Tip 2: ITEMIZE INSTEAD OF EXPLAINING.

Context Tip Number Two: depending upon the context, itemize instead of explaining. When we write, we use certain writing materials as a default. For instance, when we're crafting a sentence, we use parts of speech and punctuation to build different types of architectures for our sentences. Remember that from Level One?

While our goal ultimately is usually to draft paragraphs that make up larger genres like emails or memos, business letters, white papers, articles, reports, and proposals, we use paragraphs as a default because they allow us to explain. And ultimately, that's a key reason that genres even exist––to help us explain. Sometimes though, you don't want to explain. Depending on the context, you may want to itemize instead of explaining. Let's dive in to what we mean.

In business contexts, you should use bullet-points and numbered lists instead of paragraphs when the relationships among the ideas are crystal clear, when there are no transitions needed, and when larger ideas are digestible and sufficient without getting into all the details. Think about this as information that can work on the level of memorization instead of deep engagement. If someone can simply memorize the information you're trying to share with them and they don't necessarily need to dwell on it for a long period of time, then it's better to use numbers or bullet-points so that you can highlight their sequence or show how they exist in a relationship.

Here are some examples. If you're trying to communicate the types of supplies or features or items that might be needed for a particular mission that you're trying to accomplish, it's definitely best to just use bullet-points and list them out. This is kind of like the age-old advice of writing down your grocery list. So, certainly that's the simplest example of when it's appropriate to use bullet-points instead of writing things out in paragraph form, but sometimes using itemized lists can also be an effective way to communicate more complex information.

Let's look at this example. "Here is our research plan: Number One hone

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the question. Number Two: search the databases. Number Three: seek input. Number Four: draft the manuscript. Number Five: solicit peer feedback and Number Six: prepare the final draft.

Sure, we could write all of that out inside of a paragraph, but it's really nice for our team to get on the same page together by being able to itemize and see each step as it's going to occur. Sequencing information in this way is a really effective way to rapidly communicate a plan of action or something that can be broken down into steps.

Let's see what this looks like at the sentence level. You can itemize information that otherwise would have been in a sentence when the information is simple and all functioning at the same level. So, in this case, instead of using commas, we're going to break each comma item into a bullet. Here we go. We suggest that you conduct research with:
- a more racially diverse patient population,
- a less vulnerable patient population,
- and a larger patient group.

This sentence is a perfect candidate for listing because all of the list items share the same structure, and yet by bullet-pointing them instead of burying them within the sentence, the reader can digest that information more quickly. This is especially useful in genres like emails where people really want the most crucial information right at eye-level, so they can read it and move on.

Let's look at a way that you can use itemized lists at the paragraph level. And this is not through the use of bullet-points–– instead it's through the use of sub-sections or the design feature of bolding, italicizing, or doing something else to set off certain phrases and words.

As you can see, in the first version of this paragraph there was nothing to indicate where my eye should go, but now in the paragraph list because of the bolding that we've used it's clear to me that there are three types of utilization review that I'm going to pay attention to: prospective review,

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concurrent review, and retrospective review. It's a simple design-based choice, but it helps the brain itemize information and digest it more appropriately. So, the act of itemizing is not only appropriate for communicating simple lists. It's also a really effective way to break complicated information down into smaller chunks.

Here's another example of a context where you might want to itemize instead of explaining and that is the meeting agenda. Yes, that document that plays such an important daily role in our business lives. Now, you may have seen an agenda before that uses bullet-point lists, but let's take a look at the rationale behind that choice. Short bulleted items help keep information manageable, which helps direct the flow of information and keep the conversation on task. Also notice how the addition of headings helps direct items even further by allowing you to organize them into manageable chunks.

So, at Untold, this is a look at our standard meeting notes template. We list all of the attendees, who they are, and the date of the meeting, then for each meeting date we have an agenda, we have discussion topics, and then we have next steps. We take this a step further because we do all of our meeting notes in Google Drive and that allows us to for every next step, create a bullet-point to actually assign a person to accomplish each task. At the end of every meeting then, we have clear and actionable next steps to take at the individual and the team level. Keeping them all managed in one document allows us to be accountable to one another and to be prepared for the next conversation. And of course, one meeting tends to build upon the next meeting and the next meeting. So, we add new meeting notes to the same document each week, or however frequently we're meeting about a particular topic or for a particular client project.

Here's another example of a context where you might want to itemize instead of explaining: when you want to offer research highlights that your reader can quickly digest. So, here at Untold, we're oftentimes conducting literature reviews. We're gathering tons of articles on a particular topic and we're sharing those insights with our clients. For this reason, we take

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great care to organize our literature reviews so that clients can quickly glean the key takeaways from each article. We bullet the title, we include the summary or the abstract, and we bold information that we think is particularly important––the really key takeaways. We also include the most important quotes from the article and we do that by putting them in bullet-point form.

The goal here is that the client should be able to look through our literature review and get a refresher on all the conversations surrounding a particular topic. They should not necessarily have to do a deep dive into every single article until they're ready to take on that task. The most important thing to think about when it comes to itemizing and listing is that key concept of parallelism. You remember this from Level Two - Step Four, but parallelism is the act of ensuring that anytime you're presenting multiple chunks of information you're doing that in a way that helps the reader understand how they can be compartmentalized. So, when it comes to lists to make sure that your lists are parallel, you should make sure that they take on the same structure. Here's a worse and better example of how you can build lists for parallel structure.

Let's start with the worst example: "Here's our research plan: Number One: honing the research question. Number Two: search the health databases. Three: seek input. Four: first copy of manuscript. So as you can see, these list items are changing in structure--some of them start with the -ing version of the verb, some of them start with the present tense version of the word, some of them are actually noun phrases and they don't have a verb in a revised version. As you can see, every list item follows the same structure. We have an action verb followed by the task that's meant to be accomplished--so hone the research question, search the databases, seek input, draft in the manuscript.

If we were formatting this as an email that indicated next steps or next steps on a meeting note agenda, then we would assign specific individuals to accomplish each of these tasks––that way everyone is held accountable. But the point here is that whenever you're itemizing, you make sure that all

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of your list items are parallel in their structure. Now, just like with every other tip we offer in this course, I wanna say that there are times when you may not want to itemize information.

Here are the context clues that should help your brain send off an alert that it's a great idea to itemize: if the information you're sharing is uncontroversial, just facts, and easily skimmable. So, before you decide whether to write something out in paragraph form or itemize it, it's smart to take some time to reflect on the complexity of the information you're presenting. Ask yourself how controversial is the information--is this mostly factual or is there some persuasion that's involved, or are the ideas themselves skimmable, scannable, and easily digestible? Depending on your answers, you'll want to itemize instead of explaining.

Well done! You're flying through this level. Let's move on to Tip Number Three. Go watch the next video.