



NEW ORLEANS
DRUPALCON 2016



NEW ORLEANS
DRUPALCON 2016

Spotlight on the Featured Showcase: Writing Great Case Studies for Drupal.org

leighc



NEW ORLEANS
DRUPALCON 2016

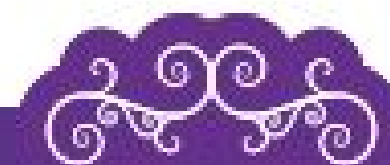
Drupal.org Track



Today we will learn...

Your roadmap for this session

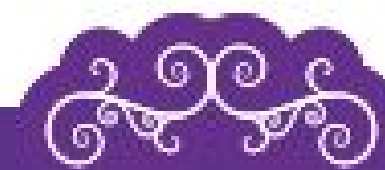
- Who is leighc
- Quick definitions
- Why case studies are important to you and to Drupal
- What the Featured Showcase is and why it's valuable
- The review and promotion process
 - Short detour: common problems or blockers
- Writing beyond the guidelines
- How to get involved
- Questions



Introductions

Why I am 100% trustworthy

- Leigh Carver (leighc)
- Drupal Association since early 2014
- Highly caffeinated content writer
- Trained in Drupal-fu by tvn
 - (I'm her #1 fan)
- Case studies and community spotlights
- Also other unrelated stuff





Time for definitions!





NEW ORLEANS

DRUPALCON 2016

case study

Noun

1.

a process or record of research in which detailed consideration is given to the development of a particular person, group, or situation over a period of time

2.

a particular instance of something used or analyzed in order to illustrate a thesis or principle



NEW ORLEANS

DRUPALCON 2016

1. a record of research in which detailed consideration is given to the development of a Drupal website over a period of time



NEW ORLEANS
DRUPALCON 2016

2. a particular instance of something used in order to illustrate the value of the Drupal CMS

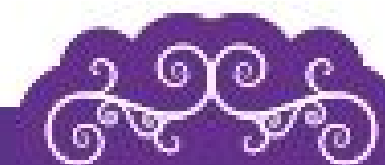


What we talk about when we talk about case studies

You can find them on [Drupal.org/case-studies](https://drupal.org/case-studies)

- Site name
- Screenshot
- URL
- Why Drupal was chosen
- Describe the project (goals, requirements and outcome)
- Key modules/theme/distribution used
- Why these modules/theme/distribution were chosen
- Community contributions
- Team members

A screenshot of the Drupal Case Studies page. The page has a blue header with the Drupal logo and navigation links: Get Started, Community, Documentation, Support, Download & Extend, Jobs, Marketplace, About. Below the header is a search bar and a navigation menu with links for View Profile, Dashboard, Site Admin, and Logout. The main content area is titled "Drupal Case Studies" and has two tabs: "Featured showcase" (selected) and "Community showcase". The featured showcase displays a case study for the "City of Chicago, Office of the City Clerk Website" with a screenshot of the website on a laptop and a mobile phone. To the right of the featured showcase is a green button that says "Add your case study". Below this is a section for "Case Study guidelines" with a link to "Free Drupal training this April 8 - 9. Find a location near you." and a banner for "Drupal Global Training Days". At the bottom right, there is a section for "Drupal Version" showing "Drupal 8.x (2)".





Got it? Cool.



We'll be coming back to both of those points later.





