions specifically and intelligently asked and answered, and that some record of all communications be kept" (Gallagher & Moulton, 1918, p. 184). In many cases, the correspondence documented decisions that were also communicated orally, as evidenced by opening phrases such as "Confirming our discussion" or "Confirming our telephone conversation" (e.g., July 28, 1921, E. O. Goss to C. P. Goss, Scovill 2/26).

This extension of documentary communication also reflected more specific political motivations. As companies grew, allegiances to and rivalries between departments created friction, and each side of each dispute wanted to document its view of the issue. In the pre-1920 files of the foreman of Scovill's Casting Shop, for example, the most extensive internal correspondence was with the Research Department (Monagan files, Scovill 1/26). The Casting Shop had lost considerable power to the new Research Department in the early twentieth century as the secrets of casting—previously known only to casting bosses—had been documented and studied (Bishop, ca. 1950). The tensions between these two units were documented in notes such as the following:

> The second paragraph of your letter of March 14 reads as follows:
>
> "It is my understanding that you will suspend weekly reports, and that you will not require analyses of the metal, at least, for some time."
>
> I would like to go down on record as saying that if at any time I wish to have any part of the program, which has been agreed upon by the Research Committee and myself, suspended I will notify the Research Committee. This to my mind is a serious subject and

> unless you feel that it is impossible for you to give us the required information, in so far as analyses are concerned, I will expect that the program agreed upon by the Research Committee and myself, be adopted and not the program outlined in your letters of above dates.
>
> I will see to it that reports, agreed upon in the original program, shall be passed on to you. Trusting that there is no misunderstanding and if there is I stand ready and willing to make all necessary explanations. (March 25, 1918, Monagan to Bahney, Scovill 2/26)

The two men had resorted to correspondence, in place of or in addition to face-to-face arguments, to document their conflict for possible later reference.

The emergence of internal correspondence within a single company and even a single facility—the many short documents now called memos—was driven by the new managerial needs resulting from firm growth and systematization. Before examining the divergence in form of internal and external correspondence and the development of the memo genre's formal characteristics, we must look at another factor that played a role: innovation in communication technology.

COMMUNICATION TECHNOLOGY AND INTERNAL CORRESPONDENCE

During the same turn-of-the-century period that saw the development of extensive internal written communication as a tool of systematic management, innovation in the technology of written communication made handling that communication more efficient. These technological developments both responded to and encouraged the vast increase in written documentation. Moreover, they played a role in shaping the memo's function and format. The innovations most relevant to the memo genre occurred in the creation and the storage of written documents.

The physical production of correspondence using a quill or steel-tipped pen was a laborious and time-consuming process, and its products were often difficult for the reader to decipher. The typewriter, which appeared in the final quarter of the nineteenth century, increased the speed of document production by at least three times and produced much more readable documents (Bliven, 1954; and Current, 1954). The typewriter was adopted in 1888 by both Scovill (see Scovill 1/315) and Du Pont (Macklem, 1927). Moreover, because trained operators used the machine more efficiently than the managers who composed the documents, and could be paid less, typists were introduced into the office almost immediately, replacing or supplementing existing office staff. In addition, typewriters, unlike quill or steel pens, could be used with carbon paper, a copying technology that had been available since early in the nineteenth century but that heretofore had had only limited application (Yates, 1987).

These innovations affected all correspondence, including internal. First, they reduced cost and time barriers to increased correspondence. Moreover, the emergence of trained typists helped standardize existing and emerging formatting conventions within firms. In Scovill during the mid-1890s, for example, the two typists used exactly the same letter format, which included the initials of the typist (Scovill 1/360). In addition, the typewriter made such correspondence easier to read, thus improving the efficiency of the reader as well as the writer. Finally, the carbon copies produced with the typewriter replaced bound press copies, opening the way for the changes in filing technology discussed next.

