Self-Guided Learning Program: UX Report Writing

Program Overview & Checklist

This program covers the three most important elements of effective report writing:

1. Logical structure & organization of ideas,
2. Clear & concise writing, and
3. Effective use of visuals & graphs

For each of these, you will dedicate four weeks to...

- **Learn** a framework or set of principles,
- **Apply** what you learned by revising a prior report and writing one new report,
- Get **peer feedback** from at least 1 other person, &
- Perform a **self-retro** at the end to reflect.

The program balances structure with practicality — it gives you concrete things to learn and steps to follow at a reasonable level of commitment.

This is entirely self-guided. The order of these steps is flexible, and the timeline is only a recommendation, so there are no specific dates or deadlines here.

The program assumes that you have some basic experience with report writing, and you write 1+ report per month.

Conceptually this could work equally for any type of business presentation, proposal, or conference talk.

The goal is to be able to check the following boxes at the end of three months:

Checklist

Organize information logically: The Pyramid Principle	Clear & concise writing: Smart Brevity	Effective visuals & graphs: Storytelling with data
Learn ☐ Read [Minto's Pyramid Principle](#)	Learn ☐ Read: [101](#) ☐ Watch: [Ted Talk](#) ☐ Read: [Daily newsletter](#)	Learn ☐ Read [Storytelling with Data](#)
Apply ☐ Revise old report ☐ Create a new report	Apply ☐ Revise old report ☐ Create a new report	Apply ☐ Revise old report ☐ Create a new report
Peer feedback ☐ Ask at least 1 peer for feedback on your new report	Peer feedback ☐ Ask at least 1 peer for feedback on your new report	Peer feedback ☐ Ask at least 1 peer for feedback on your new report
Self-reflection ☐ Spend 15 minutes performing self-retro	Self-reflection ☐ Spend 15 minutes performing self-retro	Self-reflection ☐ Spend 15 minutes performing self-retro

1) Organize information logically – The Pyramid Principle

Overview

The Pyramid Principle is a communication framework developed by Barbara Minto in her time as a consultant at McKinsey. Professionals across various industries use this framework to organize their thinking for proposals, reports, and presentations.

For UX Researchers, the Pyramid Principle provides a structured and principled method for organizing the ideas they plan on putting into their research reports.

Read more.

Learn

The best way to learn the Pyramid Principle is to [read the book](#) — in about ten minutes a day, you can easily get through this book in 4 weeks.

If the price of the book is too much, or you cannot commit to reading the whole book in a month, there are many guides and examples you can try to learn from for free online.

Regardless of whether you read the book, or study overviews online, I encourage you to take notes.

Apply

To practice what you've learned you will revise a past report and create a new one.

When revising a past report think about
- Identify areas for improvement by reviewing your past work.
- Pay attention to how you organized your thoughts vs. how they would be organized using the Pyramid Principle

- Were you systematic in structuring your key ideas and supporting evidence?

When creating a new report think about
- Practice on a new report to apply new knowledge and deepen understanding.
- Analyze your research normally, then think about the pyramid structure when synthesizing findings and preparing an outline.
- When applying the pyramid principle, start by identifying your key message and organizing key findings and supporting evidence on paper or a whiteboard.
- Play with multiple iterations and interrogate the logic and flow of your pyramid before writing the report.

Peer-feedback

Reach out to at least 1 person for feedback on the structure and logical sequence of the new report you've created. Ask peers familiar with the Pyramid Principle or whose reports you admire for their ability to create logical reports.

Here's an example of how you might ask:

Hi, I'm working on a new report and I thought you could give valuable feedback.

I've been practicing the Pyramid Principle to logically structure my reports. I would appreciate it if you could look at this draft and provide feedback.

Specifically, I'm interested in:

· Is the main message of the report clear and concise?
· Is the report well-organized and easy to follow?
· Were any of the points confusing? Did anything seem out of order?
· How was the use of evidence, data, etc. to support the key points? Was there anywhere that the use of evidence wasn't effective? Was there anywhere that I could have used more support for a key point?
· What could be improved to make the report follow the Pyramid Principle more effectively?

{provide link or attachment to draft report}

Thank you, {your name}

Self-review

At the end of each month, you should spend time for self-reflection; a dedication retro to review what you've learned, how you've improved, and how you can continue to apply what you've learned going forward.

You can use these questions to guide your retrospective each month:
- What did I learn this month?
- What improvements did I notice right away?
- Where can I continue to improve?
- How do I commit to continuing to apply what I've learned? What steps will I take to do this?

