DrupalCamp Atlanta

How to take the stress out of writing case studies

Thursday, September 9, 2021

David Minton | @DH_David
@DesignHammer

Overview

- Introduction
- Who, When, Where?
- What?
- How?
- Conclusion

designHAMMER

Introduction

Measure twice, cut once…

David Minton

Managing Partner

@DH_David

Over twenty years industry experience

Who am I?

- Managing Partner at DesignHammer
- Head business development and sales
- Writing case studies over 20 years
- Member of Drupal Community over 10 years

Learning Objectives

- Take the stress out of producing case studies
- How to use case study process for QA

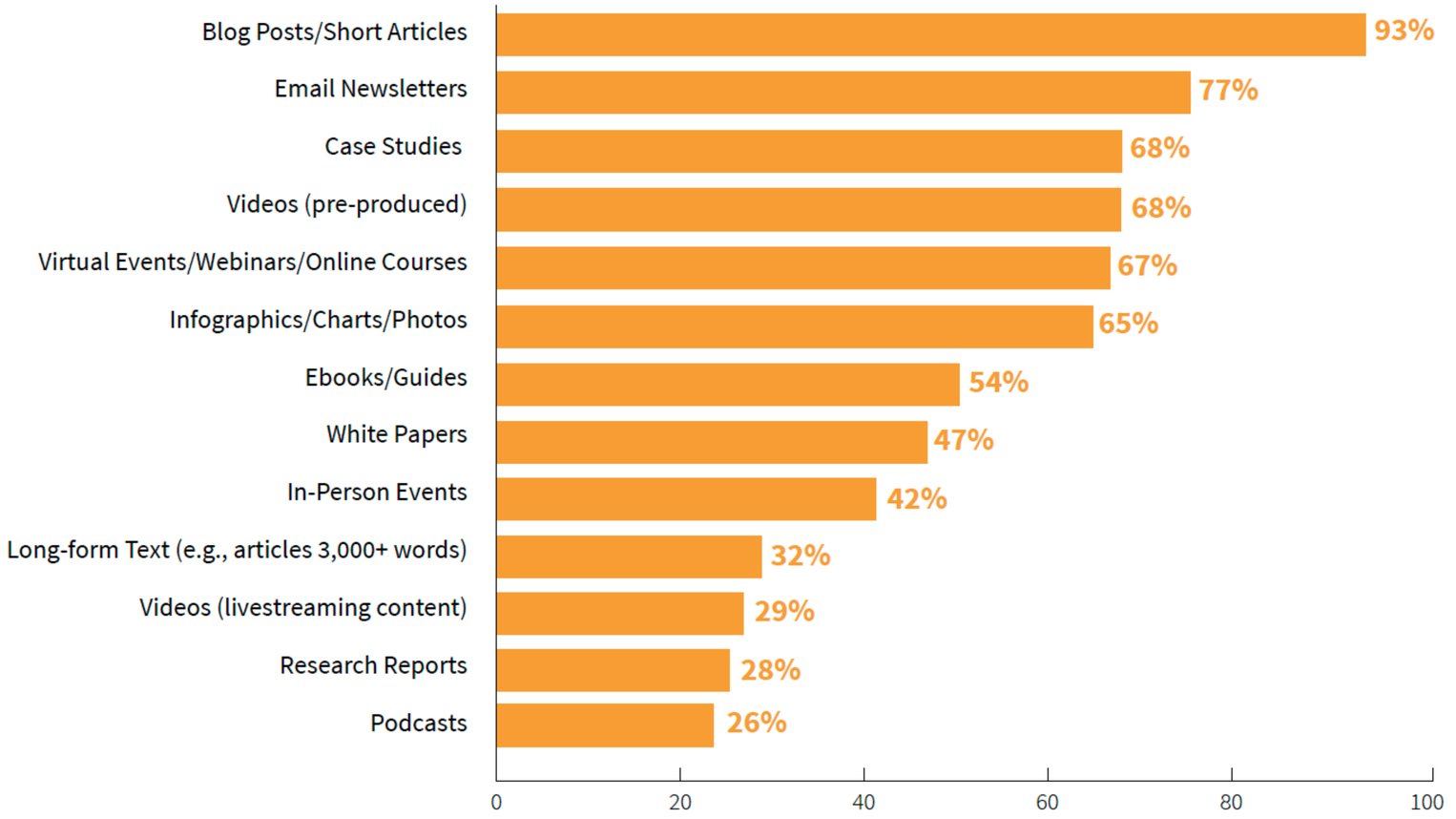
Assumptions

- Marketing case studies (mostly)
- Custom software projects (e.g. Drupal)
- B2B projects

Why bother with Case Studies?

Who, When, Where?

Content Types B2B Marketers Used in Last 12 Months



Base: B2B content marketers. Aided list; multiple responses permitted.
11th Annual Content Marketing Survey: Content Marketing Institute/MarketingProfs, July 2020

Of all the content types they use, B2B marketers said **blog posts/ short articles** and **virtual events/ webinars/online courses** (both tied at 22%) produced the best overall content marketing results for their organization in the last 12 months.

Other content types used in last 12 months: Digital Magazines (16%); Print Magazines (11%); Print Books (5%); and Other (5%).

We asked respondents which content types are the highest performing for their organization for building brand awareness, securing leads, nurturing leads, and converting leads. Their top 3 responses in each category are shown here.

TO BUILD BRAND AWARENESS	TO SECURE LEADS	TO NURTURE LEADS	TO CONVERT LEADS
Blog Posts/Short Articles (31%)	In-Person Events (19%)	Email Newsletters (31%)	In-Person Events (25%)
Social Media Content (e.g., tweets, stories) (25%)	Webinars/Online Events (16%)	Blog Posts/Short Articles (13%)	Case Studies (23%)
In-Person Events (8%)	Ebooks/Guides (13%)	In-Person Events & Case Studies (tied at 9%)	Webinars/Online Events (11%)

Base: B2B content marketers whose organization used more than one content type for content marketing purposes in the last 12 months.
2020 B2B Content Marketing Benchmarks, North America: Content Marketing Institute/MarketingProfs

"Everyone loves stories. They are easy to remember…and evoke emotions in one's audience.…Reports on emotional marketing say that emotional content can improve marketing efficacy by 70%."