While the typewriter affected all forms of written communication equally, developments in the technology of correspondence storage and retrieval had specific as well as general implications for the emergence of the memorandum form. The familiar and mundane vertical files in every office today were considered a major breakthrough in storage systems for correspondence when they were introduced at the end of the nineteenth century (Yates, 1982). Previously, incoming correspondence and copies of outgoing correspondence were stored centrally but in two separate systems, with outgoing correspondence press-copied into bound chronological press books[5] and incoming letters stored in pigeonholes or letter boxes organized in various ways. Since this system had always been used for external correspondence, internal correspondence was stored haphazardly, if at all. In this storage system, finding all of the internal and external correspondence on a given topic was difficult.

Introduced at the 1893 Chicago World's Fair, vertical files were presented as a system for combining all correspondence (outgoing, incoming, and internal) in a single, more functional system (Yates, 1982). Indeed, when the progressive Du Pont spin-off, Repauno Chemical Company, introduced vertical files in 1901, it combined internal and external correspondence for the first time (Du Pont 500/II/2/#986). This filing system was adopted by Du Pont itself after the 1902 consolidation. Similarly, Scovill combined its correspondence in a single system when it adopted vertical files at the beginning of 1914 (see files in Scovill 2/26).

In such filing systems, each tabbed folder of loose papers contained copies of outgoing letters, incoming letters, reports, and internal correspondence, all on the same subject. The folders could be arranged and rearranged at will, on the basis of subject, correspondent, number, or geographical region. The most popular method, used by both Scovill and Du Pont, was alphabetically by subject (though the "subjects" were often the names of corresponding companies, individuals, or departments). While experts on filing all advocated centralized vertical filing systems, the elimination of a single set of bound press books, along with the recently acquired ability to make multiple carbon copies on a typewriter, seemed to open the way for the proliferation of files. Vertical files began to appear at department level and below, as well as in a central system (see, for example, in Scovill 2/26).

This new storage technology affected the survival, the function, and (as the next section shows) the form of internal correspondence. On the most basic level, functionally organized vertical filing systems made the survival of internal correspondence more likely. Since the previous storage systems had no real place for internal correspondence, what little was written rarely survived beyond its initial use. In the Scovill records, for example, no lateral correspondence from before the firm's 1914 adoption of vertical files has survived. With the new filing systems, internal correspondence was much more likely to be saved for future reference, as Scovill's post-1914 vertical files, which are full of internal correspondence, illustrate (Scovill 2/26). A well-organized indexing and filing system assured accessibility as well as survival, thus enabling internal correspondence to serve a documentary function more readily.

The enhanced documentary function seems likely to have increased the amount of internal correspondence. In Scovill, while we cannot know how much internal correspondence was written before 1914, we do know that extensive amounts survived in the post-1914 vertical files. Moreover, much of it, as we have seen, seems intended primarily for documenting, not just conveying, the contents. While it is difficult to prove that the new filing systems encouraged growth in internal correspondence, one Pennsylvania Railroad study demonstrated the inverse of that relationship: When the railroad eliminated filing systems below the division level, the volume of correspondence dropped by 20% (Hanna, 1913). Together these facts at least suggest that vertical filing induced an increase in internal correspondence.

Thus innovations in the technology for producing and storing documents encouraged the development of internal correspondence, which had initially been driven by firm growth and the philosophy of systematic management. These two sets of factors also played an important role in shaping the emerging genre's form.

THE CHARACTERISTICS OF THE MEMO GENRE

The Taft Commission on Economy and Efficiency, a government panel studying office methods early in the second decade of the twentieth century, noted that large American corporations were "experimenting" with simplified and more functional forms for internal correspondence (President's Commission, 1912, pp. 27-28). Evidence of this experimentation appeared in articles and books on office methods and filing, as well as in Scovill's and Du Pont's correspondence, well before it appeared in the business English texts of the era. The form and style of internal correspondence began to diverge from that of external letters in ways intended to make it more functional to read and to handle.

