

Case Study – Information Gathering Form

Use this form to gather information for your case study, such as your client's background, partners involved in the project, and technical aspects of the technologies deployed in the solution. Once you have this information at your disposal, you are in a much stronger position to begin your case study.

When completing the form, try to be as concise as possible and ensure that all contributors, e.g. customer/partner, have agreed to be mentioned before starting this template.

Case Study Details			
Author's Name			
Organisation			
Key Contact			
Telephone Number		E-Mail	
Client's Details			
Client's name			
Contact name			
Telephone Number		E-Mail	
Strategic Partners	<input type="checkbox"/> Name of Partner <input type="checkbox"/> Name of Partner <input type="checkbox"/> Name of Partner		
Customer Details In this section, provide a brief description of the customer, such as years in business, nature of work, employment figures, awards, flagship products.			
Customer's main problem Describe the customer's situation and issues, for example, their three main challenges.			

Actions you took		
Outline your recommendations and steps you took to help the customer.		
Resources required		
List the products, skills, and training you needed to complete this project.		
Business Tools Applied		
EFQM Excellence Model	(Check Box)	<input type="checkbox"/>
Balanced Scorecard		<input type="checkbox"/>
ISO 9000		<input type="checkbox"/>
Other 1		<input type="checkbox"/>
Other 2		<input type="checkbox"/>
Other 3		<input type="checkbox"/>
Key Issues Covered		
1. Enter keyword	3.	5.
2.	4.	6.
<p>This section summarises the key issues of your case study. Choose approx. six keywords to describe the issues covered. These may include some of the following:</p> <p>Service Activities</p> <p>Initiative: E.g. change management</p> <p>E-Government</p> <p>Performance measures</p> <p>Better Quality Services</p>		

Abstract of Case Study

Provide a brief overview of the case study and include:

General description of project aims

Summary of approach adopted and methodologies used

Key results

Lesson learned

Organisational Overview

In this section, provide a brief overview of the client's organisation including its:

Organisational structure

Industry sector (products/services)

Number of staff, budgets etc

Pressures for Change

Outline the drivers behind this project, such as:

Customer pressure

Budget pressures

Changes in Government legislation

Approaches

This area could include:

Adoption of QA tools

Software Development methodologies or frameworks

Involvement of managers/staff or customers

Solution

<p>Solution description</p> <p>Describe the solution you implemented including how its impacts users, improvements over previous systems etc</p>	
<p>Number of users</p>	
<p>Type of solution (for IT solutions, check relevant boxes)</p>	<input type="checkbox"/> Business Intelligence <input type="checkbox"/> Content Management <input type="checkbox"/> Customer Relationship <input type="checkbox"/> Database <input type="checkbox"/> Desktop productivity <input type="checkbox"/> eCommerce <input type="checkbox"/> ERP <input type="checkbox"/> Infrastructure Management <input type="checkbox"/> Intranet <input type="checkbox"/> Messaging <input type="checkbox"/> Mobility <input type="checkbox"/> Networking <input type="checkbox"/> Process Management <input type="checkbox"/> Retail <input type="checkbox"/> Security
<p>Products deployed check relevant boxes</p>	<input type="checkbox"/> Java <input type="checkbox"/> SAP <input type="checkbox"/> Microsoft .NET <input type="checkbox"/> Linux <input type="checkbox"/> Siebel <input type="checkbox"/> Others as appropriate

Achievements & Benefits

This may include:

Changes in the systems, policies, operations

Improvement in quality, value, customer service etc

External recognition, awards, endorsements

Lessons Learned

This may include:

Approach to change, improvement, quality, service

Role of staff

Acknowledgement of setbacks and situations to avoid

Next Steps

Outline the next steps to be taken, e.g.:

How improvement will be maintained

Training requirements

New initiatives that stemmed from this project

Other Comments

Finally, include other points worth mentioning, such as:

Distinctive features that make your case study unique

External recognition

Quotes from recognized authorities or industry figures