— *How to create social proof through case studies*
business.com

Where to use case studies?

- Company website
- Event collateral
- Nurture campaigns
- Proposals
- d.o

Know your audience

- Motivation
- Technical understanding
- Attention span

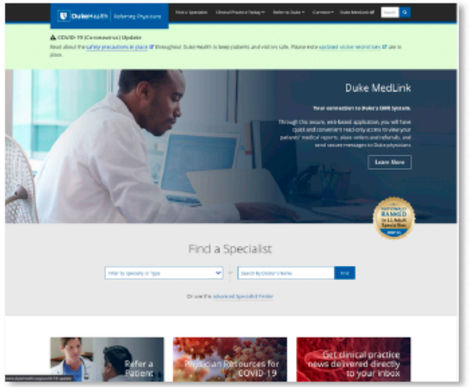
Attention span?

- Proposal: ~200 words
- Website: ~600 words
- d.o: ~1,200 words

Proposals

DUKE HEALTH: REFERRING PHYSICIANS

URL: physicians.dukehealth.org



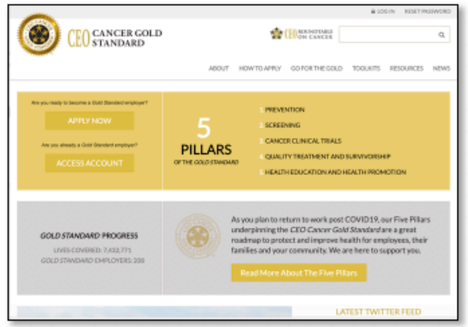
Physician engagement is an important aspect of Duke Health's mission. Previously Duke Health had worked with external vendors to deliver the Clinical Practice Today website and newsletter to physicians. Based upon interviews with physicians, Duke Health identified the desire of the physician audience to have a physician-centric website portal.

DesignHammer worked with Duke Health to design and develop the new website. During Discovery & planning, DesignHammer undertook user testing to define an intuitive navigational system.
DesignHammer also conducted a targeted competitive analysis of physician portals from other premier medical systems to ensure that the Duke Health Physicians website would be best in breed.

In addition to presenting a centralized platform to Continuing Medical Education (CME) and Duke Health thought leadership, the website also provided a specialist finder interface to help connect Primary Care Physicians with Duke Specialists. The specialist finder leveraged the existing physician data used for the Doctor Finder on dukehealth.org, allowing both sites to be driven by a single data source.

The website also met DHTS technical requirements including preferred version of Drupal, integration with DHTS user authentication system, and accessibility compliance based on Duke Web Accessibility standards.

NCER GOLD STANDARD



Cancer is
cancer
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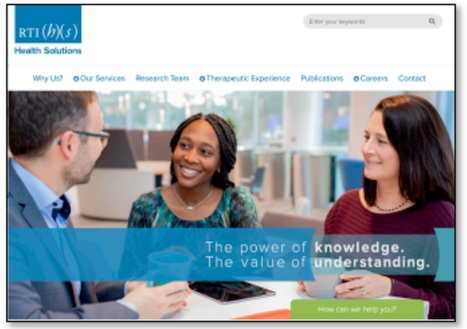
anti-cancer
no-cost
that
ve a healthier workplace by focusing on cancer risk reduction,
d high-quality care.

able on Cancer to redesign the Cancer Gold Standard website
ter present relevant resources to employers at each stage of
worked with CEO Roundtable on Cancer to understand how
accreditations versus re-accreditations and for domestic versus
hat accommodated all cases.

ificantly reduced staff time spent supporting employers
completing the accreditations and re-accreditations using the improved workflows.