INITIAL CHANGES IN FORMAT

Scovill was ahead of Du Pont in the early stages of differentiating the memo from external letters, though it was behind in later stages. In the late 1870s and early 1880s, according to press books and retrospective lists of forms found in the archival materials, the company adopted inexpensive stationery for correspondence between Scovill's plant in Waterbury, Connecticut, and its stores in New York, Boston, and Chicago. The letterhead stationery was designed for efficiency and ease of handling. At the top it had the return address of headquarters, all but the final digit of the date, and the addressee (either naming the New York store or leaving a blank before "Store" for inserting the specific city). In addition, Scovill adopted half-sized stationery headed "Memorandum" for brief and very informal notes from the New York store to headquarters, a very early use of the term for internal correspondence (Scovill 2/46). These new forms, especially the small ones, seemed to encourage a terser style and sometimes the omission of the traditional complimentary closing (e.g., April 21, 1876, Sperry to the New York Store, Scovill 2/47).

The need for efficiency in filing led to another distinction between internal and external correspondence. In subject-based filing systems, a document needed to be filed under a single subject. As one authority on filing noted, this dictated that "so far as practicable each letter be confined to a single subject" (Williams, 1910). Much external correspondence responded to letters from customers and suppliers, and often could not be confined to a single subject. Internal correspondence could more readily be restricted to a single subject. When Repauno Chemical Company adopted vertical files, one of its managers wrote to another as follows:

> In order that the new system of filing our correspondence, which I have adopted in my office here, may be effective, it is essential that each subject corresponded about should be included in a separate letter, as when 2 or more subjects are written about in the same letter, it is necessary for extracts of each to be made for the different files. (May 18, 1901, Barksdale to Ramsay, Du Pont 500/II/2/#986)

When Scovill adopted vertical files over a decade later, its management also demanded that correspondents in its stores limit letters to a single subject (December 27, 1913, Scovill 1/558).

With this limitation to a single subject came a further step to aid filers: the addition of a subject line to indicate what a letter was to be filed under. The Repauno manager who had requested single-subject letters began to include a subject designation and sometimes a file number on his internal correspondence. Similarly, Scovill headquarters advised employees at its New York store to "place at the top of the sheet the name of the subject about which the letter is written," in this case the customer's name, when they wrote to headquarters (December 27, 1913, Scovill 1/558). This request was followed up a few days later with a reminder: "We are changing our system of filing, and we must INSIST that you pay particular attention to this matter" (December 31, 1913, Scovill 1/558).

Further changes in form were designed to make internal correspondence cheaper and more efficient to type and handle, as well as to file. In a 1904 article in the appropriately named *System* magazine, one systematizer (Belfield, 1904, pp. 113-114) advocated several changes in "interhouse correspondence" (i.e., correspondence between different locations of a single company) that would make these documents look more like present-day memos than like letters. His discussion is worth quoting at length, for it sheds light on the underlying reasons for the changes.

> In the first place, all unnecessary courtesy, such as "Fred Brown & Co.," "Gentlemen," "yours very truly," and other phrases are omitted entirely. In a business where hundreds and sometimes thousands of interhouse letters are written daily the saving of time is considerable. Next, an expensive letterhead is done away with, and this also is a factor in reducing expense. The blank is made with simply the words, "From Chicago," "From Atlanta," or whatever may be the name of the town where the letter is written, printed in the upper left-hand corner, and underneath the word, "Subject." In the upper right-hand corner is the serial number of the letters and the words, "In reply refer to No." and "Replying to No." It will thus be seen that the only typewriting necessary in addressing a letter consists of the location of the house to which the letter is to be sent, a short

> summary of the matter contained in the letter for indexing purposes, the number of the letter, and date, with the initials of the writer, and the number and date of the letter which is under reply (in case there has been previous correspondence), with the initials of the former correspondent.

The traditional salutation and closing with their formal and polite style were eliminated to save time in writing and typing. Letterhead stationery was replaced by a cheaper and more efficient form heading that included spaces for all the information the sender and receiver might need to file and retrieve the communication, including a subject line. Under the influence of the systematic management philosophy, Belfield was willing to sacrifice tradition to efficiency and system.

