Overall Case Study Structure

this is an example structure of a case study. It's just for reference, don't fill this out

Beginning	Middle	End	
Project Metadata	Show your work	Share your learnings	
Introduction & Summary	UX & Design Artifacts Metrics		
	Tell a Story	Testimonials	



Writing the Beginning: Project Metadata Template

This is a working template, feel free to copy and paste into another document or overwrite the right column with your own data

Metadata	Metadata Input (delete examples, replace with your own)		
Project Name	Yelp Reservations UI		
Project Tagline	Making reservations seamless for Yelp users		
Project Summary	Yelp Reservations is an app that saves time for tech savvy diners. It removes the pain of online reservations with an innovative, seamless user interface. My role was to research, design and test all UIs related to the project. I collaborated with design, product development and engineering to launch this project.		
Company/Client Name	Yelp		
Project Date or Timeframe	3/25/2016 - 5/25/2016		
Your Major Tasks & Responsibilities	Develop the UI to showcase as a demo to potential investors		
Platforms	Webapp Mobile Tablet Watch		
Tools Used	Sketch, Axure, InVision		
Key Performance Metrics	# of downloads, engagement time		
Team Members & Collaborators	UX Designer: Sarah Jane (me), Technical Lead: Dev Nishka		
Link to Flnal Project	www.insertyourfinalproject.com		



This is a working template, feel free to copy and paste into another document or use the box below to develop your project summary.

The template below is a structure for writing a high-level summary for your project. This project summary can be included in the introduction of your case study to give readers a sense of what your project is about. Think about it as your "2 sentence pitch" for your project. The following template is only a template - it is meant to be modified to *your* liking and writing style.

> PROJECT SUMMARY TEMPLATE

<u>Project Name</u> is a <u>tool/app/service/product</u> that <u>does X, Y, Z</u> for <u>customer/user segment</u>. It <u>solves this problem</u> by <u>doing X, Y, Z</u>. My role was <u>insert role</u>. I collaborated with <u>insert other people</u>.

> PROJECT SUMMARY TEMPLATE EXAMPLE

Yelp Reservations is an app that saves time for tech savvy diners. It removes the pain of online reservations with an innovative, seamless user interface. My role was to research, design and test all UIs related to the project. I collaborated with design, product develop and engineering to launch this project.

YOUR TURN... WRITE YOUR PROJECT SUMMARY BELOW

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Writing the Middle - Base Template Template

This is a working template, feel free to copy and paste into another document or use the box below to develop your middle section.

The middle - or core - of your case study involves describing the design process you underwent in the course of your project. The base writing template below is a 1-sentence formula to kick off writing about your middle section. Feel free to heavily modify it according to your personal voice & writing style.

> BASE WRITING TEMPLATE

I insert action in order to achieve result.

> BASE WRITING TEMPLATE EXAMPLE

I <u>created low fidelity wireframes</u> to <u>iterate through many design options</u>.

YOUR TURN... PRACTICE USING THE BASE TEMPLATE

Design Stage	Deliverable	l did in order to achieve
Discovery	User Testing	I <insert action=""> in order to <achieve result=""></achieve></insert>
Discovery	Competitive research	I <insert action=""> in order to <achieve result=""></achieve></insert>
Design	Wireframes	I <insert action=""> in order to <achieve result=""></achieve></insert>
Design	Prototypes	I <insert action=""> in order to <achieve result=""></achieve></insert>

Writing the Middle - Extending the Base Template with Modifiers

The **base template**, as the name implies, is intentionally simple. To modify or build upon the base template, we can choose from the following *modifiers:*

- Who
- What
- Where
- When
- Why
- How

Let's take a look at how this can be applied:

> BASE WRITING TEMPLATE EXAMPLE

I <u>created low fidelity wireframes</u> to <u>iterate through many design options</u>.

> EXTENDING THE BASE TEMPLATE WITH MODIFIERS

After distilling the research (**when**), I created low-fidelity wireframes (**what**) using Sketch and Balsamiq (**how**) to iterate through design options quickly. Working with the product manager (**who**), we used the wireframes to discuss product strategy (**why**).

WRITING EXAMPLES USING THE BASE TEMPLATE

Design Stage	Deliverable	I did in order to achieve	
Discovery	User Testing	Because design doesn't exist in a vacuum, I decided to understand our product from the customer's perspective through 5 user tests. I had users go through several tasks on UserTesting.com, and the way they struggled with the booking process was really eye-opening for me. There were simply too many steps in the process. The personal finance SaaS space is a crowded one, so I conducted research on the top 5 most relevant competitors.	
Discovery	Competitive research		
Design	Wireframes	I prefer starting out with low-fidelity wireframes (what) to think through the structure of webpages (why used Sketch and Axure to iterate through the design process (how).	
medium-fidelity prototypes we		Seeing is believing, and userflows finally "clicked" for the client after I had them play with my Axure prototype. These medium-fidelity prototypes were also used in UserTesting with 10 users to gauge between two of the major design options. The option using dropdowns won by a landslide.	