-Health
cal
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search,
research
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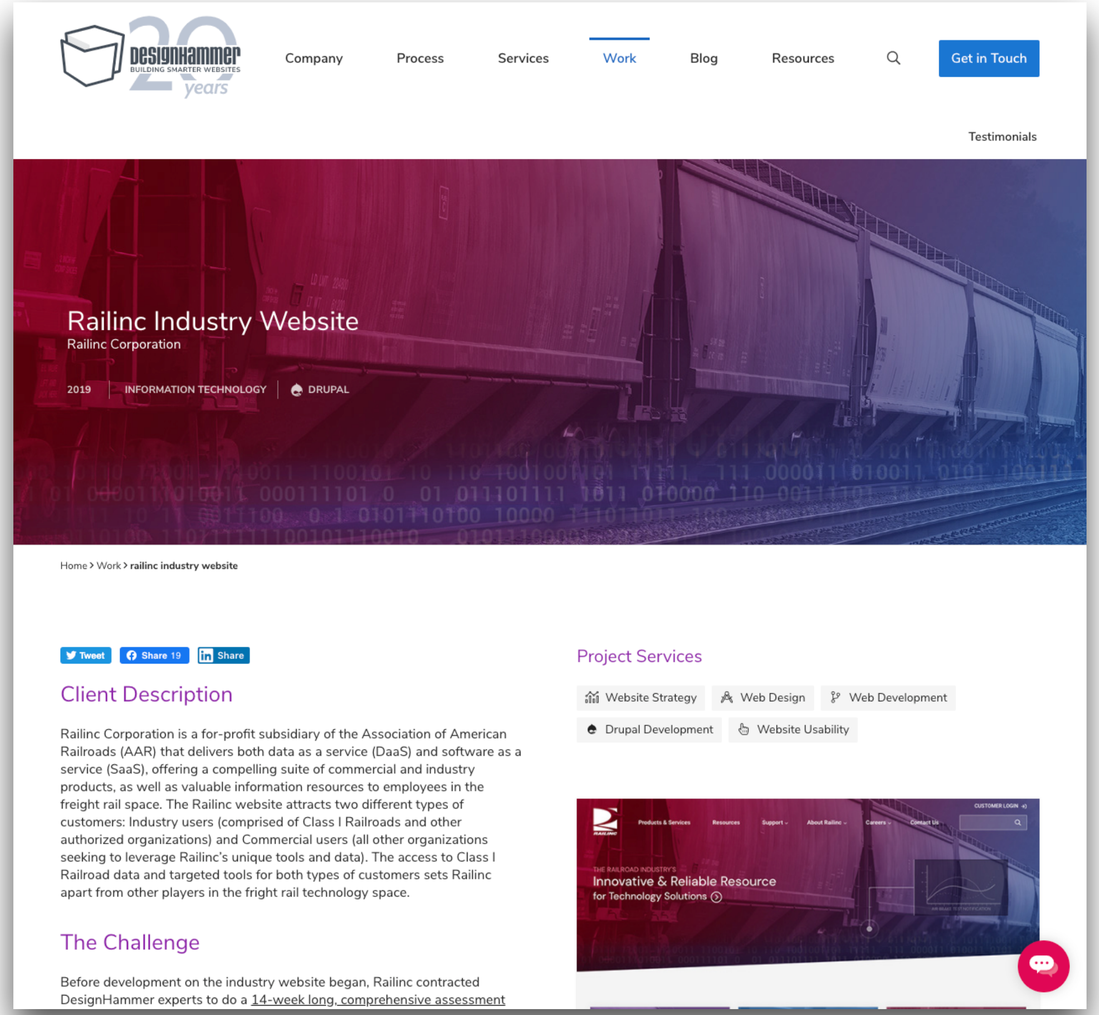
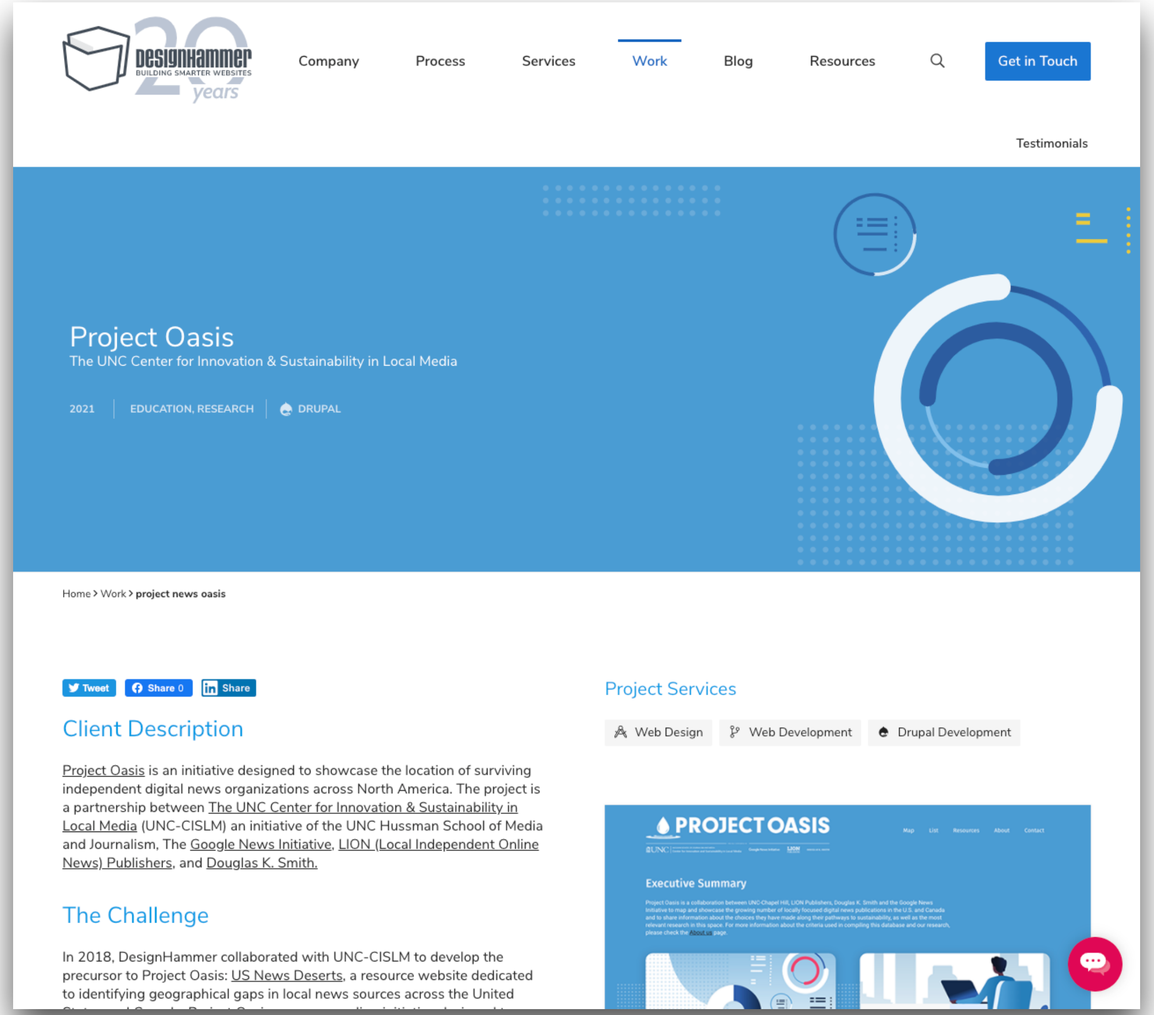
the RTI-HS website using Drupal. We set up functionality to
tom in-house staff and publications database to populate
is custom data import functionality allows RTI-HT to maintain
elationships between Services, Therapeutic Experiences,
es further studies and staff changes, all without RTI-HS content
ebsite for these changes.

Website


Company
Process
Services
Work
Blog
Resources
Get in Touch
Testimonials
Railinc Industry Website
Railinc Corporation
2019
INFORMATION TECHNOLOGY
DRUPAL
Home > Work > railinc industry website
Tweet
Share 19
Share
Client Description
Railinc Corporation is a for-profit subsidiary of the Association of American Railroads (AAR) that delivers both data as a service (DaaS) and software as a service (SaaS), offering a compelling suite of commercial and industry products, as well as valuable information resources to employees in the freight rail space. The Railinc website attracts two different types of customers: Industry users (comprised of Class I Railroads and other authorized organizations) and Commercial users (all other organizations seeking to leverage Railinc's unique tools and data). The access to Class I Railroad data and targeted tools for both types of customers sets Railinc apart from other players in the fright rail technology space.
The Challenge
Before development on the industry website began, Railinc contracted DesignHammer experts to do a 14-week long, comprehensive assessment
Project Services
Website Strategy
Web Design
Web Development
Drupal Development
Website Usability
Innovative & Reliable Resource
for Technology Solutions