Du Pont's High Explosives Operating Department (HEOD)—built around Repauno Chemical Company when it was absorbed in 1902, and run by some of Repauno's old management—was making similar changes in the format of its internal correspondence during the same period. In 1908, the department suggested that "It is of course advisable to use good stationery when writing to outsiders, but an unnecessary expense to use too good stationery for letters between ourselves" (April 10, 1908, circular letter #198, Du Pont 500/II/2/#550). By 1911, the department had standardized cheap stationery for internal use, also differentiating it by using green paper for the original and white with a red "File Copy" designation for carbon copies (November 7, 1911, circular letter #834, Du Pont 500/II/2/#550). Two years later, the department also standardized several other mechanical aspects of such letters, mandating such details as margin width (September 16, 1913, circular letter #1089, Du Pont 500/II/2/#551). The systematic management philosophy's goals of efficiency and standardization are evident in these changes.

MORE COMPREHENSIVE CHANGES IN STYLE AND FORMAT

Much more sweeping changes in the emerging genre, changes which extended beyond the format into the style itself, resulted from a remarkable efficiency study of internal correspondence carried out by the HEOD Efficiency Division around 1913. This study was originally reported in a letter to the director of the HEOD (November 17, 1913, attached to circular letter #1113, dated December 22, 1913, Du Pont 500/II/2/#551) then revised into a report (dated December 22, 1913) circulated throughout Du Pont with the endorsement of a cover note from President T. C. du Pont (January 6, 1914, Du Pont 500/II/2/#1005/2). In its earliest form, the study leaned heavily on the Taft Commission's 1912 description of experimentation with simplified forms for internal correspondence. In its final form, the HEOD report emphasized efficiency over authority in making its argument.

The report recommended four changes in internal correspondence: (1) eliminating the salutation and complimentary close, (2) simplifying the recipient's title and address, (3) standardizing the format, and (4) reducing unnecessary words. According to the report, the first two changes "would cut out an average of at least 10 words each." The third recommended change, a new standardized format, would aid in handling and filing such correspondence by placing at the top of the page the addressee's name and department, relevant file numbers, a subject designation, references to previous letters, and a list of enclosures. The new format also helped in accomplishing the fourth goal: reducing unnecessary words in the letter. With the information in this heading, standard opening sentences such as "We have letters dated October 4th and October 17th from___ as per attached . . ." could be eliminated. The report pointed out that further cuts in words could "be effected by eliminating the use of the traditional expressions and phrases of oldfashioned business correspondence, which employ many words for ideas which could be much better expressed in fewer words, and many of which could be omitted altogether." The report listed several wordy phrases (such as "We are in receipt of a request from St. Louis office for") and shorter substitutes ("St. Louis asks for"). Such word cutting, the study noted, was particularly appropriate to replies to requests for information, which needed little background and "may be just as concise as the dictator can make them—in memorandum form, if you please." (Here, we can see the word "memorandum" shifting from its old meaning, a note to oneself, to its new one, a name for internal correspondence.) The report noted that internal letters initiating an exchange, rather than responding to one, "may have to be presented more in the narrative style, as circumstances demand, to attract the attention of the reader," but wordy phrases could still be excised.

The report contained several examples of the economies made possible by adopting its recommendations, including the following:

AS ORIGINALLY WRITTEN

August 16, 1913

Copy to Chemical Department.

Mr. C. A. Patterson. Supt.,

Gibbstown, N.J.

Dear Sir:-

OUR FILE OH—1129. Referring to your letter of June 11, in regard to the deposit of so-called "Triton Whiskers" in your weak nitric acid glass tube lines, we are sending you herewith copy of letter of August 15th from the Chemical Department on this subject which is self-explanatory.

