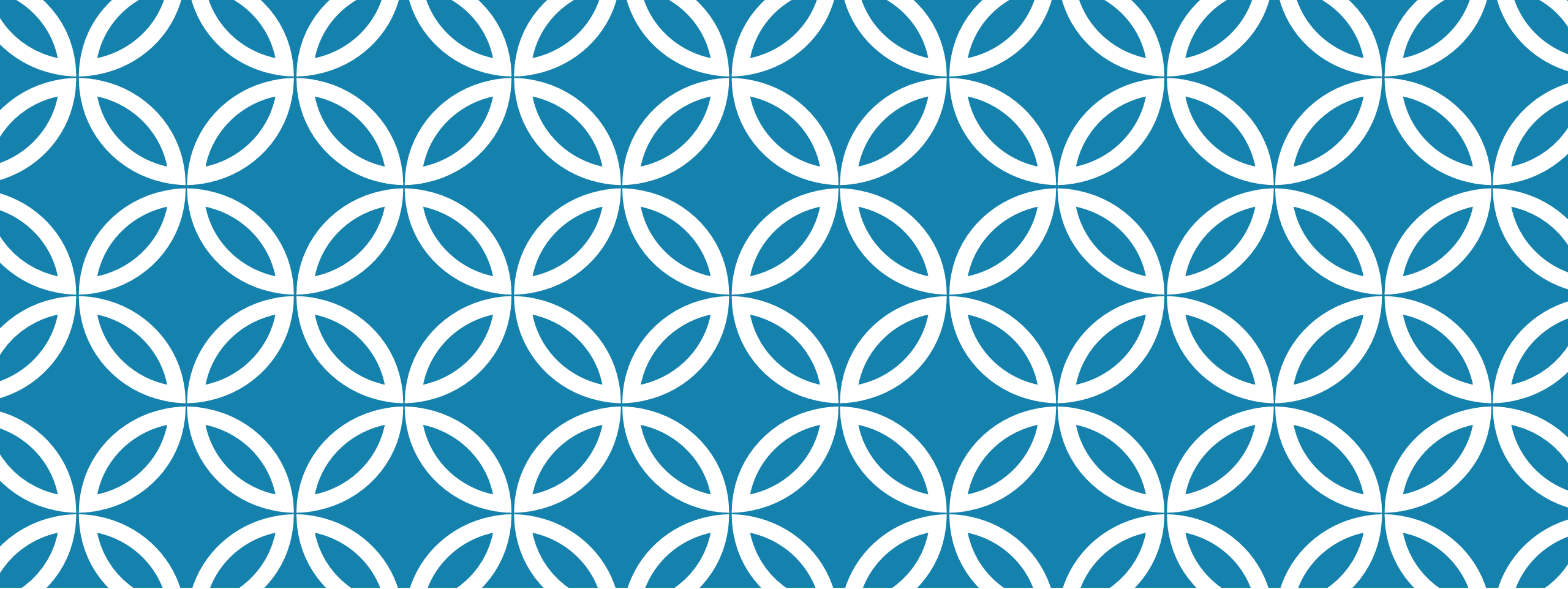




WRITING A BUSINESS LIST

Adapted from
<https://businesswriting.com/numbered-lists-and-bulleted-lists/>

WHAT IS A BUSINESS LIST?

- ❖ Bulleted lists and numbered lists in business writing help readers see and understand the list items easily.
- ❖ When lists are embedded in paragraphs, the list items are jumbled together in a mass of words.
- ❖ However, text that does not have a recognizable set of items is clearer when the text is in paragraphs rather than bulleted lists or numbered lists.

HOW TO KNOW WHEN TO USE A LIST...

❖ This explanation contains tips that will help you decide when to put business writing into bulleted lists or numbered lists and when to keep it in paragraphs.