Company
Process
Services
Work
Blog
Resources
Get in Touch
Testimonials
Project Oasis
The UNC Center for Innovation & Sustainability in Local Media
2021
EDUCATION, RESEARCH
DRUPAL
Home > Work > project news oasis
Tweet
Share 0
Share
Client Description
Project Oasis is an initiative designed to showcase the location of surviving independent digital news organizations across North America. The project is a partnership between The UNC Center for Innovation & Sustainability in Local Media (UNC-CISLM) an initiative of the UNC Hussman School of Media and Journalism, The Google News Initiative, LION (Local Independent Online News) Publishers, and Douglas K. Smith.
The Challenge
In 2018, DesignHammer collaborated with UNC-CISLM to develop the precursor to Project Oasis: US News Deserts, a resource website dedicated to identifying geographical gaps in local news sources across the United
Project Services
Web Design
Web Development
Drupal Development
PROJECT OASIS
Executive Summary

Power up #1

Harness the power of community

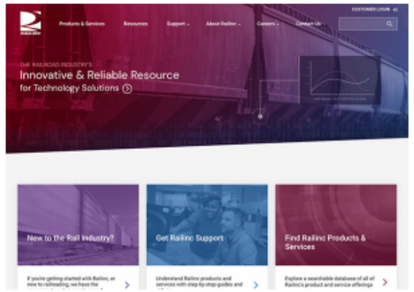
Why Drupal? Build Solutions Services Community Resources Give Events Try Drupal

Drupal™

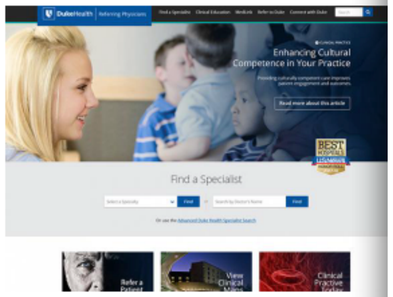
Case studies from DesignHammer

◀ Back to DesignHammer

Using Drupal 9 to cultivate digital “oases” in the local news landscape

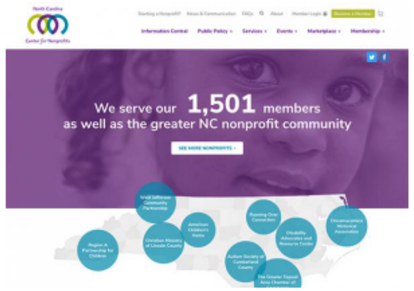


Leveraging Migrate Plus to Automate a Complex Custom Content Migration for Railinc’s Drupal 8 Website



Leveraging Search API Solr for Duke Health Referring Physician Website

Implementing Multi-Step Application Process for Cancer Gold Standard



Achieving Better Nonprofit Workflows with Salesforce Suite

Custom ePublishing System for UNC School of Government

Why Drupal? Build Solutions Services Community Resources Give Events Try Drupal

Drupal™

Marketplace

Services | Hosting | Supporting Technologies | Training | Books | Partner Programs

DesignHammer

✔ This organization is a Drupal services provider.

designHAMMER

http://www.designhammer.com

15 people on Drupal.org

Services
3rd party Integration, Accessibility, Consulting, Data migration, Deployment, Design, Development, E-commerce, Front-end Development, Information architecture, Mobile Site Development, Performance Tuning and Optimization, SEO, Site Audits, Site Building, Support, Theming, Upgrades, Usability

Sectors
Arts, Banking and Financial, Community, E-Commerce, Education, Enterprise, Entertainment, Government, Non-profit, Publishing, Small business, Social Networking, Sports, Startups, Technology

Offices in
United States

Locations served
United States

Organization type
Drupal service provider

Headquarters
Durham, NC

Usual project budget
$25,000–$100,000

Drupal Association Organization Member

DesignHammer specializes in graphic design, online application development, SEO, usability, and hosting. The firm services clients in the Triangle, as well as around the United States.

Process
Every project is different, so we rely on a documented, repeatable process for structuring development; we begin by asking questions. Only after carefully considering the responses do we draw on our years of practical industry experience, and technical expertise, to plan and execute solutions that will bring quantifiable results.

Services
We feature an in-house team of dedicated Drupal developers and designers who offer the following services:

- Drupal development
- Custom theme creation
- Custom module development
- Modification to existing modules
- Drupal Salesforce integration
- iPhone app integration
- Legacy installation patching and upgrades
- Hosting and support
- Developer and administrator training

Recent Drupal Project Recognition

- **Railinc (Industry website)**
  - The Communicator Awards: *Award of Excellence*
  - The Communicator Awards: *Award of Distinction*
  - dotCOMM Awards: *Honorable Mention*
  - Vega Digital Awards: *Centauri Award*
  - Vega Digital Awards: *Arcturus Award*
- **Duke Health Referring Physicians**
  - W3 Awards: *Gold Award*
  - The Davey Awards: *Silver Award*
  - dotCOMM Awards: *Honorable Mention*
- **NC Center for Nonprofits**
  - dotCOMM Awards: *Gold Award*
  - The Davey Awards: *Silver Award*
  - The Communicator Awards: *Award of Distinction*
  - Summit Creative Award: *Finalist Award*
  - Hermes Creative Awards: *Honorable Mention*

Select Drupal projects

- CEO Roundtable on Cancer
- CEO Roundtable on Cancer: The CEO Cancer Gold Standard
- National Institute of Statistical Sciences
- NetOne
- North Carolina Center for Nonprofits
- North Carolina Crimes Online
- North Carolina High School Athletic Association
- Project Data Sphere
- Railinc (Industry website)
- RTI Health Solutions

Drupal contributions

Drupal Module Development and Support

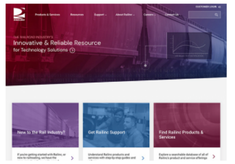
- **Salesforce Suite:** provides an interface to create fieldmaps between Drupal nodes and Salesforce objects. We co-maintain and actively contribute to the Salesforce Suite.
- **Salesforce Feeds:** provides integration between the Salesforce API module and Feeds, along with its predecessor FeedsAPI. We developed and continue to maintain the Salesforce Feeds module.