You will note that Mr. Chickering expects to be at Repauno on Monday or Tuesday of next week to discuss this matter with you. From the estimate given in the Chemical Department's letter, the apparatus which it is proposed to install can be put in under a Minor Construction Notice.

Yours very truly,

(Sgd.) W. C. Spruance, Jr.,

J.T.B.

(118 words)

SAME LETTER REVISED

August 16, 1913.

Copy to Chemical Dept.

SUPT. REPAUNO.

OUR FILE OH-1129. TRITON DEPOSITED IN WEAK NITRIC GLASS LINES.
Your letter 6/11/13.
Enclosure Chemical Department letter 8/15/13.

Mr. Chickering will discuss this with you Monday or Tuesday.

The apparatus proposed can be put in under a Minor Construction Notice.

(Sgd.) J. Thompson Brown
(49 words)

With much of the information moved into the heading, the revised letter is less than half the length of the original, the report noted.

The study's authors based their arguments on efficiency: Cutting words would make "the letters easier to dictate, to write [i.e., to type], and, most important of all, to read and understand." They admitted that changing old traditions was not going to be easy, but argued that the result was worth the effort:

> Efficiency has come to stay, and in its application the first great essential is "changing our minds" about the fundamentals of business.
>
> To alter one's point of view regarding the ponderous phrases and expressions of commercial correspondence is necessary. It may be difficult, in some cases more than in others, to overcome the inertia of our long-standing habit of clinging to the traditional forms and usage, but after the right attitude is attained, there should be little difficulty, and a constantly diminishing tendency on the part of the recipient of a letter to "get sore" at the terseness or bluntness of the communication.

While eliminating the polite but wordy stylistic conventions of the letter-writing tradition might initially seem rude, they argued, that effect would soon lessen. Meanwhile, internal correspondents could reap the advantages of improved efficiency.

In his transmittal letter, President T. C. du Pont even quantified the potential efficiency gains by counting the words in the before and after versions of the samples included in the report: "This study developed that a number of that department's letters originally totaling 1,444 words could have carried their message just as well with 755 words, a showing of about 52% efficiency in handling correspondence." This concept of efficiency was, of course, naive, as Vice President Irenee du Pont pointed out in a letter to the Efficiency Division:

> Laborious consideration to make the letter as logical and short as possible is warranted, if a letter is to be read by many or referred to many times in the future, but most letters will only be read once or twice so that it is probably better to dictate quickly rather than take twice the time to express the thought in fifty percent of the words (May 19, 1914, Du Pont 228/H/VP/#99/ID-3).

Moreover, the extreme stylistic compression advocated by the report might sometimes lead to misunderstandings. Actual memoranda from this period do not seem to carry that compression to the same extent as the samples do. Nevertheless, the report and related correspondence reveal the extent to which changes in the memo genre within Du Pont were based on the concepts of systematic management, as well as on the needs created by the filing system.

While Scovill had preceded Du Pont in preliminary distinctions between internal and external correspondence, it lagged in later ones. With the adoption of vertical files at the beginning of 1914, many years after Du Pont had adopted them, subject designations were added to letters from Scovill's stores to its headquarters. The surviving internal correspondence of the period from 1914 to 1920 (Scovill 1/26) varies in form, however, with many notes within the facility still looking more like letters than like modern memos, as the following example shows:

March 4, 1919

Mr. W. H. Monagan:-

I attach herewith, Mr. Dunnigan's letter. This matter has been attended to, and the scrap is being shipped out on this order as No. 83.

We would appreciate it very much, to hear of any other error of this kind that your men may find while inspecting Scrap.

W. P. Ferguson
WPF/GCG.

This note lacks even a subject designation, indicating either that the rule imposed at the time vertical filing was adopted had lost force, or that correspondence that never reached headquarters was not held to this standard. Moreover, while the worst excesses of traditional letter-writing style have been eliminated, this note does not follow the more extreme economy of words advocated by Du Pont's Efficiency Division.

