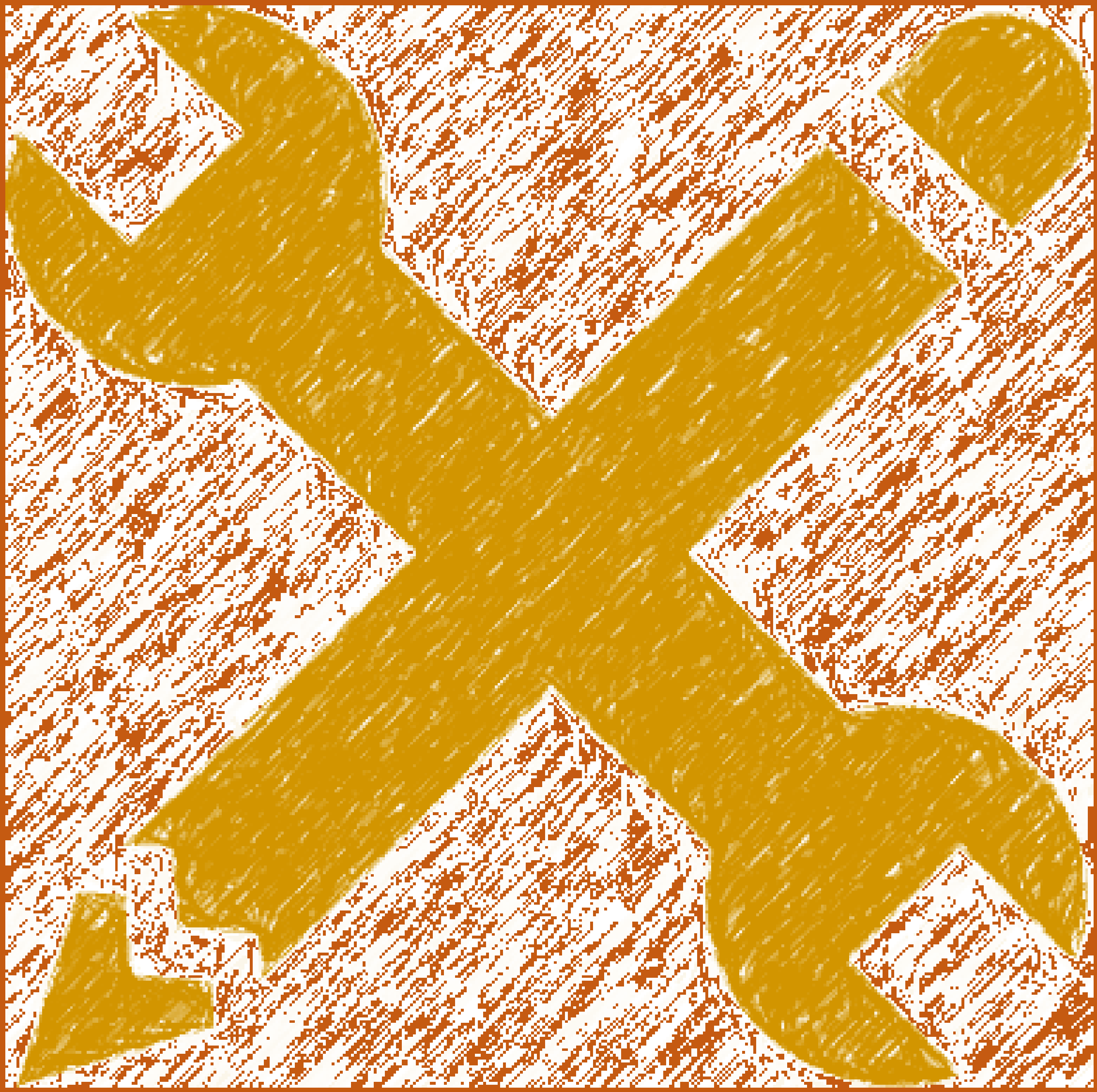


On making a toolkit

This guide is a meta-knowledge product – a toolkit to make a toolkit. It provides a framework to approach the process, questions to consider, and tools for implementation. This guide focuses on user experience best practices; while these considerations are often used for building online tools, they are important design criteria in any knowledge product. As always, a toolkit is just that – a toolkit. Someone must harness the tools within, so freely adapt the learnings within to your own needs. For questions or feedback, contact Minahil Amin at mamin@ashoka.org.

Contents

User Needs and Goals Analysis - Problem Definition

What problem are you trying to solve with this toolkit? What need are you addressing? What questions are you answering?

- ☐ Understand your audience
- ☐ Identify key stakeholders
- ☐ Develop your design criteria
- ☐ Identify constraints
    - Time
    - Cost
    - Scope
- ☐ Identify metrics – how will you assess the success of this toolkit?
    - This scale gives some useful proxies for measuring the use of a web resource:

      Proxy Scale

      Loose Proxy

      - page view (google analytics)
      - time spent per page (google analytics)
      - whether resource was favorited (facebook? linkedIn? twitter?)
      - was this tool useful? (button)
      - **sharing** (via facebook or e-mail recommendation tool?)
      - **follow-up email directly asking if they used resource to any extent and to rate it**
          - response rate concerns (survey)

      Tight Proxy

It can be helpful to think in iterations – "Toolkit 1.0 looks like ____. Toolkit 2.0 has ____ in addition." You can also think about your goals in tiers – basic, optimal, advanced.

Related documents:

FBL Toolkit Framing

FBL Toolkit Vision

Toolkit RA Renewal

Tiers of the Vision

Measuring Usage of FBL Toolkit

FBL Metrics – Key Performance Indicators

Project Management System

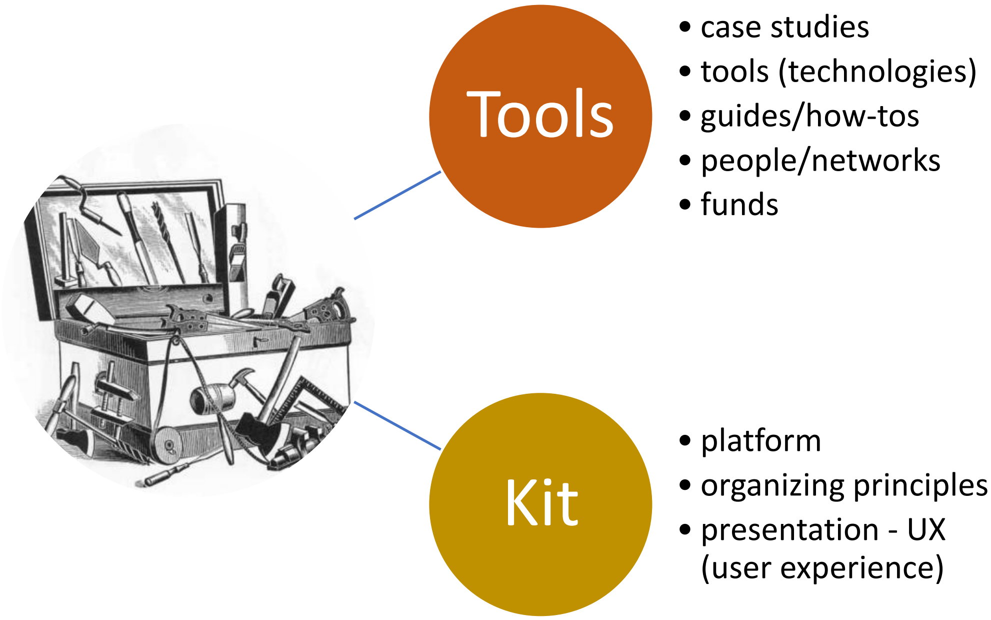
Establish a comprehensive project plan with a timeline, milestones, deliverables, and assignments of responsibilities and deadlines. For collaborative projects, who is doing which tasks and when? What are your key dependencies (what tasks have to be done before others)?