Drupal Cons and Camps

- Florida Drupalcamp 2021: sponsor, presenter
- Drupal GovCon 2020: sponsor
- Drupal Camp Asheville 2020: sponsor, presenter
- Drupal GovCon 2019: sponsor, presenter
- Drupal Camp Asheville 2019: sponsor
- Charlotte Drupal Drive-in 2019: sponsor
- Drupal GovCon 2018: sponsor, presenter
- Drupal Camp Asheville 2018: sponsor
- DrupalCon 2018 Nashville: sponsor
- Drupal GovCon 2017: sponsor
- DrupalCon 2017 Baltimore: sponsor
- Drupal GovCon 2016: sponsor, presenter
- DrupalCon 2016 New Orleans: sponsor
- Drupalcamp Atlanta 2015: sponsor, presenter

Case studies

Using Drupal 9 to cultivate digital “oases” in the local news landscape



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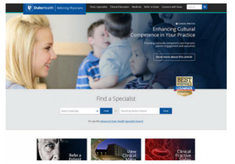

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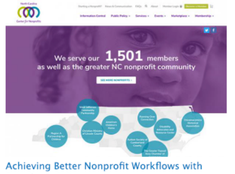


Achieving Better Nonprofit Workflows with Salesforce Suite

View all case studies

designHAMMER

Why Drupal? Build Solutions Services Community Resources Give Events Try Drupal

Drupal™

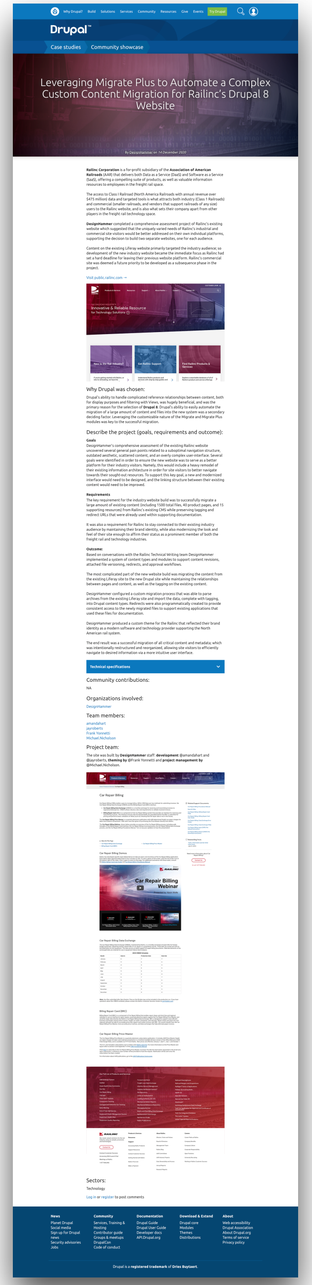
Case studies Community showcase

Leveraging Migrate Plus to Automate a Complex Custom Content Migration for Railinc's Drupal 8 Website

By DesignHammer on *14 December 2020*

Railinc Corporation is a for-profit subsidiary of the **Association of American Railroads** (AAR) that delivers both Data as a Service (DaaS) and Software as a Service (SaaS), offering a compelling suite of products, as well as valuable information resources to employees in the freight rail space.

The access to Class I Railroad (North America Railroads with annual revenue over $475 million) data and targeted tools is what attracts both industry (Class 1 Railroads)



Technical specifications

Drupal version: Drupal 8.x

Key modules/theme/distribution used:
Migrate
Migrate Plus
Migrate Tools
Migrate API
Workflow
Content moderation
Media Library
Paragraphs
Configuration Split

Why these modules/theme/distribution were chosen:
Drupal 8 Core
Drupal Core was the best choice for this project because it allowed DesignHammer developers to customize and choose the appropriate contrib modules as needed, rather than starting with a set of modules that were not an effective match for meeting the new website requirements.

Migrate, Migrate Plus, Migrate Files, Migrate Tools
These modules provided the underlying API and extensions used to facilitate the migration of content and files from Liferay JSON source data into Drupal entities. DesignHammer built out seven custom migrations that covered the blog, documents, media files and images, keywords/tags, and redirects. Custom source plugins were written to handle reading and processing JSON-formatted tables from a variety of provided data files. Custom process plugins were written to check for the existence of a remote file before attempting to migrate it, for converting file URLs within body content from old paths to new Drupal paths, as well as checking for existing nodes, media entities, and redirects.