❖ Follow these three steps:

1. Name the sections in your business writing with a **key word or key phrase** that describes the items in the list.
2. Decide whether **the section requires items** that pertain to the key word or key phrase name.
3. If the section key word or key phrase name does not require items, don't use a bulleted list or numbered list for the section. **Write the text in a paragraph.**

1. NAME THE SECTIONS IN YOUR BUSINESS WRITING

- ❖ Each section of your business writing explains a topic that is significantly different from the topics in the other sections. Give each section a name.
- ❖ The name will be a key word or key phrase you will use consistently throughout the rest of the business writing to refer to the topic in the section.
- ❖ Usually use the key word or key phrase in the heading for the section and early in the body of the section.

2. DECIDE WHETHER THE SECTION CONTAINS ITEMS THAT PERTAIN TO THAT KEY WORD OR KEY PHRASE NAME

- ❖ Some key words or key phrases in business writing require **items**. Examples are “conclusions,” “recommendations,” “locations,” “topics,” “items,” and so on.
- ❖ When you use the plural of these key words in your business writing, **the reader will expect to read a list** of whatever the name is. So write a bulleted list or numbered list.
- ❖ Use **a bulleted list** for items that **do not have to be in a specific order**.
- ❖ Use **a numbered list** for items that must be in **a specific order**, such as steps or a timeline of events.

3. IF THE SECTION KEY WORD OR KEY PHRASE NAME DOES NOT REQUIRE ITEMS, DON'T USE A BULLETED LIST OR NUMBERED LIST FOR THE CONTENT

- ❖ In this case, leave the text in paragraph form.
- ❖ The three numbered sections in this explanation are in a numbered list because they are steps.
- ❖ In your business writing, create a numbered list or bulleted list only when the key word or key phrase name suggests you need a list and the text contains items that fit with the key word or key phrase name.

EXAMPLES OF BULLETED LISTS OR NUMBERED LISTS IN BUSINESS WRITING

We observed Simon in the school setting on March 13. We noticed aggressive behaviour in the classroom and lunchroom. We believe we can identify the reason he is becoming aggressive in his relationships based on what we have seen. When we understand the reason, we will come to a solution that will eliminate the problem the parents have seen at home. There are factors we believe are important to note about such behaviour in children. Some of this type of behaviour is normal for a 6-year-old. Arrival of a new baby in the home will contribute to acting out. When a child is an only child and has been at home with only the mother, the separation can result in acting out as a way to be sent home. Family difficulties such as the impending divorce may also result in aggressive behaviour.

EXAMPLES OF BULLETED LISTS OR NUMBERED LISTS IN BUSINESS WRITING

Some writers would mistakenly attempt to use bulleted lists or numbered lists for all text in this business writing example. The result would be this:

- We observed Simon in the school setting on March 13.
- We noticed aggressive behaviour in the classroom and lunchroom.
- We believe we can identify the reason he is becoming aggressive in his relationships based on what we have seen.
- When we understand the reason, we will come to a solution that will eliminate the problem the parents have seen at home.
- There are factors we believe are important to note about such behaviour in children.
- Some of this type of behaviour is normal for a 6-year-old.
- Arrival of a new baby in the home will contribute to acting out.
- When a child is an only child and has been at home with only the mother, the separation can result in acting out as a way to be sent home.
- Family difficulties such as the impending divorce may also result in aggressive behaviour.

EXAMPLES OF BULLETED LISTS OR NUMBERED LISTS IN BUSINESS WRITING

- ❖ Putting all of the sentences into a numbered list or bulleted list makes the business writing more **difficult to read and understand**. Readers need formatting to show the parts of business writing.
- ❖ The **first section has no key word or phrase** describing the contents of the bulleted list, such as “factors.” As a result, the first section must **remain as a paragraph**. It does contain “things” or “facts,” but those names are **too general to require numbered lists or bulleted lists**. The writer should not have forced the business writing into a bulleted list.
- ❖ The second section is a list. The key word name for the list in the second section is **“factors.”** The writer realises **the text contains four items that are factors**. As a result, the writer must write the **second section in a bulleted list**.

EXAMPLES OF BULLETED LISTS OR NUMBERED LISTS IN BUSINESS WRITING

One acceptable format for the report follows, using a paragraph and bulleted list:

We observed Simon in the school setting on March 13. We noticed aggressive behaviour in the classroom and lunchroom. We believe we can identify the reason he is becoming aggressive in his relationships based on what we have seen. When we understand the reason, we will come to a solution that will eliminate the problem the parents have seen at home.