- When there are a lot of moving pieces in a project, it is helpful to break the project plan into different sections (for example: knowledge collection, toolkit design, and network activation). If possible, assign a project lead to each section, so that somebody is thinking about each aspect of the overall plan for the entire duration of the project.
- Having a shared document of weekly action items allows everyone to be aware of total progress and to minimize delays, especially for dependencies – when you're waiting on someone to finish their part so that you can start your part
- DOCUMENTATION IS KEY in order to minimize redundancy and save time. Keep a running document of key notes from meetings. Google Docs has a Table of Contents feature that makes it easy to include a series of meetings in one document.
    - A helpful tip for keeping a running meetings doc: when tasks are assigned to people during the meeting, highlight their names and the task. Then at the end of the meeting, have the meeting facilitator/head send out an email to the participants with their immediate action items.

Related documents:

FBL Toolkit Project Plan

FBL Meetings Iteration Doc



The How

A toolkit is comprised of both tools and kit.

Tools

What type of content do you intend to include in the kit? It's important to identify this first, as the content is what you're ultimately trying to deliver to users, and content can also affect how you choose to organize your toolkit. Note that at this point, you're not actually gathering/generating content, you're just identifying what kinds of content you want to include.

Kit

- The platform – for an online resource, selecting the platform is key. The selection should take into account the user needs analysis from earlier, along with your group's financial and technical constraints. *It is key to select the platform early on*, so that you are aware of your technical constraints in design and presentation of the tools. Examples of platforms include: Wordpress, Drupal
- Organizing principles – how are you going to organize your resources? How will users navigate through your toolkit? Some options include:
    - Tagging – where you identify some categories like geography, sector of work, time requirements, etc and tag all your resources accordingly. These tags can help users search and filter resources.
    - Filters – if you have a large number of resources (over 50), which would make it too time-consuming for a user to browse through, then filters (based on the tagging categories) are a good option. Example of a filter (also known as faceted navigation):

- 

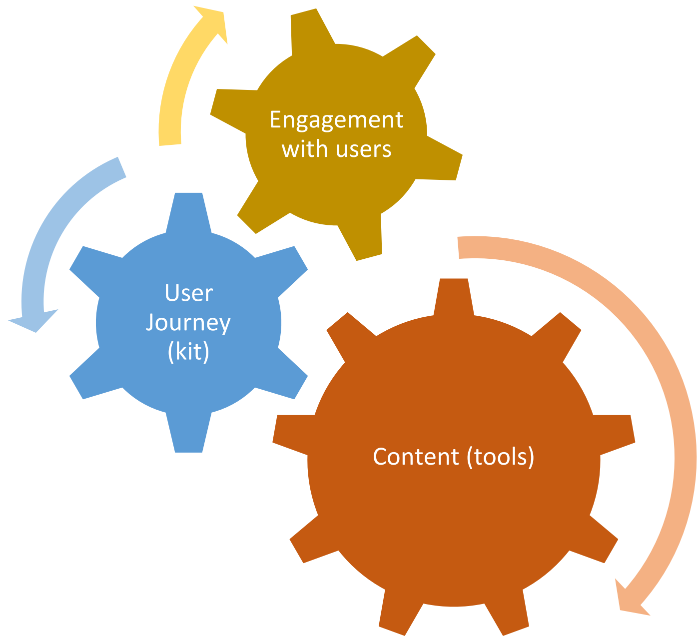
- Presentation – how are you going to present your resources? On a resource page, what information will be present, in which order? For example, for a FBL case studies page, we included an image, brief description, problem, solution, impact, lessons learned, and link to more information. We had **word counts** for each of these sections. This allows content to be standardized in an accessible format for users.
  - One method to design and test the user's journey through your toolkit is called wireframing. Wireframing is "an image or set of images which displays the functional elements of a website or page, typically used for planning a site's structure and functionality." One of the tools we found very helpful and easy to use in building a mock-up of our website was UXpin:
  - http://app.uxpin.com/07fa7b6339d2cd835af9da645d7ee62414bc32a6/10339139 - (be sure to click the wide website tab at the bottom)
- There is much more on organizing principles and presentation under the user journey section.

Related documents:

Selecting a platform – Platform Criteria Doc

Organizing resources – filters

How to present a case study



Content

Questions to consider:

- Are we generating our own content or are we compiling content that already exists?
    - If we are gathering existing content, are we simply linking out to it or reformatting it to present on our site?
    - If it's first-hand information, for example interviews, it's useful to have a standard set of questions and a structure for the conversation beforehand.
- Where is the content being stored (until it is published on the site)?
    - For the FBL toolkit, we used a comprehensive Google Spreadsheet. We had separate sheets for each type of resource, with links, tags, and assignments of responsibilities (who would write up the content for each particular resource)
    - We used another spreadsheet to serve as a ready-to-upload database. Once we had decided on the different sections we would include in each resource page, we filled in these sections for each resource on a spreadsheet. So for example, we had a sheet for case studies, with a list of all the case studies, along with their descriptions, problems, solutions, impacts etc (constrained by the wordcounts we set earlier). *It's very useful to create templates for content beforehand.* See the "case study format" section in User Journey below

Related documents:

[FBL Resources overview spreadsheet]

[Database of resources]

	A	E	F	G	J	M	
1	Name	Stage of Loop	Sector	Location	Description	Problem	Solution
2	EXAMPLE				100 words	250 words - what is the context and why is there not a strong feedback loop?	250 words - h loops and ho issue?
3	Labor Link			Asia	Labor Link utilizes mobile phone surveys to collect information and opinions from workers and farmers around the world. Survey participants call a local number and answer voice recorded questions using their telephone keypad. Responses are collected in real-time, aggregated, analyzed and returned to partners at mylaborlink.org. Labor Link can also broadcast content to survey participants on any topic. Workers and farmers pay nothing to interact with Labor Link and can do so at a time and place of their choosing.	In April, 1,100 workers were killed in a factory collapse in Bangladesh. Why? Because those workers were invisible. When they saw cracks in the walls, they had no channel to report it to the companies buying the clothing they sew, and hence no way to stop this totally preventable tragedy. Millions of low-wage workers endure poor working conditions everyday and suffer in silence because they have no way to communicate with decision-makers.	Labor Link g anonymous phones - to opinions anc voice-based and runs in a short, multip educational local service working con wages, as w services, he community r actionable re decision-ma
4	Integrity Action: Closing the Loop			Africa, Asia, Middle East, Europe/Central Asia			
							The idea is t the local aut

Case Study | Guide | Tool

A question from the user – which tools should I use?