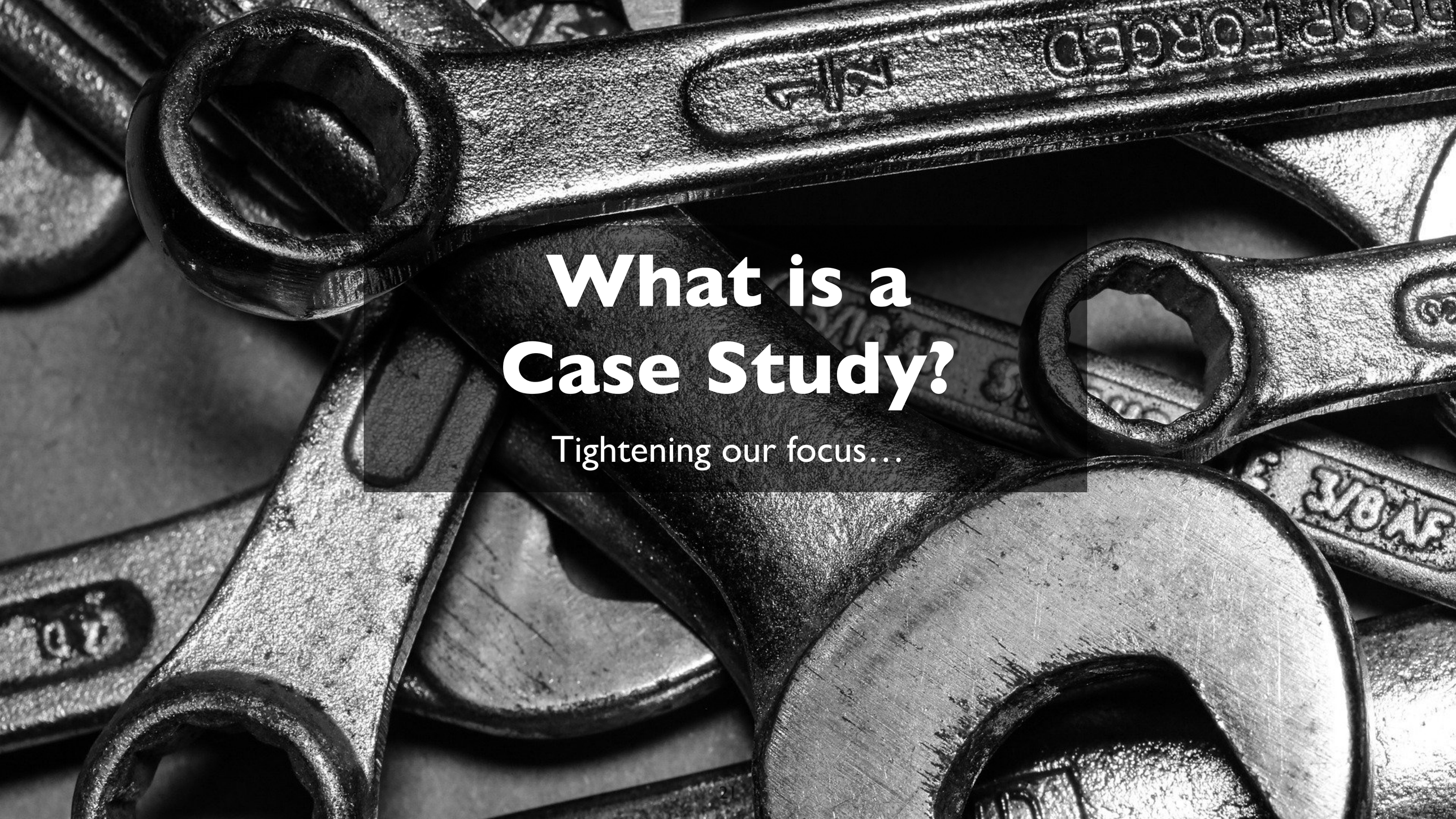
Additionally, the Drush commands provided by Migrate Tools made the migration process easy and repeatable across multiple developer environments. Any team member working on this project could follow clear instructions to run the migrations on their machine without issue.

Workflows, Content Moderation
The content team at Railinc needed a workflow that would allow content editors to create new drafts for existing content (and brand new content), and then allow for a review process to refine those revisions before final publishing by a content administrator. These core modules made it easy to define this process and tweak as needed.

Media, Media Library
Railinc's documents are a combination of files, images, and remote videos. Drupal's Media Module was used to create 3 custom media types to handle both the initial importing during the migration process as well as to make it easier for content editors to update and add new document content. Media's provided widgets make it easy to choose from existing files that have already been uploaded, which cuts down on accidental duplication.

Paragraphs
Most of the content types on the site include customizable call-to-action blocks that are unique on a node-by-node basis. Rather than duplicate these fields required across multiple content types, the Paragraphs module was used. This allowed the fields to be created once and grouped together for each type of call-to-action. The paragraph was then added to the content type as needed. Paragraphs also made it easy to create section content, which could be used an unlimited number of times per node. By using Paragraphs to group these fields together, it was easy to add a new section and be certain all of the required fields would be added for each (rather than relying on one large text area field and HTML customizations).

Config Split
Railinc uses their test environment for many different testing purposes, and as such the configuration files diverge from what is configured on the production environment. Config Split has been used to account for any per-environment differences so that Drush's config-import and config-export can be safely used in any environment without fear of accidentally deleting in-progress changes to items such as webforms, blocks, and menus.



What is a Case Study?

Tightening our focus…

“In marketing, case studies are used as social proof — to provide buyers with the context to determine whether they’re making a good choice. A marketing case study aims to persuade that a process, product, or service can solve a problem.”

— *unknown*

What is not a case study?

- Screen capture of home page
- Summary of work performed

Minimum components

- The Problem
- The Solution
- The Results

Recommended Additions

- Marketing savvy Title
- Client Overview (if relevant)
- Visuals
- Quotes (External and/or Internal)
- Call to action

When to release?

- Coincide with completion of project?
- Short time after completion?
- Once results are collected?

Types of Results

- Objective vs. Subjective
- Internal vs. External Analytics
- Immediate vs. Over Time
- Technical vs. Business Case

Not “Results”

- New website
- Attractive website

~$3 billion estimated value

$626.5 billion market cap

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Omaha, NE 68131
Official Home Page

- A Message from Warren E. Buffett
- Annual & Interim Reports
  Updated May 1, 2021
- Link to SEC Filings
- Special Letters from Warren & Charlie RE:Past, Present and Future
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- Warren Buffett's Letters to Berkshire Shareholders
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designHAMMER
BUILDING SMARTER WEBSITES

statcounter
GlobalStats

Press Releases FAQ About Feedback

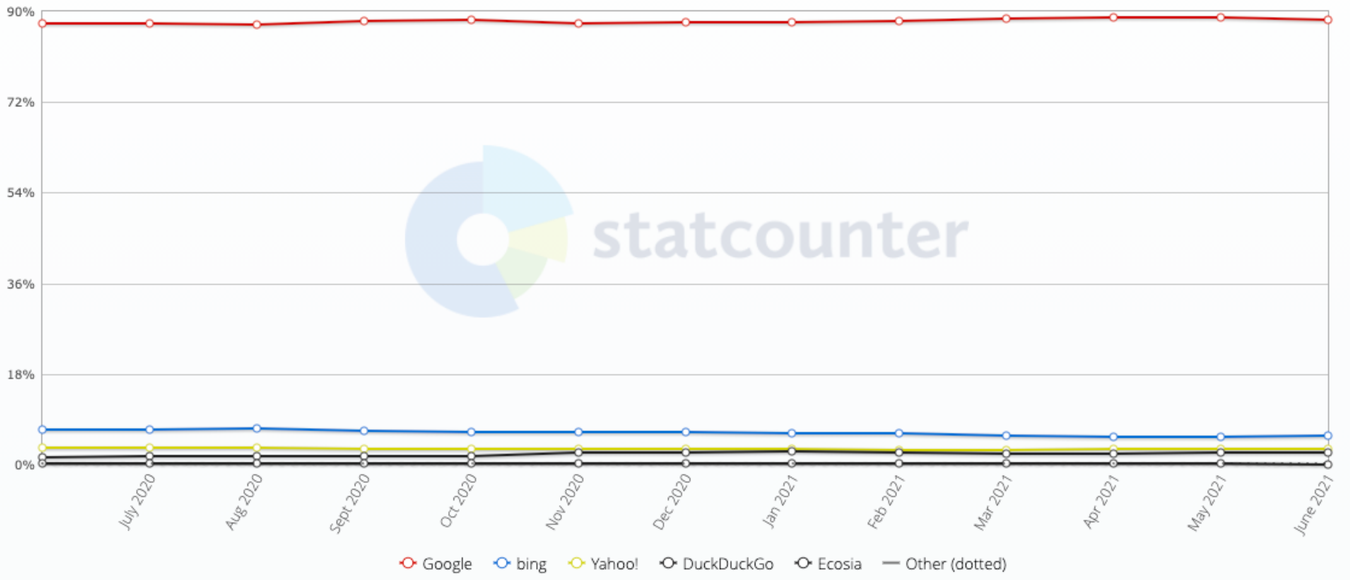
Google	bing	Yahoo!	DuckDuckGo	Baidu	Ecosia
88.44%	5.68%	3%	2.42%	0.12%	0.11%