We believe the following four factors are important to realize about such behaviour in children:

- Some of this type of behaviour is normal for a 6-year-old.
- Arrival of a new baby in the home will contribute to acting out.
- When a child is an only child and has been at home with only the mother, the separation can result in acting out as a way to be sent home.
- Family difficulties such as the impending divorce may also result in aggressive behaviour.

MORE EXAMPLES

This is an example of business writing in paragraph form that has a list in it:

The Internal Conveyances Department performs important plant tasks each day. The department moves employees within the Rudolph Plant complex. The vans take employees from the gate to their work areas. Another function of the vans is to transport employees to storage areas to pick up supplies. Employees are also taken to areas such as the cafeteria and training rooms. In addition, Internal Conveyances Department delivers internal packages, tools, and inter-office mail. The Internal Conveyances Department has a staff of seven people. The vans receive regular maintenance, and the company replaces them every two years. Replaced vans are available for employees to purchase at a greatly discounted price.

MORE EXAMPLES

Example of overuse of the numbered or bulleted list for the business writing

This is an example of a revision of the business writing that is not correct. The bulleted list includes items that are not tasks:

The Internal Conveyances Department moves employees within the Rudolph Plant complex to perform the following tasks:

- The vans take employees from the gate to their work areas.
- Another function of the vans is to transport employees to storage areas to pick up supplies.
- Employees are also taken to areas such as the cafeteria and training rooms.
- In addition, the Internal Conveyances Department delivers internal packages, tools, and inter-office mail.
- The Internal Conveyances Department has a staff of seven people.
- The vans receive regular maintenance, and the company replaces them every two years.
- Replaced vans are available for employees to purchase at a greatly discounted price.

Placing sentences into lists indiscriminately **loses the value of the lists**. The reader cannot identify and remember the items in the lists that belong together.

MORE EXAMPLES

Example of appropriate use of a bulleted list for the business writing

In the example above, the writer can see that the last three don't fit in the list as tasks, so they should be in a separate paragraph. Each paragraph has a key word or key phrase name just as each list has. In this case, the last two sentences have the key phrase name of "other facts about the department." The change in name requires a change to a new paragraph. One acceptable format for the text follows:

The Internal Conveyances Department performs the following five important plant tasks each day:

- Moving employees within the Rudolph Plant complex
- Taking employees from the gate to their work areas
- Transporting employees to storage areas to pick up supplies
- Taking employees to areas such as the cafeteria and training rooms
- Delivering internal packages, tools, and inter-office mail

The department has a staff of seven people. The vans receive regular maintenance, and the company replaces them every two years. Replaced vans are available for employees to purchase at a greatly discounted price.

Effective Use of Bullet Points in Business Writing

Business writing must be concise, well organized, and formatted to ensure ease when scanning a document for important information. Bullet points can help business writers organize and emphasize information quickly and effectively. Consider the document's purpose and its intended audience, when deciding how best to convey the information using bullet points or other business formatting.

Effective bullet points rely on strong headings within a document. The effective use of headings signals the type of information your bullet points will cover, helps the reader identify key areas of information, and improves the reader's ability to scan for pertinent topics of interest.

The effective use of bullet points in business writing can help highlight important information, direct the reader to themed lists, and improve a document's overall readability. These simple tips provide a guide for using bullet points successfully in business writing.

The purpose of bullet points:

- Draws attention to important information
- Improves the ability of the reader to scan information easily
- Communicates information efficiently

How to use bullet points:

- Keep bullet pointed information short; each element in the list should be no more than two lines in length.
- Use parallel form when constructing bulleted lists. For example, use the same part of speech to begin each bullet.
- Make all bullet points approximately the same length and ensure that the format is consistent within each list.
- Use a strong heading to group related items together.
- Use the same font and margin width for each bullet point.
- Use periods at the end of each line only if they are complete sentences.

As with any formatting technique, overusing bullet points will detract from the overall goal in writing and formatting a business document. Bullet points should highlight important information only. Use them wisely to emphasize key information within the text.