More complete standardization arrived at Scovill only in 1920. An index of notices issued by the general superintendent lists a notice issued early in 1920 about "Inter-office correspondence form" (Scovill 2/60). While the notice has not survived, internal correspondence dated after that consistently has a memo heading with "To," "From," and "Subject" lines at the top, and omits the complimentary close, as in the following example (Scovill 2/26):

April 14, 1920.

From: Electric Furnace Division, Research Dept., Bldg. 72-2.

To: Mr. W. H. Monagan.

Subject: Electric Furnace Charges.

Referring to my conversation of April 12th, 1920, with your Mr. Ross relative to the use of #138 chips in Electric Furnace charges, the chips were quite oily and gave us so much trouble that I changed the charge as shown below:

Copper	286 lbs.
Zinc	225 "
Lead	24 "
#138 Scrap	1240 "

#50 Scrap	225 "
Total	2000 lbs.

Substitute 100 pounds of #138 chips and 60 pounds of ingots in the place of part of the raw metals.

Copy to
Mr. L. W. Bahney. (signature)
LFC.SOR

Thus Scovill took longer than Du Pont to standardize the formal aspects of the genre, but a standard form, differentiated from external letters, was eventually established.

THE MEMORANDUM IN COMMUNICATION TEXTBOOKS

The differentiation of internal from external correspondence that was occurring in firms had been noted in filing and office management texts by the beginning of the second decade of the twentieth century (Belfield, 1904; Griffith, 1909; and Schulze, 1913). It was only at the end of that decade, as far as I have been able to determine, that business writing texts recognized the existence and formal characteristics of internal correspondence. While most such texts still ignored the new genre (see, for example, Hotchkiss, 1916-1917, and Watson, 1922), a 1918 business English text discussed what it termed "departmental letters." It noted that, since they "go to different departments of the house, the usual formal heading, introductory address, and salutation are needless, and a uniform system of mechanical details is adopted in each house" (Gallagher & Moulton, 1918, p. 184). No single form of "mechanical details" had been accepted by every firm (as is still the case), but each firm adopted its own uniform system. The text went beyond the mechanical details of the heading to note changes in style: "In departmental letters the absolute essential is clearness. Questions take time and delay action. . . . There is also no need of establishing personal relationship, so that courtesy should receive less consideration than directness and completeness" (p. 184). The text also showed examples that included tables to increase readability.

A 1923 New York City Board of Education report on the curriculum for commercial education (1923) also recognized the existence of the genre, though it displayed some confusion in classifying it. While the report listed "Intra-Company Communications" in a list of types of business letters (p. 14), it also discussed "memoranda" or "memos" as short reports (pp. 16-17). This apparent confusion about the genre's classification is not really surprising, since the report had also evolved from the letter genre and also reflected a preoccupation with functionality and efficiency. Both the report and the memo, the New York City Board report noted, were characterized by their "logical arrangement" and their "explicitness, literalness, and cool impersonality of statement." A sample was praised for its "strictly businesslike tone," which "makes for brevity and directness" (p. 53). Thus the reclassification of the memo as a form of report rather than an off-shoot of the letter reflects actual similarities (though similarities to the letter remain, as well), but ignores the genre's origin.

By the 1920s, then, the existence and general characteristics of the new genre were acknowledged in some published business English texts as well as in the office management literature and in the archival materials of the two firms I studied. The genre's name was still not agreed on universally. At least one office management text used the term "memo" as early as 1913 (Schulze, 1913, p. 172), and Scovill labeled its shorter stationery for internal correspondence with its own stores "Memorandum" even earlier. Other published and unpublished treatments still referred to the documents by other terms (e.g., "inter-house correspondence" or "departmental letters"), but the name of the genre was less critical than its differentiation from other genres.