User types

Depending on the breadth and depth of content in your toolkit, it can be difficult for the user to know which tool is right for their context. Filters and tagging help with this. Your needs assessment helps you understand which users would use which tools, but it can be helpful to further segment your users:

Fig. 1: Segment User by Level of Knowledge

Audience	Stage	Challenge	Desire	Example
Learner	Doesn't know anything	Unfamiliar	Learn and Know	
Actor	Familiar	Doesn't know how to act	Act	
Troubleshooter		Running into problems / Stuck	Troubleshoot	
Improver			Improve	
Sharer		Alone, doesn't know what's next	Scale and Share	

Self-assessment (the quiz)

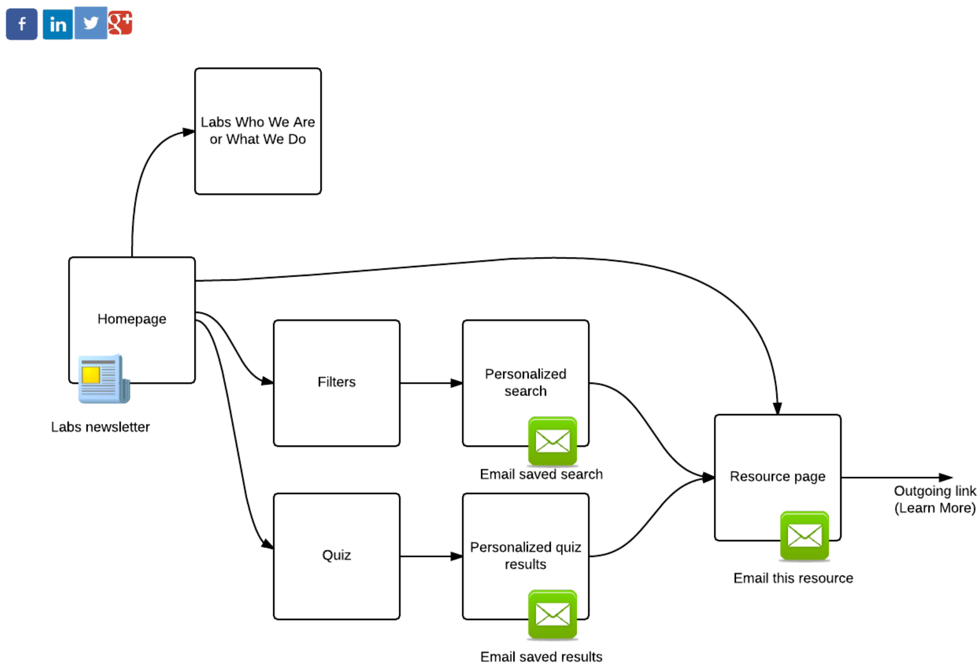
One common solution to the "which tools" question is a self-assessment that points users at relevant tools. In the FBL toolkit, we used a quiz.

Learnings from other toolkits

- https://innovation.govspace.gov.au/tools/diagnostic-tool/2/
    - pros: nice visual, explains strengths and weaknesses and suggests tools based upon these
    - cons: not aesthetically appealing
- Deloitte Business Chemistry Quiz - screenshots -
    - https://docs.google.com/presentation/d/18MHlEcl1KO48aD_Ty3iESaVSRZKz_Ye_5bZGla1rvt4/edit#slide=id.g350a434c1_018
    - https://docs.google.com/document/d/1QXQ6d0-7tQKzh_hlrKO8rKpTq3iODitYyi9mza0QocU/edit
    - Sliding scale was a nice feature
    - built on a custom application based on .net and sql server
- Business readiness for China - http://www.eusmecentre.org.cn/quiz/results/886
    - Pros: very specific tips, color coding of strength and weakness areas
    - Cons: isn't necessarily a con, but it's very technical - is clearly meant for a narrow audience
- Misc
    - An interesting article about quizzes and sharability: http://www.slate.com/articles/life/culturebox/2014/01/buzzfeed_quizzes_taking_over_facebook_feeds_what_makes_them_so_shareable.html
    - It is ideal to have a breakdown of how participants' answers translate to the results
    - Integration with social media would be a good idea for the site in general (fb page/group); additionally, creating clear, high-visibility sharing options on the quiz results screen could push site further
    - Quiz platforms
        - Qualtrics
        - ProfPro

User Journey

Map out the User Journey



Negative User Journey

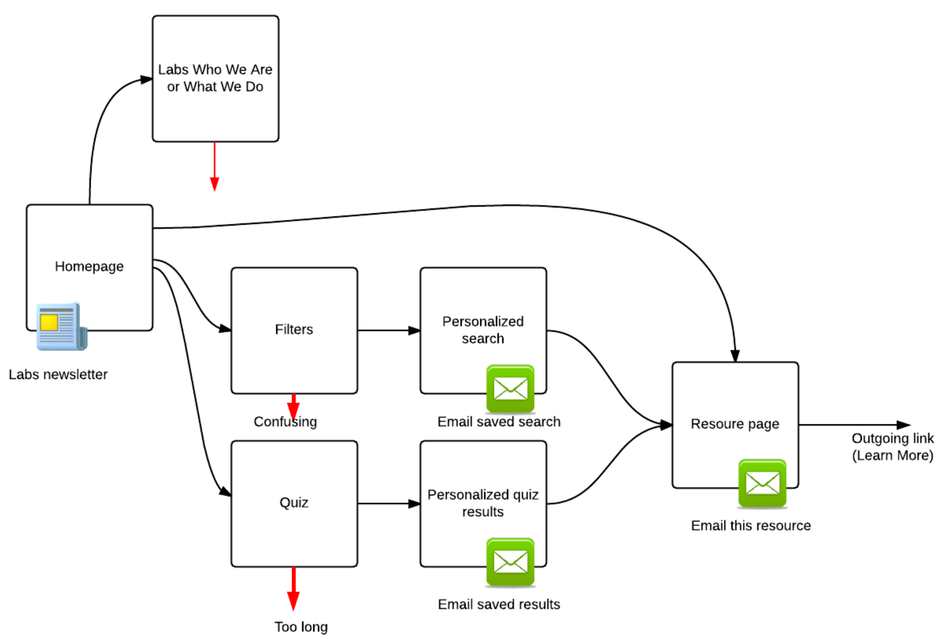


Table format of map:

	Homepage	**Filters page**	**Case study page**	Overall
What we want them to KNOW				
What we want them to DO				Eg/ give us their email
Action Buttons				

Basic Research

The landing page

- Articles on the elements of good homepage design with examples - http://blog.hubspot.com/blog/tabid/6307/bid/34006/15-Examples-of-Brilliant-Homepage-Design.aspx
- Infographic on features of a good landing page - http://blog.kissmetrics.com/landing-page-design-infographic/
- An article that aligns with our thinking in regard to engaging users - https://getsatisfaction.com/corp/product/
- Examples of long-form pages with great design - http://www.dtelepathy.com/blog/inspiration/20-examples-of-long-form-content-with-great-ux-design

Themes

- Clarity and few choices (for lower cognitive load)
- Contrast (make use of light/dark colors, and make interactive features change as you hover over them – like links and search boxes)
- Small Bites
    - We don't read web pages, we scan them. People absorb more content if the page is easy to understand in small bites. Content is also easier to share across social networks when it's tightly packaged.
- How to make a page scannable:
    - Words – use simple terms
    - Sentences – short and to the point
    - Paragraphs – focus on a single idea, break up the page
    - Bullet points – visualize lists
    - Spacing – use white space liberally
    - Headlines and Subheadlines – give a quick view of content
    - Inverted Pyramid – lead with most important points (within pages, paragraphs, and sentences)
    - Images – worth a thousand words

- A clear call to action
    - The homepage UI should invite visitors to stay, explore, or take action. The call to action (CTA) lays out what the user is expected to do. Users anticipate receiving this guidance on a homepage.
    - How to design a great Call to Action:
        - **Make it stand out.** Size, color, and surrounding negative space can help focus attention on the CTA.
        - **Use a clear label.** Use a precise, active verb. “Join now” is better than “memberships.”
        - **Make it look clickable.** A button with contrasting color works well.
        - **Limit the number of choices.** Many sites only need one CTA on the homepage. If more choices are necessary, pay attention to the positioning within the page. Often, placing a few calls to action in close proximity improves clarity, and helps users compare options.

Navigation

Understand that when you come up with labels for categories of information, they might not mean the same to others as they mean to you.

USER-TESTING LABELS

- So what is the easiest way of doing a sanity check of the way you express the information space? A really cheap and well-proven technique is Card Sorting. By using card sorting, you can transform your early taxonomy prognoses into folksonomy. Card sorting not only helps you to create an informed information architecture, it also enables you to get an insight to what keywords users relate to different activities in your product.
- Another test is a Word Association game. Take all potential labelings of your navigation design and try them out on users asking them to “say the first thing that comes to mind” (in regard of what they believe to be found beneath such a navigation option—call it Think-Aloud Protocol with a twist. For example, you could say “Products” and the participant might respond with “Price, description, information, stock”. Market researchers have used this technique for decades to ensure that the right message is conveyed by their target audience when promoting products.