Search Engine Market Share in United States Of America - June 2021

Search Engine Market Share United States Of America

June 2020 - June 2021

Edit Chart Data



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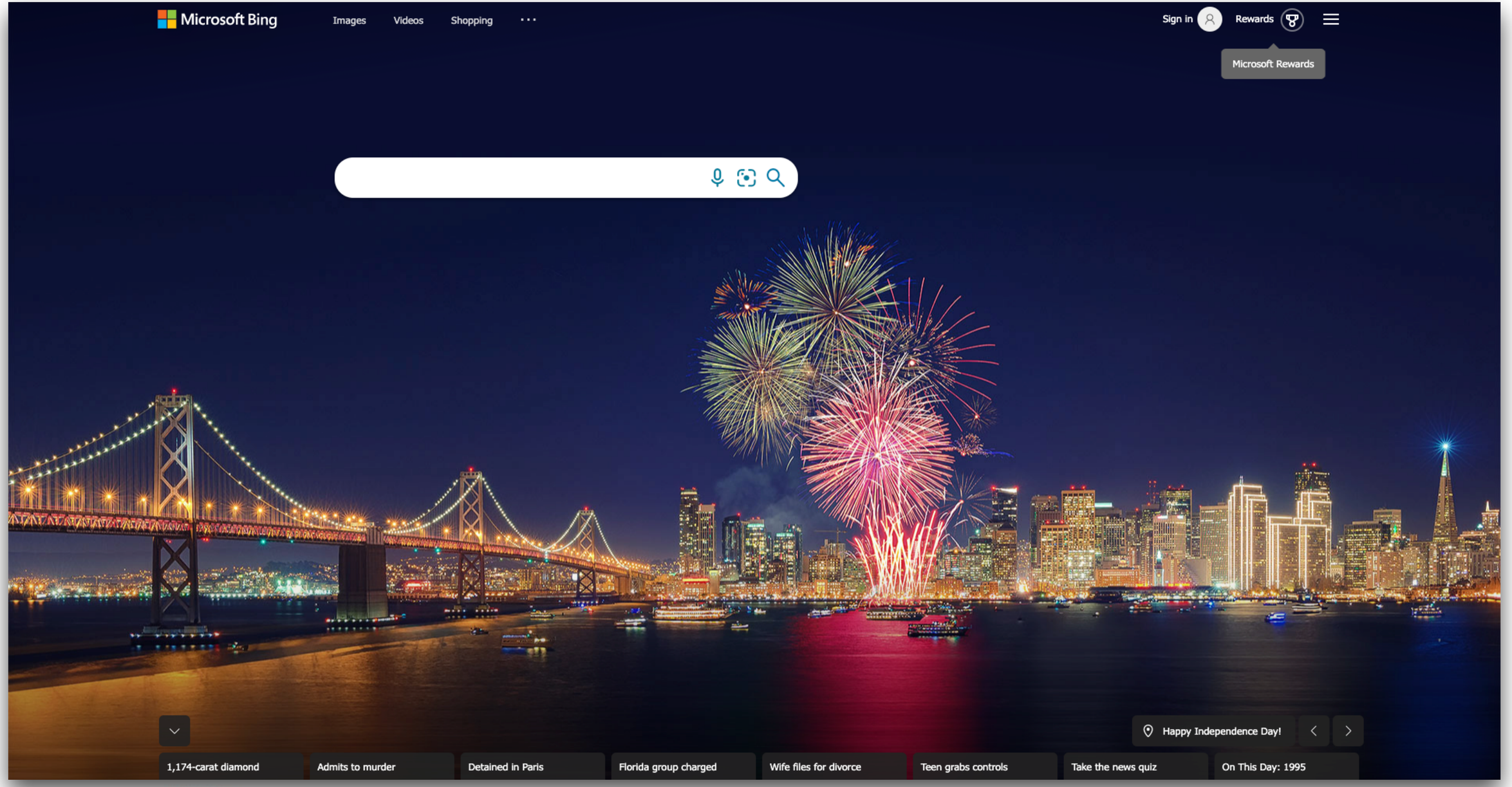
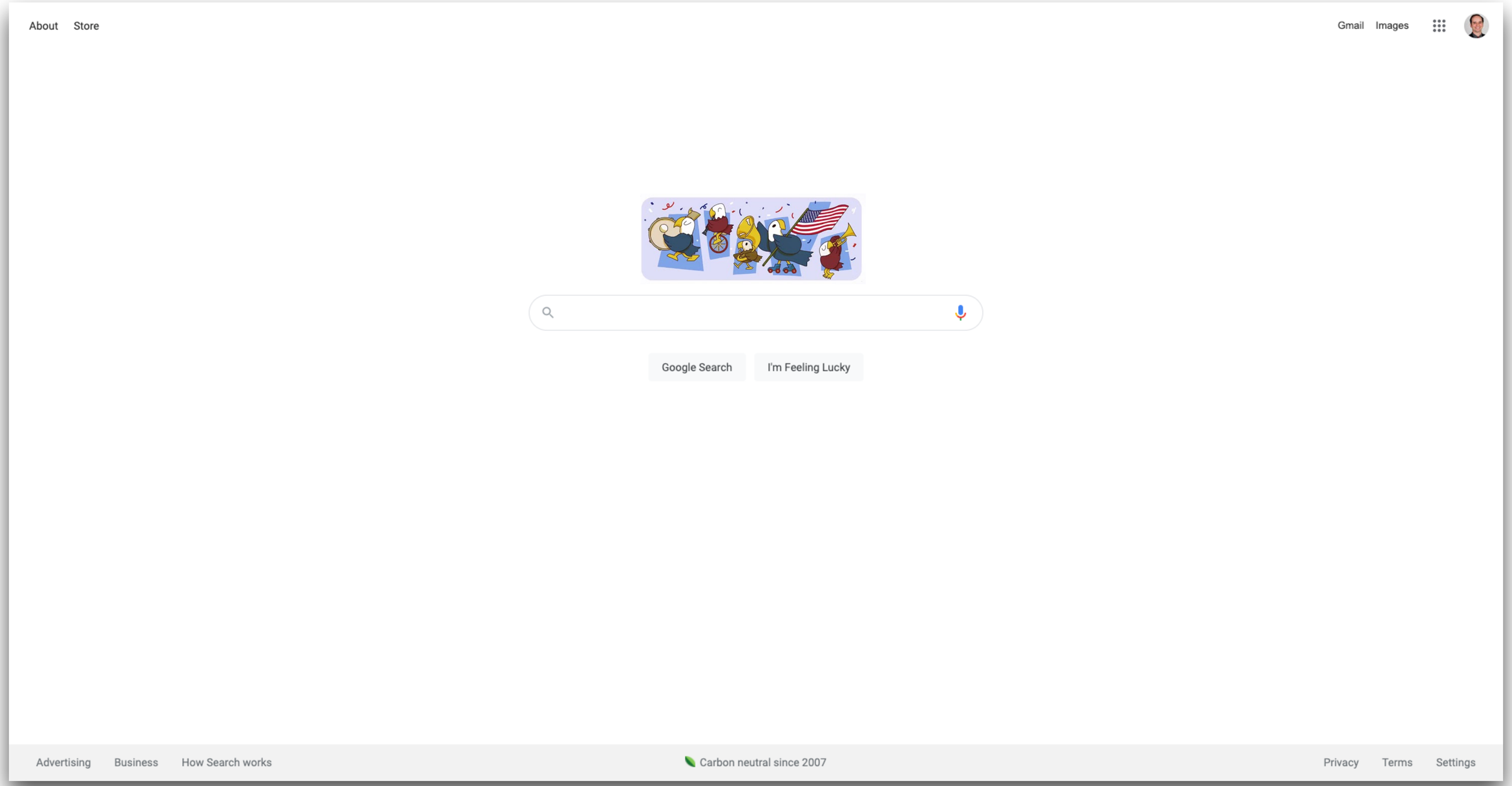

