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How to write a UX case study

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UX case studies are the foundation of an excellent UX portfolio and have a direct impact on how well you'll do in job interviews.

It's not enough to just produce deliverables. UX professionals must demonstrate their thought process and ability to articulate design decisions.

A well-written UX case study tells the story of each project *and* represents how well you can communicate not just what you did, but why you did it.

How would your UX career change if you could write UX case studies you're actually proud of? What would happen if you had a clear and powerful story to tell about each project in your UX portfolio?

You'd likely …

- Apply for more roles.
- Get more interviews.
- Make it further in the interview process.
- Be far more confident presenting your projects.
- Stand out as an effective communicator.
- Get more offers.
- Reach your next role faster

But, how exactly do you write more effective UX case studies?

Even if you don't think you're a good writer, it is possible. You just have to know what questions the recruiters and hiring managers need you to answer in the UX case studies.

They need you to share the details and your process for each project, but not have it be an essay or read like a white paper.

In this article, you will learn:

- How to structure a UX case study
- The 5 steps to write a UX case study
- How to actually tell a story of your process

At the end of the article, you'll find some examples of effective UX case studies.

But promise me that you'll read this article first. I know you're tempted to go look at example case studies and copy them. But don't forget, copying other people's UX case studies won't do you any good.

Instead, it'll likely launch you into Imposter Syndrome because you'll fall head-first into the comparison vortex. You'll get enamored with the "design" of these case studies and not actually consider the content and the story that each case study tells.

So before you jump to the UX case study examples below, do yourself a huge favor and read the steps below to structure and write your UX case studies.

Let's go! And by the way, this free resource will be tremendously helpful for you:

Featured Resource
Get a UX case study template. It's a Google Doc so you'll be able to make a copy and then start writing your own case studies.   Get the template

Why you're dead if you don't have well-written UX case studies

According to Center Centre, the job growth of UX designers is expected to rise 22% over the next 10 years. UX is a hot field, and there's a lot of competition.

This is why your UX portfolio can't simply be a curation of sexy-looking deliverables. Recruiters and hiring managers need to see your process. It's your job to articulate not just what you did, but why you did it.

Communication is a crucial skill for UX professionals. In most UX roles, you'll find yourself not just doing the actual work, but explaining it over and over as stakeholders challenge your decisions and colleagues who may not be versed in design need a bit of help understanding the process.

So ask yourself this …

If you don't have well-written UX case studies, then how can recruiters and hiring managers trust that you'll be able to communicate what you did and why you did it if they hire you?

There are two parts to being an effective communicator, your writing skills *and* ability to verbally discuss what you did. If you struggle with verbally presenting your projects, chances are it's because you did not invest time in writing about your projects first.

By literally writing out your UX case studies in a Google Doc first, you'll become much clearer on what you might say as you get further down the UX job interview process.

How you perform in the interviews is what will likely get you hired, but to get in the door for an interview, you need a solid portfolio. The quality of the writing for your case studies is one of the most important variables in the success of your portfolio.

How to structure a UX case study?

When approaching your UX portfolio and case studies, my advice is: think like a lawyer. Because how do lawyers win legal cases? With strong communication, and even stronger evidence.

The projects inside your portfolio are like evidence in a legal case. That's why you must choose the projects for your portfolio very carefully.

When you write a UX case study, there are 7 main sections that you should cover. It's important to note this structure does not mean that you will literally have a page in your PDF or section on your website for each of these. Furthermore, not all of these sections will apply for each project.

For example, if a project didn't have many constraints, don't feel like you must invent or stretch some constraints, just to include it. Use your best judgment, this structure for your UX case study is a guideline, not the gospel.

Here is a proposed way to structure and write your UX case study:

1. Overview
2. Problem statement
3. Users and audience
4. Roles and responsibilities
5. Scope and constraints
6. Process and what you did
7. Outcomes and lessons

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Get the template

5 steps to write a UX case study for your portfolio

A UX case study is not just about having something for your UX portfolio, but it also equips you for interviews and provides you with content you can also use on your resume and LinkedIn profile.