- **Two important questions** that you need to find to an answer to at this stage are:
    - Can the users relate the labels in the navigation design to their explicit goals of exploring your digital product?
    - Are the meaning of the words metaphorically and visually separated enough not to be confused with each other?
- http://www.smashingmagazine.com/2012/03/20/the-elements-of-navigation/

Articles on General Principles of UX design

http://thenextweb.com/dd/2013/08/17/13-ux-design-practices-startups-shouldnt-overlook/
Here's a link to Paul Ballas’s twitter and an article he promoted there on UX and engagement
https://twitter.com/paulballas
http://www.usabilityprofessionals.org/uxmagazine/ask-less-get-more/

Learnings from Existing Toolkits

Also see [Existing Toolkit Usability Research spreadsheet]

- What does an ideal user journey look like
    - Design:
        - Minimalist, clear design with good use of white space
        - Allow users to focus on content
    - Includes a basic description of the purpose and audience of toolkit on the homepage:
        - Toolkit usage
        - Target user
    - Toolkit navigation:
        - Index or matrix
        - Pop-up list of tools
        - Search bar
        - Toolkit filter (by evidence, cost, time frame, category/field, region)
        - Brief explanation for each tool
    - Videos (if included at all on landing page, should be short):
        - Toolkit introduction
        - Tool tutorials
    - Case studies:
        - Navigation:
            - By region
            - By category/field
            - Search bar
        - Consistent format
            - e.g. project leader name, organization, country, region, problem, why and how they used the tool, results, tips for other people, tags
    - User Feedback
        - Feedback submission form
        - Tool impact assessment
        - Provide way for users to rate, approve tools (although you have to be careful with ratings, because they can lead to some good tools being underutilized)
    - User community
        - Discussion board
        - User information
            - Search bar
            - By region
            - By category/field
        - Note that building a user community within your toolkit can be very resource-intensive – using external methods to accomplish community is more feasible
    - Other resources
        - Reports, articles, presentations
        - Data
        - Experts, buddies
        - Software
    - Events for engagement
        - Online: webinars
        - Offline: networking events, conferences, training sessions

- Types of Resources
    - how-tos
    - case studies
    - tools (as in actual technical things)
    - methodologies? - could this be reframed as how-tos?

- Features from other toolkits
    - a single, really well-done filter for all resources - http://educationendowmentfoundation.org.uk/toolkit/
    - map-style - but this only seems to work for case studies - www.hcdconnect.org
    - question-answer style - this works for tools and how-tos but it would require a lot of work on our part in terms of figuring out what the right questions are - http://diytoolkit.org/tools/

- External help
    - Web design
    - Video recording and editing
    - Data management and analysis
    - Marketing efforts
- Questions:
    - Do we want to add fee-based services?
    - **Can users edit/contribute directly to toolkit?**
    - Do we need further research? E.g. specific toolkit features?
- **Key takeaways**
    - Minimalist designs - aesthetically clean
    - Clear concise definition of goal and audience
    - Clear navigation
    - User guidelines - which situations to use which tools in
    - Estimates of time tool will take to use
    - Ability to login and join, create profiles, share projects
    - Crowdsourcing case studies (map)
    - Filterable case studies
    - Concise information with ability to dig deeper
    - Ease of finding toolkit - dissemination
    - The bad
        - One-way communication
        - Text only
- Other considerations
    - Focus on dissemination
    - Embedding it in some sort of culture/high-traffic site/event - something that will give it visibility
    - Be sure to get enough feedback from actual users during wireframing phase
        - Make sure that you don't run out of capacity to do testing and iterating after the first launch
    - Keep engagement strategy in mind from the beginning

Notes from UX session with UX expert from Deloitte

- nix the stand-alone community
    - meaning that technically and otherwise, creating a community from scratch is not worth the investment, at least not initially
    - it makes more sense to create a linked community via social media
- the quiz
    - initially, he advised that we keep the quiz and maximize the personalization of the results page, ensuring that suggested resources are clearly correlated with quiz responses
    - however, when we spoke about our goals of usability and getting our time-constrained users to engage, he said to move the quiz to the backburner
        - present quiz as a "don't know where to start, click here" option on the side
        - make the entry page a clear portal to the knowledge resources
            - maybe highlight key/featured examples on this page
            - search bar on side (faceted navigation)
            - good tagging is key
        - citizen media toolkit as an unsuccessful attempt to achieve this point?
    - thought the slider was a good idea
- engagement
    - at some point in the process, have a way to collect emails - either in order to download resources or as a subscribe option or both
    - set up an automated ping encouraging users to review/rate the resources they accessed and also to contribute their own
    - could also put reminders through feedback labs listserve
- build as you go
    - focus on creating really clean, useful knowledge
    - then add in additional features (eg/ offline events, community aspects, etc)
- resources he recommended us to peruse
    - www.causeiq.com
    - patterntap
    - calltoidea
    - foursquare.com map view
- How do we best guide people to resources, keeping in mind that they may not know what they are looking for?
    - Implications for library?
    - Assumption: you're coming to this website with certain criteria in mind already
    - will give us case studies - coworker in human/computer interaction
- What does the landing page look like? Home page?
    - 1 - featured content - can target certain groups by spotlighting them
    - 2 - option to browse the list
    - 3 - the quiz
    - you need explanation of your value proposition before you ask people to take the quiz
    - current homepage is not useful (07/22)
    - <u>Don't Make Me Think</u>
        - UX designer's Bible
        - has some stuff on homepage best practices
- How to best leverage the quiz?

- Pledge
    - inhibitive to user interaction if placed at first entry point - no-no; incorporate it after a delay, or after they find a useful resource
    - you have to form a relationship about the user before you can ask them to pledge
- Our ultimate goal is to get people to *act upon* these resources. How do we track/estimate whether they have done so? (proxy scale)
    - make call to action in-your-face
    - user journey map
        - ideal - user searches, finds, downloads
        - negative - user searches, does not like, goes back
    - put breadcrumbs up top on individual resource pages
    - make sure filters are remembered when individual clicks back
    - iconography for case study page (currently too text heavy)
    - can collect email after users preview resource and want to see more
    - collect email submitted page should have, "The resource is being sent to your inbox right now! Here are some related resources:"
- Best (and most efficient) way to test the usefulness of the design?
- Thoughts on filters wireframe? Can it be made more intuitive?
    - Is it better to have all the resources displayed before people filter or to have a blank page – see Resources V2.2?
    - Should we have static boxes with a full summary display or expandable boxes with a partial display? In other words, do users care more about seeing more options on screen or having to click more? Answer: they generally like to see more options on screen
- What is the point in the user journey at which a user is invested enough to hand over their email?
    - make them give their email to access a resource after they see the description
    - make only featured content freely-viewable, to "unlock" rest of content, they need to sign-in/give their email
    - when they click learn more link

Filters

Examples

Clean and functional

- http://educationendowmentfoundation.org.uk/toolkit/
- http://patterntap.com/pattern/library-treehouse
- http://patterntap.com/pattern/issues-pattern-tap-sifter-0
- http://search.trln.org/search?Nty=1&N=0&sugg=&source=trln&Ntt=test&Ntk=Keyword - more filters - the consortium's goal is to connect students and faculty with the best materials, regardless of which university owns them.
- https://www.causeiq.com/search/organizations/?q=education - prioritized filters

Tags

http://patterntap.com/pattern/company-filter-google-ventures
http://patterntap.com/pattern/tag-filters-siteinspire