Microsoft Bing
Images
Videos
Shopping
Sign in
Rewards
Microsoft Rewards
Happy Independence Day!
1,174-carat diamond
Admits to murder
Detained in Paris
Florida group charged
Wife files for divorce
Teen grabs controls
Take the news quiz
On This Day: 1995


About
Store
Gmail
Images
Google Search
I'm Feeling Lucky
Advertising
Business
How Search works
Carbon neutral since 2007
Privacy
Terms
Settings

How we do it

Time for the secret sauce…

When to start?

- Whenever you get around to it?
- Soon after the project is complete?
- At the end of the project?
- In the middle of the project?
- At the start of the project?

Usual complaints

- Too much effort
- No time to do it
- Competes with paying work

When to start?

- During Discovery & Planning
- Everything needed except actual results should be known

Too much effort?

- Case study draft serves as Executive Summary for Specification

No time to do it?

- Part of the Specification
- Include in project estimate

Power up #2

Who is paying for all of this?

Competes with paying work?

- Case study is part of Specification
- Case Study is QA step
- Charge clients for the work!

Our process

- Perform Discovery & Planning
- Draft Specification
- Biz Dev/Marketing determine “sales angle”
- PM meets with Content Writer 15–30 mins.

Case Study draft meeting

- Who is the client?
- What are their goals?
- What are their challenges?
- What is the overview of our solution?
- What are the desired results?
- When will initial results be determined?

"**How is this part of QA?** If the project manager can't explain the project at a high level after conducting **Planning & Discovery**, and drafting the **Specification**, the project is off the rails. The project manager then has to explain to me why they can't answer these questions."

— David Minton
DesignHammer

Caveats

- Challenge for pure Agile projects
- Sometimes the client doesn't provide everything we need to do the project right.
- May need to push back on client or eject
- Plans may change either during Specification review, or during the project
- The "Executive Summary" version needs some editing to be a marketing case study

Power up #3

Get it in writing!

Include draft Case Study in spec

- Client approves the case study included in Specification (before you start coding)
- Possible it gets removed for legal review, etc.

Big win all around

- Reduces chance of internal/external miscommunication on project goals/results
- Case study completed with minimal effort
- Case study completed with the project
- Client pays for the case study

Power up #4

Case studies are a force multiplier…

Repurpose case studies

- Write blog posts about case studies
- Post case studies to social media
- Include case studies in newsletters
- Present case studies at conferences

Power up #5

Learn from failure as well as success

"Case studies of failure should be made a part of the vocabulary of every engineer so that he or she can recall or recite them when something in a new design or design process is suggestive of what went wrong in the case study."

– Henry Petroski, Ph.D.
specialist in failure analysis

Case for case studies of failure

- Valuable lessons from failure
- Document institutional knowledge
- Keep them internal (of course)
- For small organizations debrief may suffice
- Formal case studies of failures for enterprise

Conclusion

Let’s tie it all together

Why start at the beginning?

- Ready when you need it
- Higher quality with less effort
- Provides an additional QA step to process

Take aways

- Case studies are a valuable marketing tool
- Both positive and negative case studies have value
- Write case studies at the beginning not the end

Special thanks

David Minton

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