You've probably been faced with the "blank canvas" problem when writing your UX case studies in the past. Going forward, this 5 step process to writing your case studies will make the task feel much more manageable.

As you write your case studies, don't worry about length. If your case study ends up being 2,000 words in a Google Doc, it's not as though you are going to take all that text and cram it into your portfolio. That would be insane.

There will be a process of editing as you decide which bits of the story in the Google Doc are what hiring managers and recruiters want to hear about. As you take the content in your Google Doc and move it into a more visual format, you'll pair down what you wrote and come up with a more compact version of the story that you want to share in your UX portfolio.

Step 1. Give your UX case study a clear title

The big mistake that people make is not giving the project title enough detail, when a strong title can give context for the project.

As an example, imagine you worked on a user research project related to the checkout process on Home Depot's mobile app.

Consider each of these project titles:

> **Poor Title:** Home Depot

> **So-so Title:** Home Depot user research

> **Good Title:** Home Depot user research for mobile app checkout

Let's break this down … a title with just the company name, such as *"Home Depot"* tells the reader absolutely nothing about what you did. It could have been visual design or app development. But the user of your UX portfolio has no idea because the project title was not clear.

A title such as *"Home Depot User Research"* is a bit better. But it still is vague. Yes, it tells the reader that the project was about user research. But it doesn't reveal the specific area of focus within the product.

Something more specific provides a ton more clarity of your experience such as, *"Home Depot User Research For Mobile App Checkout"*.

This is the idea project title. It's much clearer, can you see the difference?

Step 2: Write an outline for your UX case study

An outline's purpose is to help you understand the big picture of your project, so you can decide how to structure your case study. It may also help you realize that the project already feels like it's too big, in which case you should consider breaking it up into multiple smaller projects so that you don't overwhelm the user of your UX portfolio.

Start your outline with the seven sections listed above (use this Google Doc template), and start filling in bullet points under each section. Don't worry about sentence structure; just write and get it out of your head. If you've been documenting your projects as you work on them, then you may have some of this already written.

Step 3: Write the details for your UX case study

Now that you have an outline and you see the big-picture story of the project, you can start filling in details.

The bulk of what you write will be for the "Process and what you did" section. This is where you'll document the steps you took during the project, just like documenting science experiments in high school.

The Process section of your UX case study should address these questions:

- **What did you do?** For example, what research method did you use?
- **Why did you do it?** For example, why did you choose that research method?
- **What was the result?** For example, did you achieve your research goals?
- **What did you learn?** Anything unique happen? What would you do differently next time?

To continue learning by example, let's refer back to our fictional example of the Home Depot project that focused on user research for the mobile app checkout.

Below are examples of content that could be for the Process section of the project. Imagine this part of the case study is meant to addresses the research step of the process.

Poor explanation of the research step:
"We did usability testing on the checkout of the Home Depot mobile app."

Why is this weak? Because it only tells the reader what you did. It doesn't address why you did it, what happened, and what you learned. It's too vague and provides no insight into what *actually* happened.

Instead, consider this more descriptive explanation of the user research step of the process:

Good explanation of the research step:
"To evaluate the new checkout on the Home Depot mobile app, we relied on usage metrics in conjunction with 8 usability tests. This allowed us to gain deeper understanding through combining both qualitative and quantitative information.

Although users were able to get through the checkout more quickly, they continued to struggle with the shipping section. Discussions with users discussion revealed that often times, products in one order have different shipping addresses, which was possible, but difficult in the current checkout."