YOUR TURN... PRACTICE EXTENDING THE BASE TEMPLATE WITH MODIFIERS

Design Stage	Deliverable	I did in order to achieve
Discovery	User Testing	I <insert action=""> in order to <achieve result=""></achieve></insert>
Discovery	Competitive research	I <insert action=""> in order to <achieve result=""></achieve></insert>
Design	Wireframes	I <insert action=""> in order to <achieve result=""></achieve></insert>
Design	Prototypes	I <insert action=""> in order to <achieve result=""></achieve></insert>

Writing the Conclusion - Example Questions to Answer

This is a working template, feel free to copy and paste the questions into a separate document as a starting point

Coming up with a title...

- Use a conclusion title like "Learnings Recap, or Summary"
- Avoid "Next Steps" as a title it communicates that the project is incomplete. "Next steps" is fine as a bullet underneath the conclusion

Answer any of the following questions to build your conclusion section:

- What did you learn?
- Were there any insights from user research that surprised you?
- What was the most challenging thing about this project and how did you overcome it?
- What quantitative data can you show to measure the success of the product?
- What part of the design process did you particularly enjoy?
- Insert any last call to actions
- Insert any **testimonials**, which can be reviews from users, quote from a publication or from your team members in how they liked working with you.

The following is what an example conclusion can look like (of course with the questions in front taken out in the final case study).

LEARNINGS

- (*Question: What did you learn?*) I learned about the process of creating an iOS app and all the logistics that go into approval from the App Store. Mobile app development is both complex and fun!
- (Were there any insights from user research that surprised you?) During the user research process, I was genuinely surprised to see how many users completely ignore the hamburger menu. It was not as obvious of an affordance as our team thought, so we converted to text-based icons. This tested to be much more effective with users.
- (What was the most challenging thing about this project and how did you overcome it?) The project had many challenges, but the most difficult piece was communicating with the remote offshore development team. Thankfully we were able to get everyone on Slack, which made back-and-forth changes much more fluid.
- (Can you show how you measured the success of the product?) At the start of our project, 5% of our traffic signing up for the premium version of the mobile app. After the redesign of the mobile landing pages and calls to action, we saw conversion rates jump up to 8% a 160% increase! We also saw engagement the number of interactions, time on each screen increase.
- (Did you particularly enjoy any part of the design process?) While the whole project was a huge learning experience, I especially loved iterating on designs and testing those new designs on users. This tight feedback loop helped take ambiguity out of our designs, and it felt good to produce designs with the confidence that users would enjoy and understand it.
- (Do you have testimonials you can include?) Without Jane's blend of quick UX research and fast prototyping skills, our team wouldn't have been able to launch our app on time. We're so glad Jane was here to help lead our design efforts!

YOUR TURN... PRACTICE EXTENDING THE BASE TEMPLATE WITH MODIFIERS

Question	Example	Your Turn
What did you learn?	I learned about the process of creating an iOS app and all the logistics that go into approval from the App Store. Mobile app development is both complex and fun!	Write your response
Were there any insights from user research that surprised you?	During the user research process, I was genuinely surprised to see how many users completely ignore the hamburger menu. It was not as obvious of an affordance as our team thought, so we converted to text-based icons. This tested to be much more effective with users.	Write your response
What was the most challenging thing about this project and how did you overcome it?	The project had many challenges, but the most difficult piece was communicating with the remote offshore development team. Thankfully we were able to get everyone on Slack, which made back-and-forth changes much more fluid.	Write your response
What quantitative data can you show to measure the success of the product?	At the start of our project, 5% of our traffic signing up for the premium version of the mobile app. After the redesign of the mobile landing pages and calls to action, we saw conversion rates jump up to 8% - a 160% increase! We also saw engagement - the number of interactions, time on each screen - increase.	Write your response
What part of the design process did you particularly enjoy?	While the whole project was a huge learning experience, I especially loved iterating on designs and testing those new designs on users. This tight feedback loop helped take ambiguity out of our designs, and it felt good to produce designs with the confidence that users would enjoy and understand it.	Write your response
Insert any testimonials , which can be reviews from users, quote from a publication or from your team members in how they liked working with you.	Without Jane's blend of quick UX research and fast prototyping skills, our team wouldn't have been able to launch our app on time. We're so glad Jane was here to help lead our design efforts!	Write your response