Tool 8

Case Study Template

A case study describes a product, service, or solution put into place to address a particular customer experience issue. Case studies are a great way to showcase and present results to key stakeholders within your organization. While case studies do not have required elements (they vary depending on the case or story highlighted), most do include the six main elements detailed below. In addition to showcasing your project, a good case study helps make the case for customer experience by illuminating the voice of customers you interacted with along the way.

PRO TIP – *Highlight the "aha!" moment. To generate excitement and increase engagement around your work, showcase the unexpected – such as interesting insights about customer behaviors or the time a hypothesis was proven wrong during testing.*

STEPS

SUGGESTED TIME
2-4 hours

ROLES
2-4 collaborators

MATERIALS NEEDED
template, pages 58-65
pens
paper
sticky notes

1

PROBLEM STATEMENT
Identify the problem you addressed. Explain how it was identified and why it's an important issue.

2

SOLUTION PROCESS
What process did you follow to generate, develop, and test your solution ideas? If you encountered any unexpected roadblocks along the way, how did you overcome them?

3

PROTOTYPE GALLERY
Showcase any prototypes you developed and tested with customers. What tools and resources did you use? How did these prototypes help evolve your work?

4

RESULTS + NEXT STEPS
What was the impact of your solution in terms of customer experience or other metrics? How did you define and measure success? What next steps have you identified to build upon your work? How can your organization benefit from continued exploration of the customer experience solution?

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Case Study Template (1/4: problem statement)

PROBLEM STATEMENT What's the customer need or problem your solution sought to address? Who was involved: partners, customers, other stakeholders? What were the key relationships?

REGIONAL CONTEXT From your research, what were key regional factors – regulatory, cultural, political, other – that contributed to or related to the problem? How did this context ultimately impact the way you approached your solution?
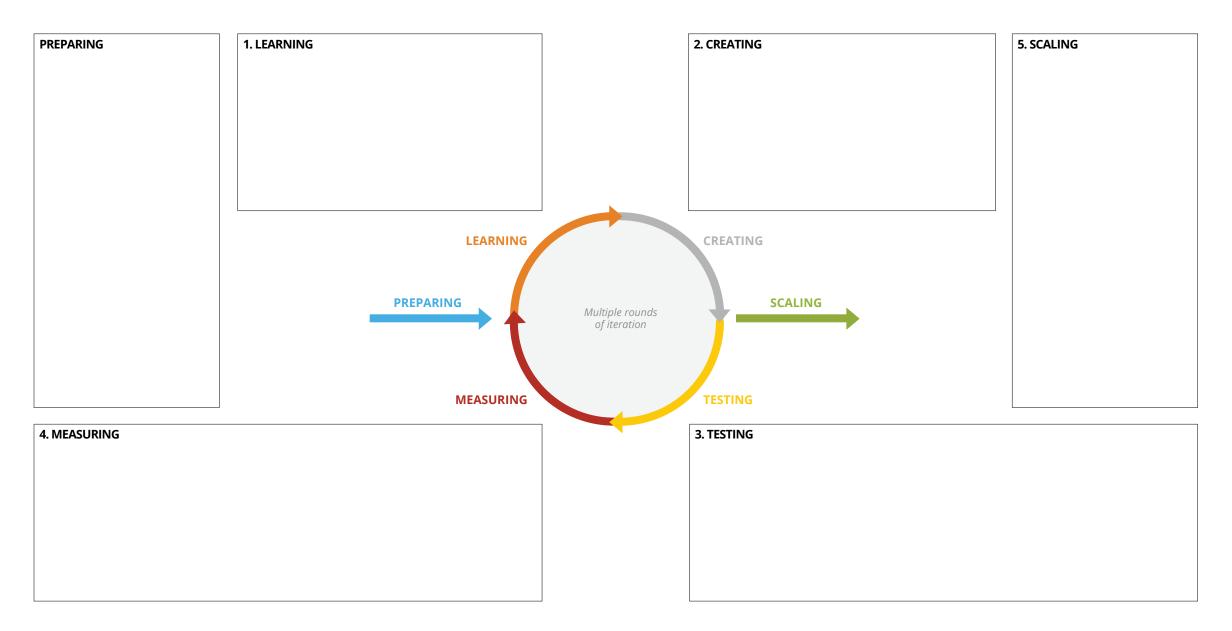
INITIAL RESEARCH OVERVIEW
Include a summary of your initial research strategy. Where did you go and who did you speak with? How did you adapt your process as you uncovered new information about the situation? What were the key customer insights that helped you identify the need or problem to address?

# Interviewees	Interviewee breakdown	Locations visited	Time spent in the field

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Case Study Template (2/4: solution process)

PREPARING

1. LEARNING

2. CREATING

5. SCALING

LEARNING

PREPARING

CREATING

SCALING

Multiple rounds of iteration

MEASURING

TESTING

4. MEASURING

3. TESTING

Tool 8

Case Study Template (3/4: prototype gallery)

	PROTOTYPE 1: _____	PROTOTYPE 2: _____	PROTOTYPE 3: _____
CONCEPT Describe your prototype and its key features. Who's your target user?			
DESIGN AND PRODUCTION What materials did you use to create your prototype? Did it involve physical artifacts? A physical space? Person-to-person interactions?			
TEST METHODS How did you set up and test your prototype? What were key assumptions, questions, or performance metrics? How did you define success?			
STATUS How did your prototype evolve during the process? Is some version still in use or did it prove unsuccessful?			
DOCUMENT YOUR WORK Describe the results of your prototype: details that surprised you, hypotheses that were invalidated, stories worth sharing, etc.			

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Case Study Template (4/4: results + next steps)

RESULTS What was the impact of your prototype trials in terms of customer experience or other metrics? Which prototypes were successful and which failed? Why? Which ones show promise for continued development?

LEARNINGS What are the big takeaways from your project? Do you have unexpected test results or surprising findings to report? How do learnings relate to your organization's customer experience practices in general? What are the ways your organization may benefit from continued exploration of the customer experience solution?

Near Term

Medium Term

Long Term

NEXT STEPS
What plans or next steps have you identified to build upon your work?