Why is this good? This version is much stronger because it goes beyond just talking about what was done. Providing this depth is what will set you apart; articulating your design decisions and the process will help position you as a more mature and thoughtful professional.
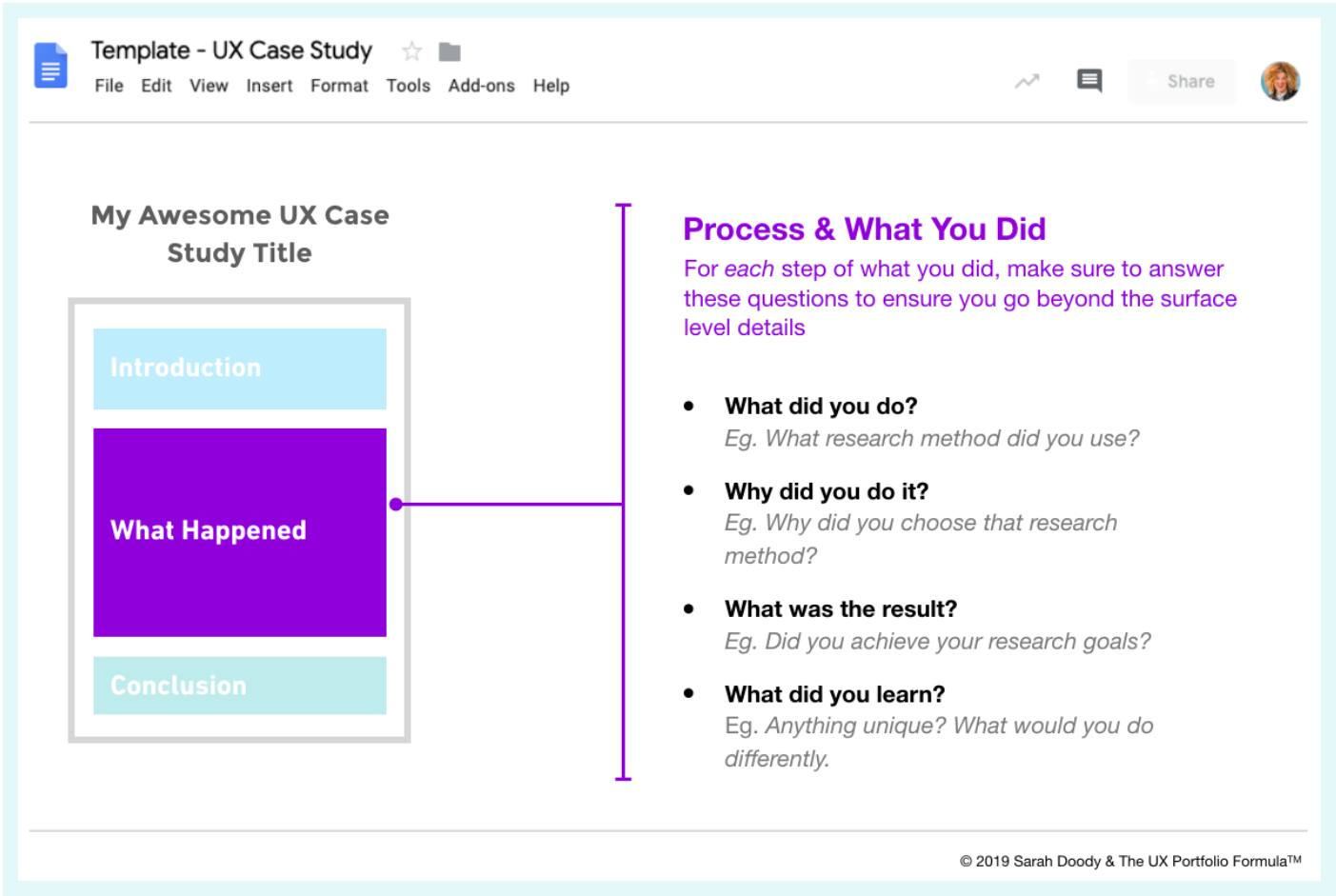
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Step 4: Write the UX case study using only headlines

At this point, you're likely freaking out and worried your UX case study is too long. You're right, it probably is. But remember, what you wrote in your Google Doc is not going to all make its way to your actual UX portfolio

Imagine that your Google Doc is a movie and now it's time to make the 60-second trailer! This next step will help you start to distill everything down so that you are focusing on the key highlights of the story in your case study.

