Report & Portfolio Development

Gate 3 Reference Card

Introduction / Problem Statement + Abstract Draft

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The Governing Standard for All Content Gates

Treat your reader as a tired, cranky five-year-old.

They are brilliant and accomplished. They are also exhausted, cognitively depleted, and would genuinely rather be doing something else. Make your writing so clear, so structured, and so visually supported that they never have to work to understand it. Short words. Short sentences. One idea at a time. Hemingway, not Faulkner.

The Reader-Decision Architecture

Your reader makes a sequence of decisions about whether to keep reading. Every layer of your paper is a filter.

Level 1 — Metadata: Before They Open the Paper

Title · Authors · Journal / Venue · Date · Keywords

The reader decides whether to open the paper. Title, affiliation, and venue are credibility signals. Keywords serve search systems — but they determine whether the right readers find you at all.

Level 2 — The Abstract: Convert Browser to Reader

The reader opened the paper. They are still in triage. The Abstract has one job: give them a reason to commit. Five beats — no exceptions:

- Beat 1 — The problem. Specific. Immediately recognizable. First sentence.
- Beat 2 — The method that addresses the problem.
- Beat 3 — The data: what it is and what is distinctive or interesting about it.
- Beat 4 — Results: a specific highlight of what was actually found.
- Beat 5 — Implications / value: one sentence on why it matters to the reader's possible interests.

No field context in the Abstract. Every sentence earns its place or it goes.

Level 3 — The Introduction: Earn the Full Commitment

- Paragraph 1 — Problem Statement: specific, scoped, front-loaded. The hardest sentence. It will be rewritten many times.
- Paragraph 2 — Key Contribution: front and center, stated with confidence. Consider a framed box, tinted background, or bold formatting — make it unmissable.
- Approach — why this method for this problem.
- Data — what it is and what is distinctive about it. Data is part of the story.
- Results glimpse — a brief forward gesture toward findings, near the end of the Introduction. Tells the reader: the journey has a destination worth reaching.
- Roadmap — a brief statement of what each remaining section covers.
- Acronyms spelled out on first use in each section. Glossary table at the end of the Introduction for domain-heavy work.

At least one figure. Write your text around the figures. Captions must be self-sufficient.

The Playwright Model — Your Voice

Technical and scientific papers use third-person active voice. You are not the subject of the paper. You are the playwright — seated in the audience beside the reader, watching your work unfold on stage. The actors are the data, the method, the results, the analysis. They do things. They act. They reveal.

Active verbs for your actors:

Analysis shows... · The results indicate... · Applying [Method] reveals... · The model demonstrates... · Comparison highlights... · The data supports... · The findings suggest...

Never: 'I found...' · Never: 'It was found that...' · Never: 'The author determined...'

Five Questions to Ask Before Your Session

1	Does my Introduction open with the problem — specific and scoped — in the first sentence? Not history. Not field context. The problem.
2	Is my key contribution in paragraph 2, stated with confidence? Or is it buried somewhere in the middle, hedged and qualified?
3	Does my Introduction describe my data — and say something interesting or distinctive about it?
4	Do I have at least one figure? Does the caption stand alone — could a reader understand it without searching the surrounding text?

5	Do I have an Abstract draft? Does Beat 1 state the problem? Does Beat 2 introduce the method?

Three Ways to Come to Gate 3

There is no one right way to prepare. What matters is that you've externalized your thinking before the session — because the problem statement is already in your head. We just need to find it together.

Writing	Draft something — even rough, even wrong. Paste it into chat and we'll work from there.
Speaking	Go for a walk. Talk into a voice memo app — iPhone Voice Memos, Google Recorder, Otter.ai. Don't edit. Just talk about your project as if explaining to a curious friend. Convert to text and bring the transcript.
Visual / Spatial	Draw it. Boxes, arrows, clusters — whatever comes naturally. Take a photo with your phone. Upload it. Claude can read the diagram and help translate it into a written problem statement.

What to Bring to Your Gate 3 Session

- Your report uploaded to this Claude Project (.docx, PDF, or both)
- A draft Introduction — or a voice memo transcript — or a sketch. Any form.
- A draft Abstract — even just the first two beats.
- An honest answer to: what problem am I actually solving?

If you have nothing yet — come anyway. We will build it together in conversation.

What Claude Can Build With You — In This Session

- Figure 1 — a conceptual diagram of your problem and approach, generated from our conversation, delivered as a JPG ready to drop into your document.
- Graphical Abstract — a single compact visual summarizing problem, method, and key result. Increasingly required by journals. Delivered as a JPG.
- Keywords — a strong candidate list drawn from your problem statement and Abstract, distinguishing field-standard terms from emerging terms that may reach a different audience.
- Draft revisions — polished problem statement, tightened Abstract, restructured paragraphs. You review, adjust anything that doesn't sound like you or isn't quite right, and it's yours.

These are not optional extras. They are integral to Gate 3 — built while you still have energy, not deferred to a later session when you don't.

Canvas Confirmation Statement — Gate 3

After your Gate 3 session, record the following in Canvas and in your Appendix B AI Interactions Log:

Gate 3 complete — Introduction and Problem Statement reviewed with AI Portfolio Coach. Problem statement drafted/revised. Key contribution surfaced and positioned. Abstract draft initiated. Visual assets generated (Figure 1, Graphical Abstract, keywords). Session logged in Appendix B.

Before Gate 4:

Incorporate all revisions decided in Gate 3 into your document and re-upload to this Project. Gate 4 opens with a brief Gate 3 confirmation pass — and the question: did anything surface overnight?