More than just text
http://patterntap.com/pattern/filters-artsy
http://patterntap.com/pattern/filters-evolution-fresh

Tips

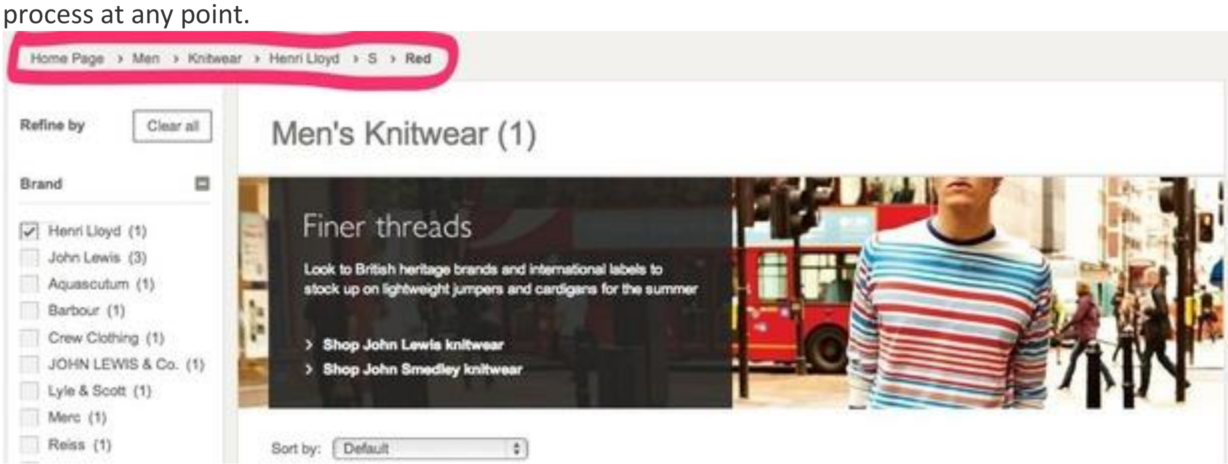
Placement of the filters (faceted search)

- Left is best
- Big sites like Amazon, eBay and Google put faceted search on the left. These sites probably have more visitors than you do. When big, influential sites do things a certain way, that creates a certain pattern of expectation for users. They expect you to do things the same way those big sites do it. Another compelling argument for putting faceted search on the left is that the left half of the page gets more attention than the right half. If you want your filters to be noticed and used, put them on the left. Apple does it too, on their website and in iTunes.
- You can put faceted search at the top, but it's not as good as left. Mainly because it pushes everything on the page down. Which means less of your products are visible above the page fold. And even though people definitely scroll, they spend 80% of their time above the page fold.)
- Stay away from the right
- During our own user tests we often see that faceted search on the right side of the page is ignored by about half of the test users. People don't look at the right side of the page very much, not even when you put the search filters there.

Indicating which features are active

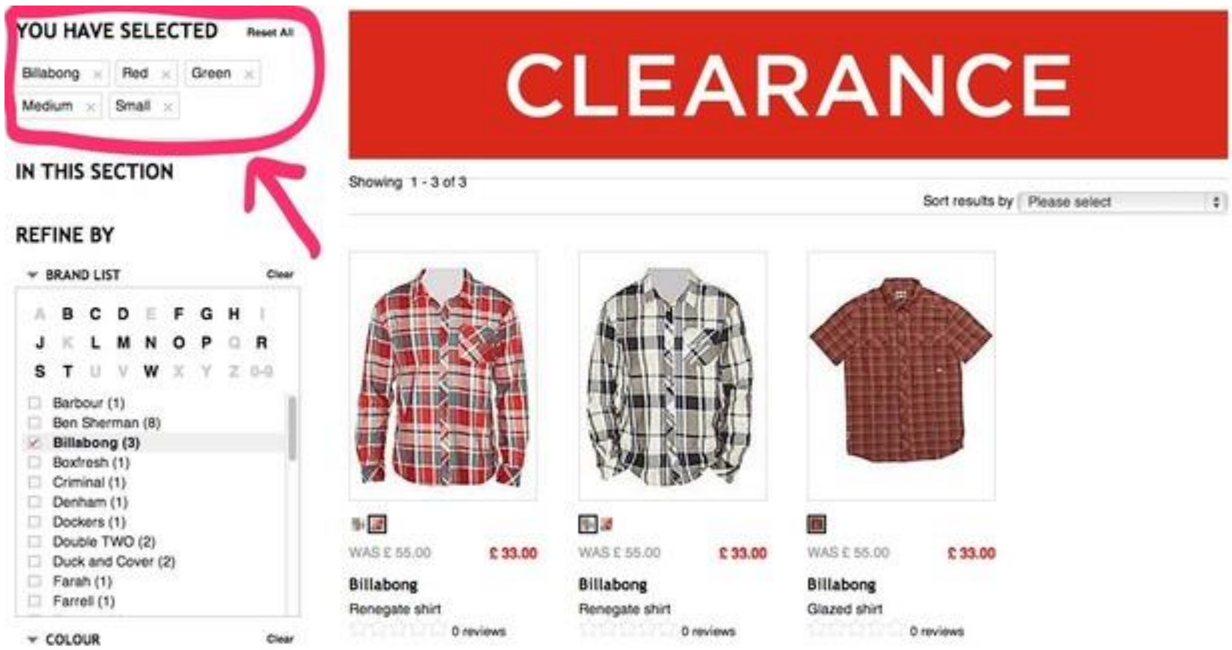
- The best way to indicate which search filters are active is by making them stand out visually.

Show the features selected in a breadcrumb trail

- Breadcrumbs are commonly used to remind users of the route they've taken as they navigate through a website, but they can also be used to show product filter options.
- John Lewis highlights each filter that shoppers have selected so they can easily click back in the process at any point.
- 

Allow users to select more than one filter and Make it easy to add and remove filters

- If a customer doesn't get the product options they were hoping for then they'll want to quickly modify the filter. Therefore it's important to allow people to remove filters with one click.
- Once you've applied a filter on House of Fraser's site it can be removed simply by clicking the small cross.



- Put filters in collapsible menus
- It's unlikely that users will want to apply more than two or three filters at most, so you need to make sure they can hide the ones that aren't relevant.
- Collapsible menus allow shoppers to pick the filters that they need while ensuring the screen remains free of clutter.

Progressive Disclosure

- People can only digest small bits of information at a time. For complex sites with deep content, it is helpful to simplify. Progressive Disclosure offers short summaries with the option to expand more detailed content. This allows users to understand what is available, and select the most appropriate option.
- Progressive Disclosure has been applied by creating a multi-tiered approach that requires users to click and load several screens. In many cases, this approach reduces usability. However, usability is enhanced by giving users a simplified starting point before deeper content exploration.