NEW ORLEANS
DRUPALCON 2016

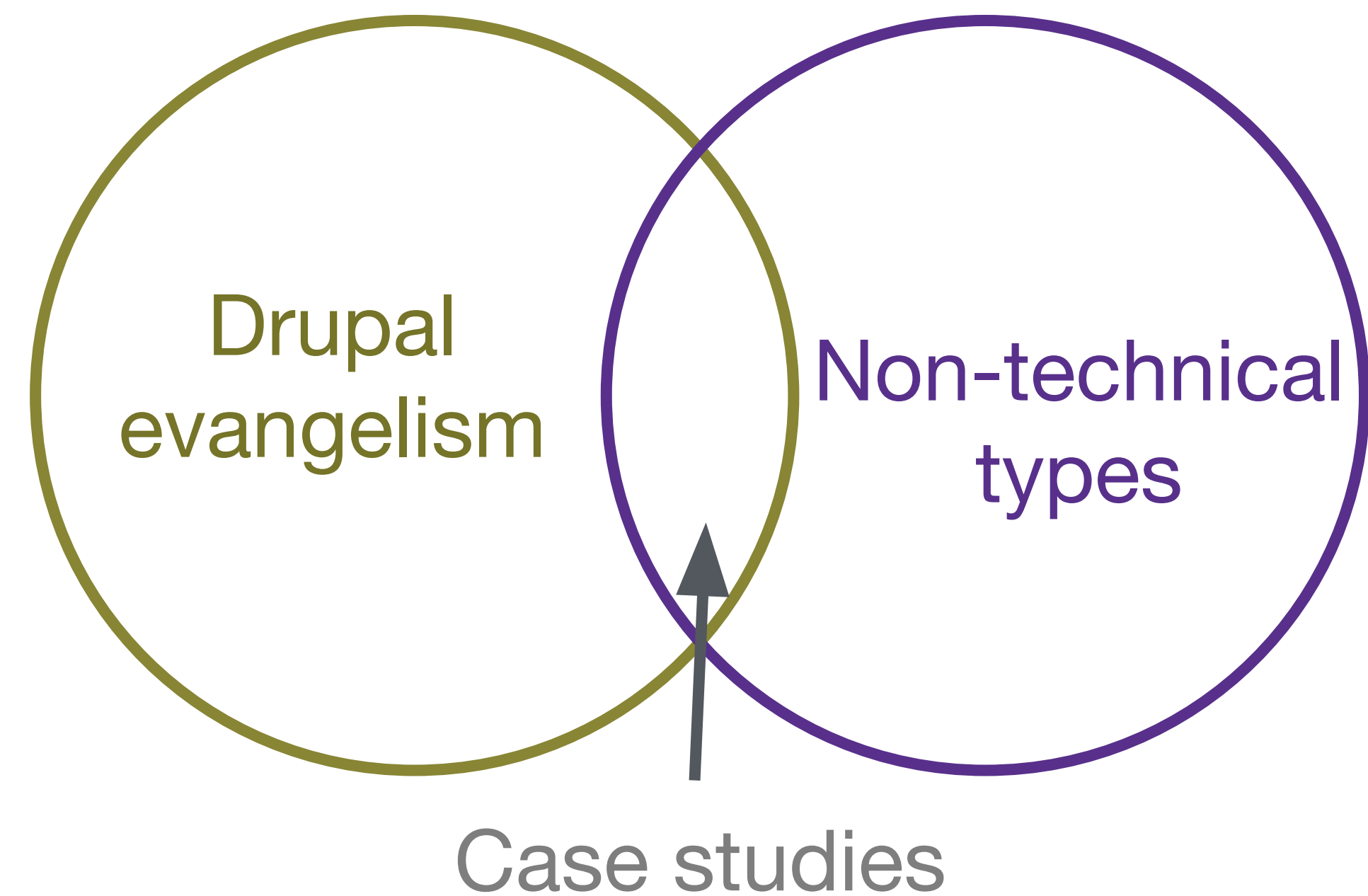
The value of case studies:

Case studies are good for your company **and** good for Drupal

Case studies open Drupal to a wider audience

Good for your business, good for Drupal

- Understandable content for non-technical types
- Exhibit power, versatility, security of Drupal
- Demonstrate flexibility of solutions and value of Drupal specialists
- Another tool in our marketing kit

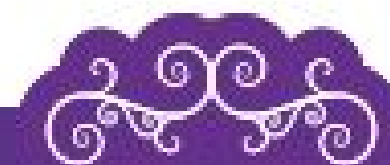




Case studies help organizations showcase what they do best

Good for your business, good for Drupal

- Get those bragging rights!
- Showing, not telling, your team's abilities
- Showing, not telling, how great Drupal is
- Showing, not telling, that your Drupal websites work for, not against, your clients.





Featured case studies help organizations get noticed

Good for your business, good for Drupal

- Featured case studies point back to your site from the front page of Drupal.org
- Tap the Drupal community's (and my) editorial and marketing expertise at no cost to yourself
- Formal association on Drupal.org between your client and your organization





Case studies help Drupal get noticed

Good for your business, good for Drupal

- They showcase....
 - Flexibility
 - Scalability
 - Security
 - Customizability
 - Big companies use it
 - Little sites use it
 - It makes pretty sites
 - Drupal as a content repository
 - Drupal as an app framework
 - Drupal as support for a video platform
 - Drupal as a public good
 - Drupal as an ecommerce platform
 - Drupal for banks
 - Mini-deployments

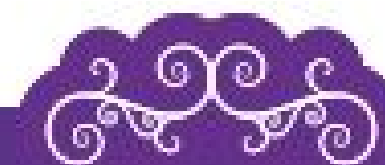
.....I COULD GO ON

And you can find examples of all of these points in the Featured section!



Case studies are good for your business and good for Drupal.

What's not to love?





Ok. But what about this
"Featured Showcase" thing?





https://www.drupal.org

Find Drupal service providers

Find a company to help you create a great website or host one.