CONCLUSION AND IMPLICATIONS

This study of the emergence of the memo as a genre has demonstrated the extent to which it was shaped by managerial needs and communication technology, rather than by rhetorical theory. The conclusion that organizational reality was central in shaping certain changes in business and managerial writing reinforces the findings of another extended study of business communication within an organizational context, Kitty Locker's (1982) study of the evolution of letter-writing style within the British East India Company. Together, these findings suggest the need for taking organizational context into account in many more historical studies of communication in managerial settings.

This need is reinforced by the fact that business English texts of the period delayed acknowledgment of a new genre long after it was present in firms and acknowledged in the managerial literature. This lag suggests that communication texts alone are an unreliable source for what is really occurring in business at any given time. Except when the subject of study is the *instruction* itself, communication texts should be supplemented by other published and unpublished materials, particularly actual documents that can be studied in relation to their organizational context.

For the teacher and textbook writer in management communication, the fact that textbooks lag significantly behind business reality suggests that it is easy simply to follow accepted ways of categorizing and presenting business documents and thus to ignore the actual needs of business. Indeed, texts still pay inadequate attention to memoranda, even though they are the most commonly written documents in business today. Instruction in management communication must keep up with changes going on in the business world to avoid becoming outmoded.

Finally, this study reinforces the value of historical research. In helping us to understand the origins of the memo genre, history has helped us classify and describe it. We can see that the memo format differs from that of the letter primarily in ways that increase efficiency in preparing, handling, and filing the documents. This knowledge can help us in teaching our students about the genre.

NOTES

1. This article is the revised version of a paper presented on October 29, 1988 at the 1988 annual meeting of the Association for Business Communication in Indianapolis, Indiana.

The paper is based in part on a larger study, titled *Control through Communication: The Rise of System in American Management*, to be published by Johns Hopkins University Press in June, 1989.

2. Even in recent editions, some of the old standard texts (e.g., Lesikar, 1984; Sigband & Bell, 1986) cover memoranda in just a few pages, considering them a minor subset of reports. This treatment compares to several chapters each on letters and reports. More recent texts (e.g., Andrews & Andrews, 1988; and Bell, 1987) cover the genre a little more fully, often giving it a full chapter. They still give other genres, particularly letter writing, even fuller treatment. Only in a very few cases (e.g., Munter, 1987; and Bogert & Worley, 1988) are memos and letters given equal treatment, usually in cases where form is treated as much less important than rhetorical purpose.

3. The Manuscripts and Archives Department of Baker Library, Harvard Business School, houses the records of the Scovill Manufacturing Company. This large collection consists of two groups of records (designated Scovill 1 and Scovill 2) starting when the company was founded in 1802 and continuing into the early twentieth century. To avoid extensive footnoting of archival materials, I will use in-text references that include the date, the sender and receiver, and an archival designation consisting of Scovill 1 or 2 followed by a case or volume number (e.g., Scovill 2/13).

4. The Hagley Museum and Library in Wilmington, Delaware, houses several extensive collections of Du Pont company and family materials. The largest collection, made up of two major series, is accession 500, the papers of E. I. du Pont de Nemours and Company. To avoid excessive footnoting, I will provide parenthetical references to these materials in the text. These references will include the accession, series, groups, and box or item numbers, as in "Du Pont 500/II/2/#799." Although the firm took on different names at various times (e.g., the Du Pont Powder Company), I will use "Du Pont" in referring to all forms of the firm, and "du Pont" in referring to the family.

5. As I have explained elsewhere (Yates, 1982, in press), press books were volumes of tissue paper pages. A document written or typed with an aniline copying ink was placed under a dampened page (the rest of the pages were protected by oilcloths) and the volume was closed and placed in a letter press. This large screw press was used to compress the volume, causing a reverse impression of the letter to appear on the bottom of the tissue paper page. This impression was then read from the top, through the thin tissue paper. In its common form, as just described, this technology was based on the bound volume. Thus it required that incoming and outgoing correspondence be stored separately. Around the turn of the century, a rolling press copier that produced individual sheets became popular, but it was rapidly replaced by carbon paper used with the typewriter. Both of these technologies produced loose, rather than bound, copies.

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