2) Clear & concise writing: Smart Brevity

Overview

Axios's Smart Brevity principles are guidelines for clear, concise, and engaging writing. Axios has leveraged these principles to build some of the world's most popular news briefings, and professionals from various industries have taken up these guidelines for streamlining their internal communications.
For UX professionals, Smart Brevity can be used when writing the content of their reports.
Read more.

Learn

To learn the principles of Smart Brevity you should review the following:
- Read the Smart Brevity 101 Guide
- Watch the TED talk
- Sign up for one daily Axios newsletter — Read it each day from a technical perspective. Note how they use headlines, emphasis, etc.

Apply

To practice what you've learned you will revise a past report and create a new one.

When revising a past report think about
- When revising your old report, focus on one thing at a time:
  - Improve headline statements.
  - Clarify and reduce the length of supporting text.
  - Revise to make it clear why the finding matters and what's next.

When creating a new report think about
- First, organize your findings using the Pyramid Principle
- Then, use Smart Brevity principles when you start writing or creating slides:

- Craft compelling headlines.
- Keep sentences short and use formatting to improve scannability.
- Emphasize the impact of findings and why they matter.

Peer-feedback

Reach out to at least 1 person for feedback on the structure and logical sequence of the new report you've created. Ask peers familiar with Smart Brevity or whose reports you admire for their clear and concise writing.

Here's an example of how you might ask:

Hi, I'm working on a new report and I thought you could give valuable feedback.

I've been learning Smart Brevity principles to make my written communication more concise and clear. I would appreciate it if you could look at this draft and provide feedback.

Specifically, I'm interested in:
• Overall, are the written portions of the report clear and easy to understand?
• Were the headlines and subheadings succinct and engaging, providing a quick overview of the content?
• Were there any specific sections or sentences that felt overly verbose and could be made more concise?
• Did the report clearly communicate the impact of the information presented?
• Were there any opportunities for further streamlining without sacrificing the report's integrity?

{provide link or attachment to draft report}

Thank you, {your name}

Self-review

Ask yourself:
- What did I learn this month?
- What improvements did I notice right away?
- Where can I continue to improve?
- How do I commit to continuing to apply what I've learned? What steps will I take to do this?

3) Effective visuals & graphs: Storytelling with data

Overview

Storytelling with Data, by Cole Nussbaumer Knaflic, outlines a process we can apply to create effective visuals that strengthen our reports.
For UX professionals, it provides a replicable process for planning how to present data in your reports.
Read more.

Learn

Like with the Pyramid Principle, the most effective way to learn the concepts of Storytelling with Data is to read the book. You can easily complete the book in under a month by dedicating just 10 minutes a day.
But again, if you're not into the idea of reading the full text or not looking to spend money on books right now, you can find a lot of content (blogs, podcasts, videos, etc.) from the author for free on the storytelling with data webpage.

Apply

To practice what you've learned you will revise a past report and create a new one.

When revising a past report think about
- Note whether you missed any opportunities to visualize information
- Review whether you used the most effective type of visuals
- Where could you have done a better job removing clutter & directing the reader's attention?

When creating a new report think about
- First, organize your findings using the Pyramid Principle
- Then, use Smart Brevity principles for your written content

- Finally, identify the supporting points that use numerical data and follow the steps of the Storytelling with Data process to identify your goal in creating a graph, pick the best type of visual, reduce clutter, and direct the reader's attention

Peer-feedback

Reach out to at least 1 person for feedback on the structure and logical sequence of the new report you've created. Ask peers familiar with Storytelling with Data or whose reports you admire for their compelling use of graphs & visuals.

Here's an example of how you might ask:

Hi, I'm working on a new report and I thought you could give valuable feedback.

I've been learning visual storytelling principles to improve the graphs I use in my reports. I would appreciate it if you could look at this draft and provide feedback.

Specifically, I'm interested in:
• What are your overall impressions of the graphs in the report?
• Do the graphs support and reinforce the key points of the report effectively?
• Do you have any feedback on the types of graphs used?
• Do you have any feedback on the formatting of the graphs?
• Were there any graphs that you felt weren't needed? Were there any missed opportunities for graphs where I didn't have one?

{provide link or attachment to draft report}

Thank you, {your name}

Self-review

Ask yourself:
- What did I learn this month?
- What improvements did I notice right away?
- Where can I continue to improve?
- How do I commit to continuing to apply what I've learned? What steps will I take to do this?