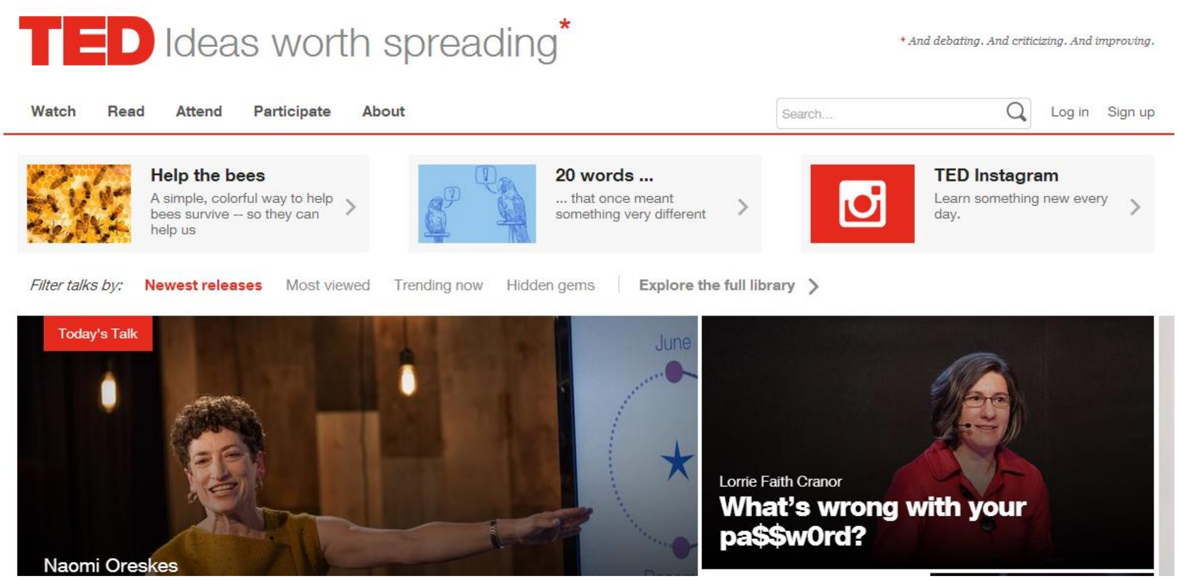
Optimal number of filters

- There are no widely agreed upon recommendations for this issue. There used to be a rule of thumb to have 7+/-2 items in any type of menu, but that has been debunked as a UX "myth."
- In regard to sorting filters into basic and advanced options: "these need to be carefully researched to identify what the basic research criteria should be. Then you have to carefully design the filter to fit each criteria."

- Mainly - it depends: “It depends on the visual relationship between the underlying screen content and the drop down content; it depends on the scanability of the list data; it depends on the sorted state of the items and the distribution within the sort key range.”
- http://ux.stackexchange.com/questions/22277/best-ui-for-filtered-search-with-many-filtering-options-as-opposed-to-single-tex
- http://ux.stackexchange.com/questions/31738/what-is-the-maximum-recommended-number-of-item-to-put-in-a-drop-down-list

Additional research on the presentation of knowledge online and landing pages

- brainstorm of other types of knowledge resources online:
    - encyclopedias - most of these have pretty bad browsing functionality - you have to know what you’re looking for
    - ted talks
    - news sites - these are sorted by commonly accepted categories - most of the top news providers have really bad archiving/filtering
- it seems that a lot of online “knowledge resources” are sorted by most recently added material
- http://www.ted.com/ - the ted page presents a series of new and featured talks with a relatively clear option to browse all talks



- here’s a biodiversity knowledge resource that has most of our desired features on the landing page

Case Study format

Learnings from other toolkits

- DIY
  - Blog-style
  - Two columns - first column focuses on specific projects, second column focuses on specific tools; but both explain how people used the DIY tools to accomplish certain objectives
  - Structure: Problem, Why/How we used the tool, results of using the tool, tips
  - Short and to the point but might be useful to have challenges or shortcomings of tool as a section
  - http://diytoolkit.org/blog/casestudies/uncovering-barriers-to-sports-for-social-inclusion/
  - Note: their tagging model is cool, because a tag brings up all relevant pieces - case studies, notes, and tools
- HCD
  - Crowdsourced case-studies
    - People sign up and publish either stories or projects
    - users can update projects as their initiatives develop
    - Stories are shorter examples of tool use - mainly background and how they used the toolkit; on the right, a panel lists linked pictures to the tools they used, which is a nice touch
- Innoweave
  - Case studies under each category (eg/ scaling; collective impact, etc)
  - Some cases are just external articles - http://www.bakersjournal.com/index.php?option=com_content&task=view&id=2180&Itemid=144
  - Some are created by innoweave - http://innoweave.ca/assets/Resources%20Library/Case%20Studies/Collective%20Impact/Diversity%20Project_Collective%20Impact%20Approach.pdf
  - In general, internal articles explain context, challenges, and importance - explains specific activities an organization did to implement the approach/tool
- EEF toolkit
  - The actual toolkit case studies are pretty basic - use, impact, evaluation, but the related projects are more comprehensive
    - http://educationendowmentfoundation.org.uk/projects/anglican-schools-partnership/
    - These projects are tagged by phase and focus area

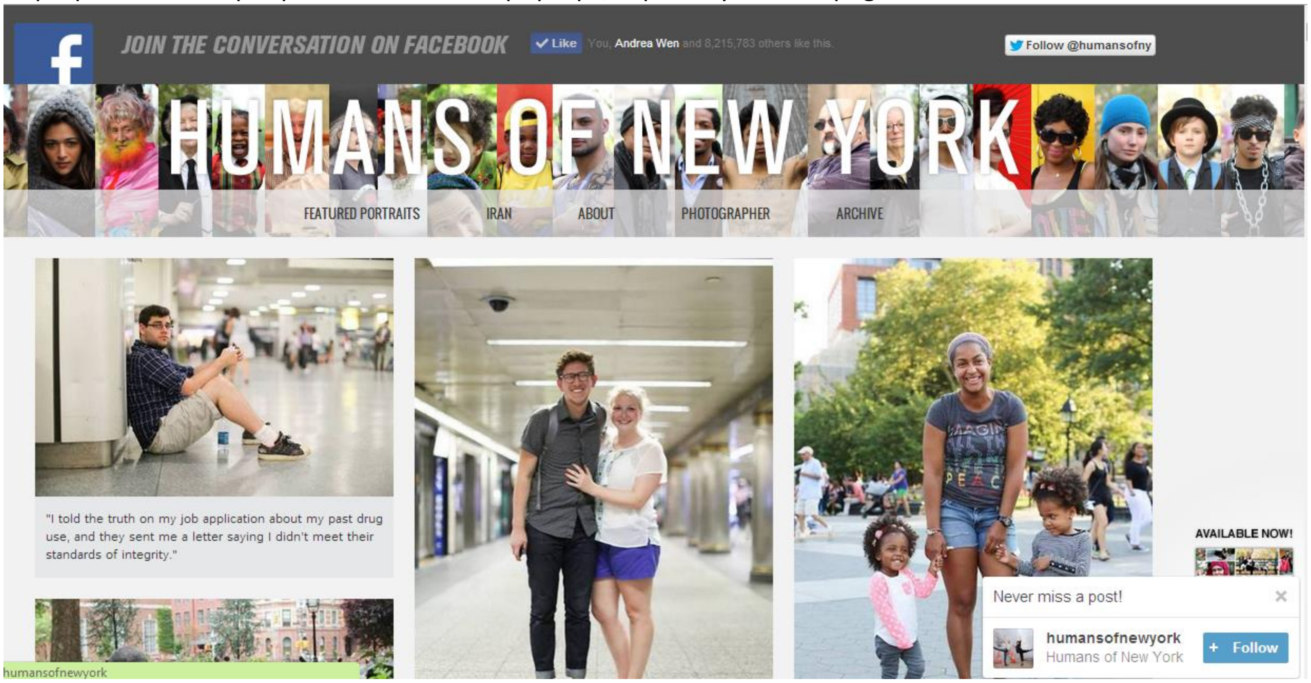
Themes from best practices research

- **Advice on format**
  - Key components:
    - TAGS - Make sure each case study is tagged within a certain category -- like industry or company size, for example -- so that when prospects come to your site, they can easily find a case study that speaks to their needs.
    - PHOTOS/PICTURES - relevant ones
    - CLEAR SUBHEADINGS - use ‘crossheads’ (subheadings) so people can skim-read the case study or ‘cut to the chase’ if they wish. Your aim should be to provide

