[Company Name]

your logo here

Case Study Worksheet   
and Template

**Version 0.0:** [Date published]

**Presented by:** [Presenter's name]

# Worksheet

Client approval: Yes No

Note whether your case study needs to be ready in time for a specific event:

Date: Event:

Your company information

|  |  |
| --- | --- |
| Branch |  |
| Address |  |
| City, state, ZIP Code |  |
| Phone number |  |
| Fax number |  |

|  |  |
| --- | --- |
| Contact name |  |
| Title |  |
| Phone number |  |
| Fax number |  |
| E-mail address |  |

|  |  |
| --- | --- |
| Solution group |  |
| Solution offering |  |
| Project name or title |  |

Customer profile

|  |  |
| --- | --- |
| Customer name |  |
| Division |  |
| Address |  |
| City, state, ZIP Code |  |
| Phone number |  |
| Fax number |  |
| Web site address |  |

|  |  |
| --- | --- |
| Industry |  |
| Number of employees |  |
| Annual revenue |  |

|  |  |
| --- | --- |
| Contact name |  |
| Title |  |
| Phone number |  |
| Fax number |  |
| E-mail address |  |

# Template

### Case Study for [Customer Name]

## Company profile

[Briefly describe your customer’s products or services. Include information about the company's history.

###### Example:

Wingtip Toys, established in 1956, is the premier supplier to toy retailers worldwide.

Revenues in 2003: $3.5 million

Estimated IT budget for 2004: $1.2 million

Wingtip Toys ceased IT development after September 11, 2001, and has not pursued any recent IT development.]

## Business situation

[Identify the problems that your customer is facing and their goals and objectives. List the strategic business or competitive reasons that caused the customer to reevaluate its current situation. Be as specific as possible, citing examples when appropriate and including supporting customer quotes.

Example: As a result of the recovery of the market, Wingtip Toys wants to procure software for improved tracking of inventory and purchasing.]

## Technical situation

[Provide a detailed evaluation of the customer's current technical situation. Identify what the customer uncovered during the evaluation of its systems, the technical challenges the customer is facing, and how the customer believes it can meet the challenges.

Example: Wingtip Toys' current environment runs on older computers that are no longer capable of handling the bandwidth necessary for servicing Wingtip Toys' worldwide customer base. Additionally, Wingtip Toys would like to allow customers to automate their orders and also would like to eliminate telephone and paper orders.]

## Solution

[Summarize your company's solution for your customer's problem. Identify how your company implemented the solution, the resources that it used, and what steps it took and why. Describe the specific technology that your company used and why. Explain the technological benefits of your company's solution.]

## Benefits

[Summarize the business benefits that your company's solution provided for your customer. Focus on the quantifiable benefits, such as the dollar amount saved in training costs, the percentage increase in productivity, or the percentage increase in sales. Note that return-on-investment figures will greatly increase the impact of the case study. Identify any new capabilities and future plans that the customer has as a result of the solution.]

## Products and services your company used

[List the products and services that your company used for the solution.

Example: For an IT solution, list the server products used for the solution.

List the client operating system used for the solution.

List other desktop, e-mail, or Internet products used by the customer.

List third-party products used for the solution.

List the services your company used, such as IT business consulting and user experience engineering.]

## Services provided by other groups or companies

[List any external companies that participated in the solution and what services they provided.]