The best way to do this is to pretend that you have to write your case study only in tweets. It sounds crazy, but it works.

For each section of the case study outline, write a single headline or sentence, except for the Process section.

For the Process section, you'll want to have a headline for each step. Continuing with our Home Depot user research example, some of the headlines for the Process section might be:

> **Step: What type of research you did and why you did it**
> *Headline:* "Analytics revealed customers struggled and sometimes abandoned, checkout at the shipping section. To understand why we conducted eight usability tests."
>
> **Step: Findings from the research**
> *Headline*: "Usability tests revealed that business customers, versus residential, had different shipping needs, which were not being addressed in the current checkout experience."
>
> **Step: Impact of research on product development**
> *Headline: "We prototyped two new versions of the checkout, allowing customers to choose shipping address on a per-product basis."*

By sticking to a tweet-length character limit, you'll force yourself to identify the most important points of the case study—which will then become headlines when you create your actual portfolio.

A good way to test whether or not you have strong headlines is to ask yourself if someone would understand the main points of your project by skimming the headlines. If not, then re-write your headlines—because if you want the users of your UX portfolio to quickly understand your project, those are the most important points.

Step 5: Distill your case study into a shorter version for your UX portfolio

Regardless of the format you choose for your portfolio, your writing needs to be clear and succinct.

It won't happen in one edit! Let's say you're working in Keynote with slides, your process will look like this:

- Take the headlines you wrote and place one headline per slide in Keynote.
- Consider that you might merge some bits of information into one slide. For example, you might combine your overview and problem statement. It's subjective, so you decide!
- Now, you need to go back and start to pull the most important and relevant details from your case study and put them on each slide, as supporting details or evidence.

Examples of UX case stories and why they are effective

To help you see what makes a good UX case study, let's break down a few good ones.

Simon Pan's Uber case study definitely has reached "viral" status … have you read it?

A quick word of caution, yes, it looks good. Simon's a visual designer. But the reason it went viral goes *way* beyond the visuals. So don't let that spin you into Imposter Syndrome.

Simon understands how to write a solid story about the problem, people, product, process, and solution.

Here's what Simon's Uber case study does well:

1. **Simon's case study clearly states the problem and frames the project.** Even if I'd never heard of Uber before, I'd have enough context to understand the project.

2. **Next, Simon explains his process. And he does so as a story.** It does not read like a white paper. It's easy to read and keeps my attention.

3. **At the end, Simon concludes the case study with some results, reflections, and insights.** People don't just want to know what you did, they want to know the impact of what you did.

4. **Simon creates a scannable and skimmable experience for the user of his case study.** Obviously, Simon is a visual designer and was able to nail the visual presentation of this.

In the video below, I do a quick 5-minute teardown of Simon's Uber case study.

UX Case Study Example: Uber App | Sarah Doody, UX Designer

▶

A well-written case study can serve you for years to come in your UX career

If you follow all these steps, you will have a long-form case study and you'll have edited it down into something that's more readable and scannable for the user of your UX portfolio.

And remember, the UX case studies you write serve many purposes. Of course, they are the foundation of your portfolio, but they also can feed into:

- Bullet points for your resume and LinkedIn problem
- What you include in cover letters
- How you present a project in a UX job interview
- Articles you publish in the future
- Talks you may give at local UX meetups

Learning to write effective UX case studies will also equip you with crucial written communication skills. This will help you in your day to day role as a UX professional as you not only do the work but also educate others and advocate for UX.

Your Action Steps For Writing Your UX Case Study

1. Get the Google Doc template for a UX case study
2. Give your project a clear and succinct title
3. Write your UX case study outline
4. Fill in the details of the "Process & What You Did" section
5. Write the case study using the headlines-only approach
6. Distill your case study into a more visual format of your choice

And if you want more help with your UX case studies, portfolio, or job search, then consider enrolling in The UX Portfolio Formula.

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