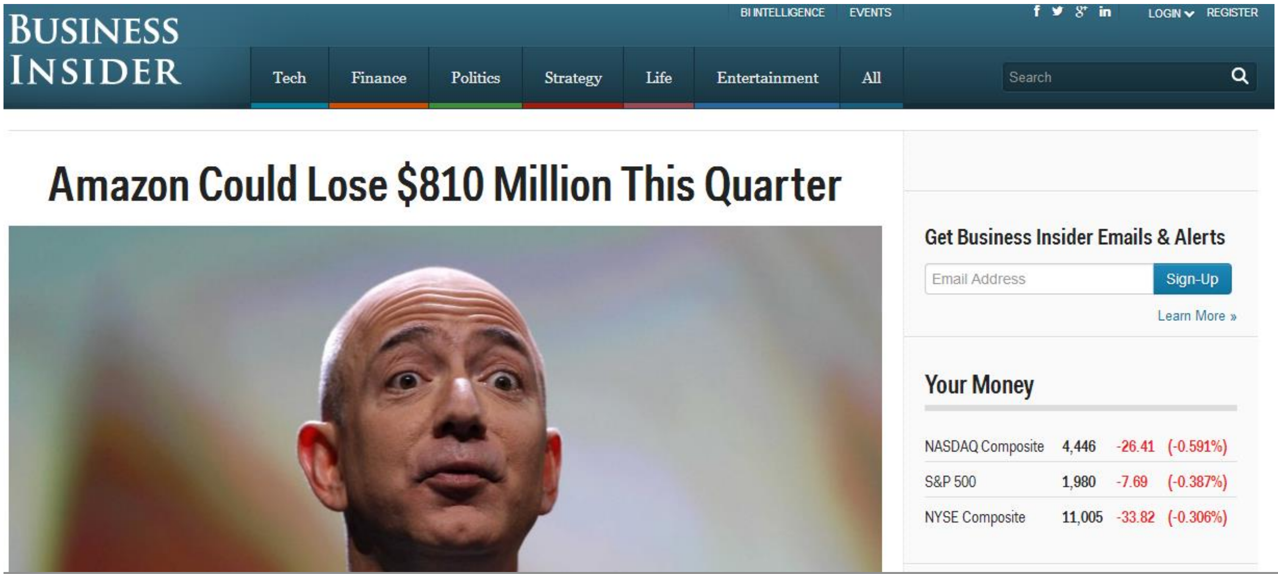
    - detail for those who want it, without obliging casual readers to plough through everything.
    - EXEC SUMMARY - A 'standfirst' (bold paragraph at the start) that sums up the whole story, including the key benefits delivered, makes for a punchy opening. Look at magazines for examples.
    - HIGHLIGHTING QUOTES - Another good tactic is 'pulling out' key content into highlighted boxes beside the text, or interspersed within it. Again, magazines will show you how.
  - Case study **content can be multi-purposed in text, image, video and document types:** web page, PDF, Word, PPT, Slideshare.
    - eg/ http://www.salesforce.com/customers/stories/philips.jsp - video, clean interface
    - http://static.googleusercontent.com/media/www.google.com/en/us/analytics/customers/pdfs/amari.pdf - good use of quotes and side panels
  - show actual, measurable results -> NEED, ACTION, RESULTS/BENEFITS format; also include CHALLENGES/TIPS
  - Examples:
    - Salesforce.com displays their case study content in short, easy to read bullet points
    - Microsoft uses the opportunity to tell an engaging story in a long format
    - Google Analytics takes a middle of the road approach, using bullets and a short story.
- **other notes**
  - Specificity (how exactly was the tool used and what exactly were the direct benefits) is important
  - Different styles: Story or q&a or problem-solution
  - Advice on length: If your case study is to be published online, you need 500 words per page absolute max; something closer to 150 is far more likely to be read. **You can always do a concise web-page version and link to a longer PDF** (designed exactly like a printed version, on A4) that people can download.
  - Working with a professional copywriter – ideally one with experience of interviewing, who can talk to your clients – is the best way to get a really effective case study.
  - **Keyword optimized case studies can serve as a direct point of entry via search to specific solutions the customer is looking for** – shortens sales cycle considerably
  - Provides a structured **problem and solution format, often including practical insights the reader can apply immediately to their own situation**
- **Sources**
  - http://www.toprankblog.com/2013/05/content-marketing-case-studies/
  - http://blog.hubspot.com/blog/tabid/6307/bid/33282/The-Ultimate-Guide-to-Creating-Compelling-Case-Studies.aspx
  - http://www.abccopywriting.com/blog/2010/01/05/case-studies-how-to-write

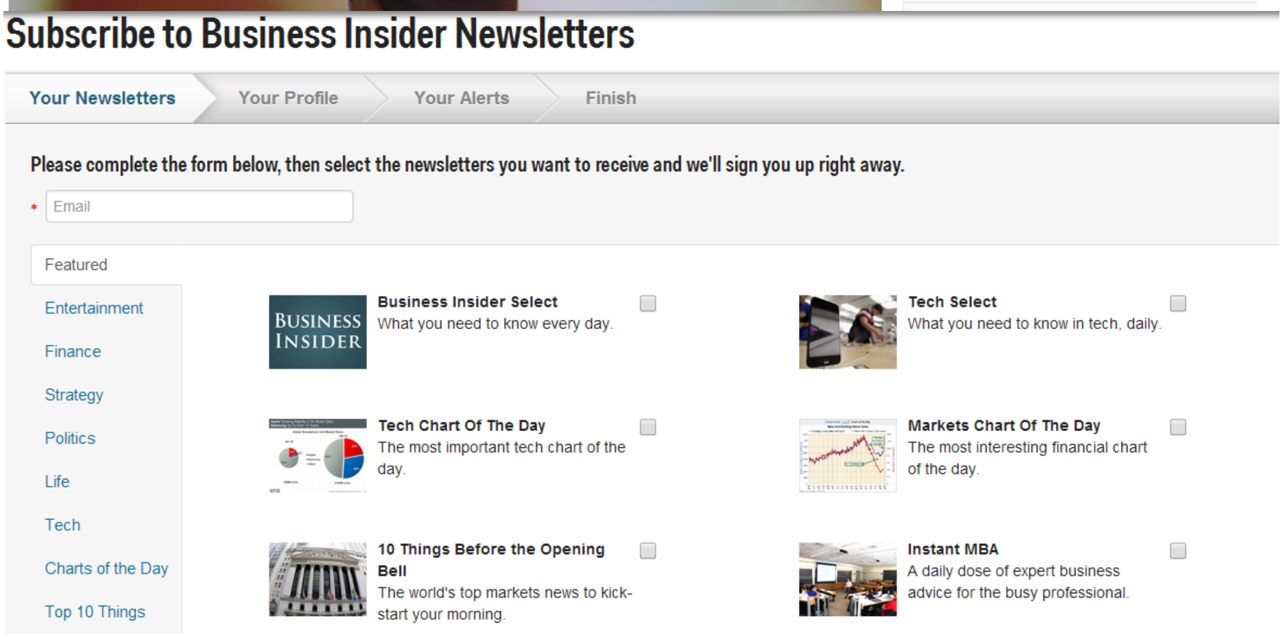
Where to place the Call to Action

Pop-up – note that people **hate** obtrusive pop-ups, especially when a page first loads



Right-side





How to design a great Call to Action:

1. **Make it stand out.** Size, color, and surrounding negative space can help focus attention on the CTA.
2. **Use a clear label.** Use a precise, active verb. "Join now" is better than "memberships."
3. **Make it look clickable.** A button with contrasting color works well.
4. **Limit the number of choices.** Many sites only need one CTA on the homepage. If more choices are necessary, pay attention to the positioning within the page. Often, placing a few calls to action in close proximity improves clarity, and helps users compare options.

Exactly where to place the button is going to depend on a number of factors, including the level of interest of the visitor and the overall design of the page.

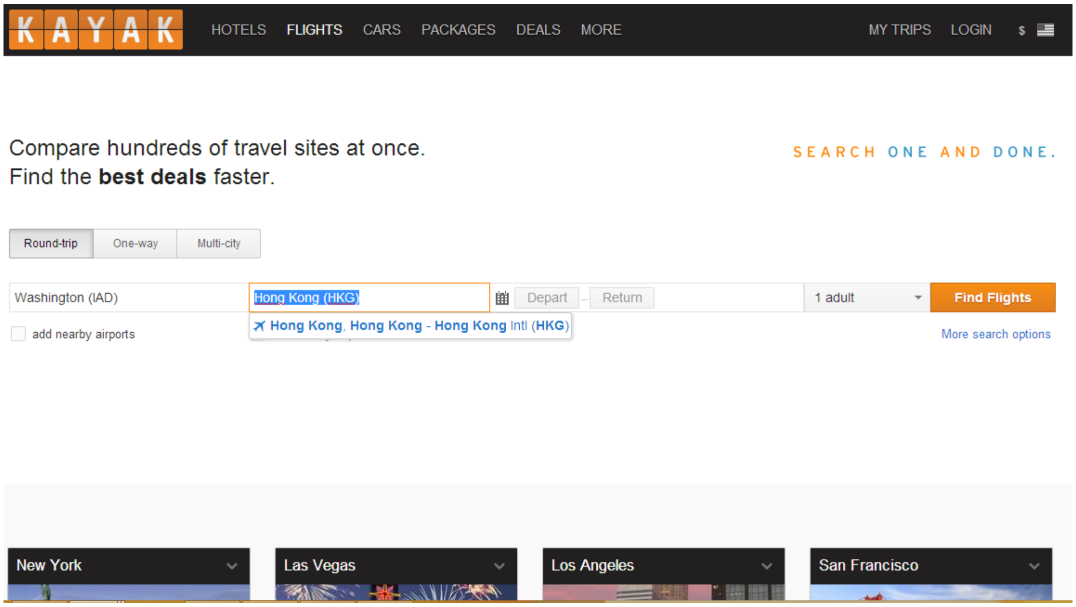
That being said, you generally want to position the button near the top of the page (and possibly repeat the action at the bottom of the page, if it's long), and make sure that it is adequately sized, has enough contrast, and enough spacing from other elements. Check out these resources for best practices and examples of good CTA buttons:

- "Call to Action Buttons: Examples and Best Practices" from Smashing Magazine
- "Call to Action Buttons" from The Landing Page Blog
- "60 Effective Examples of Call to Action Buttons" from DesignModo
- "Good Call to Action Buttons" from UXBooth

Conclusion: right-side of screen, near other action options, with color contrast and white space seems to be the verdict

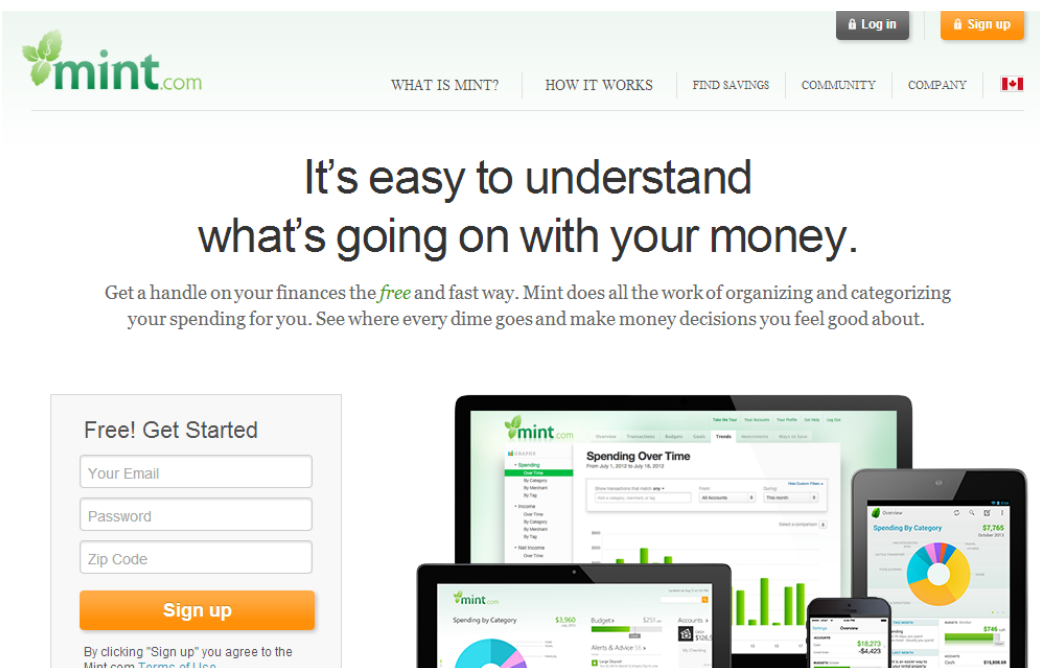
---

Corollaries from other information transaction sites



Notes: minimalist, easy-to-process tagline, simple search functionality takes front and center, featured/sample resources are an afterthought

[An interesting article on their redesign]



Engagement

A toolkit that is not used is not worth much.

You must think about your engagement and outreach strategy from the outset:

I. Create/find a database of your network – who are you going to push information and updates about the toolkit out to?
   - Identify:
     i. Key influencers (mavens – people who have large followings)
     ii. Key partners

II. Identifying your value-add to these different network members

III. Create a community engagement plan
   - A CEP outlines strategies for promoting, disseminating, and engaging users with the toolkit
     i. What are our channels for outreach?
     ii. What is our media (and social media) strategy?
     iii. Offline events?
   - **Key stages**
     i. **Buy-in** – introducing people to the idea of the toolkit, even before it's out (pre-launch)
     ii. **Dissemination** – sending out the toolkit once it's ready
     iii. **Follow-up –** ensuring continual usage of toolkit
   - Include timeline and deliverables
   - Questions to ask:
     i. Who is Involved? Target audience?
     ii. How do we get initial interest?
     iii. How do we maintain user engagement?
     iv. Where is the Toolkit going?

	Sharing Mechanisms (How will sharing work?)	**User Incentives (Why will users engage?)**	**Management (How will Toolkit manager facilitate engagement?)**
Value	Email and Share buttons (social media)	Recommend new users in order to access resources and tools on partner sites that normally aren't open-access	• Publish influential organizations' quiz results • Collect Net Promoter Score for Toolkit (with consideration for us to publish scores)
Implement	Email and Share buttons (social media)	• Track feedback loops progress (i.e. share and track Quiz results) in order to access resources and tools on partner sites that normally aren't open-access • Toolkit facilitates contact with other network members • Use of the toolkit unlocks resources on other sites	Follow-Up emails asking about follow-up actions
Contribute	Email and Share buttons (social media)	• Prominently featured as a Contributor on the Toolkit homepage • One-on-one consultation with experts	Events where ideas can be exchanged

Strategies

I. ONLINE: Structure website such that it makes promotion accessible and valuable.
   a. Pre-launch page where potential users can sign up for Launch notification
   b. Recommend users collects points for inter-operability on other sites
   c. Provide mechanisms to email and share the Toolkit (individual resources, entire library, quiz, quiz results, etc.)

II. PARTNERSHIPS: Engage Key Influencers and Network Partners who can increase validity and interest.
   a. Partners to contribute different tools, insights, methodologies
   b. Connect with Network Partners by including their resources in the Toolkit
   c. Identify Key Influencers to get their input and support before launch
   d. Coordinate messaging and outreach across all partners
   e. Engage key influencers who can both promote and use the Toolkit

III. ONGOING VALUE: Build in mechanisms to ensure evergreen or ongoing value.
   a. Follow-Up emails
   b. Updates about events, opportunities, exchanges