[Browse Drupal Services Marketplace →](#)

Drupal Jobs

Find your next job or post an open position on the official Drupal community job board.

[Search or post Drupal Jobs →](#)

Thank you Drupal supporters

These companies joined our Drupal Supporter Programs to help grow the Drupal ecosystem.

[Find out who supports Drupal →](#)

Who Uses Drupal



The Telegraph Travel Guides App



Intelligent Life web and app development



EIT Avionics



- The first thing people see when they look for case studies
- The most innovative and beautiful Drupal websites
- Showcasing Drupal as a scalable solution for sites both big and small

https://www.drupal.org/case-studies

Drupal

View Profile Dashboard Site Admin Logout

Drupal Case Studies

Featured showcase Community showcase

Pad 13:53 90%

< Guides The Telegraph

Burma

Gill Charlton
Our Expert

19:52 pm
27°C, Partly Cloudy

All 73
Beach 4
Do 22
Eat 14
Shop 15

Hidden Gems
Chindwin River Expedition A journey into the heart of Old Burma, to towns and villages reachable only by riverboat.

Mandalay Do £££

The Telegraph Travel Guides App 1 2 3 4





It's where all the cool kids hang out.

Getting into the club isn't hard, but it isn't easy, either. Here's what the process looks like.





Step 1: Someone makes a case study and puts it on Drupal.org

The more thorough (and grammatically correct), the better!

Include pictures. Lots of pictures. Reading is hard.

The screenshot shows a web browser window with the URL <https://www.drupal.org/node/add/casestudy>. The page features the Drupal logo and a search bar. Below the navigation menu, the heading "Create Case study" is displayed. A light blue informational box contains the following text: "Refer to the [Case study guidelines](#) for info on how to write a case study, [Drupal.org Style Guide](#) for formatting and editorial tips. Field-by-field guidance is provided above or below each section of this form. **Project name field:** Use only the title of the site/project you are writing about. Do not use your company name or words "case study," "success story," and the like. Maximum length - 40 characters." Below this, the form includes a "Project name" text field, a "Primary screenshot" section with a "Choose File" button, a "No file chosen" status, and an "Upload" button. Further instructions state: "Use the homepage unless you can provide a strong case not to. Preferred format: PNG. No drop shadow or whitespace on the edges. Files must be less than 50 MB. Allowed file types: png jpg jpeg. Images must be exactly 620x440 pixels." A "Sectors" dropdown menu is shown with options: "- None -", "Agriculture", "Arts", and "Banking and Financial". Below the dropdown, it says "List related sector(s)".

By default, it goes directly into the Community Showcase.





Step 2: The author files an issue

- Include the name of the case study
- Include the link to the case study
- Tell us why you think you should be promoted
- Mark the issue as "Needs Review" straight out of the gate.

Promote DC.Gov

[View](#) [Edit](#) [Revisions](#)

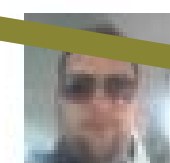
Please Promote DC.Gov Case Study (<https://www.drupal.org/node/2376465>) to the Featured Community section of Drupal.org.

This project has taken many years to complete and included migrating over 100 agency sites into the Drupal platform before the content could be accessed and displayed by the new responsive DC.Gov portal.

Feedback and comments are welcome.

[Upload new files](#)

Comments



[dddave](#) Credit *commented about a year ago*

#1

Status: [Active](#) » [Needs review](#)

[delete](#) [edit](#) [unpublish](#) [report as spam](#)





Step 3: There's a LOT of back and forth


Promote Greenpeace Greenwire case study to Featured	Closed (fixed)	Normal	Task	Case studies	12	1 year 5 months	1 year 6 months
Promote Edúkame case study to Featured	Closed (fixed)	Normal	Task	Case studies	25	1 year 6 months	1 year 7 months
Delete Hidden Case Studies	Closed (fixed)	Normal	Task	Case studies	17	1 year 7 months	3 years 2 months
Delete https://www.drupal.org/node/2318045	Closed (fixed)	Normal	Task	Case studies	2	1 year 7 months	1 year 7 months
Promote The BMJ - thebmj.com to Featured	Closed (fixed)	Normal	Task	Case studies	7	1 year 7 months	1 year 8 months
Promote Tech Coast Angels to Featured	Closed (fixed)	Normal	Task	Case studies	10	1 year 7 months	1 year 10 months
Promote Viraland to Featured	Closed (fixed)	Normal	Task	Case studies	25	1 year 7 months	2 years 8 months
Promote MIT List Visual Arts Center to Featured	Closed (fixed)	Normal	Task	Case studies	14	1 year 7 months	1 year 11 months






Feedback

 **dddave** Credit commented 2 years ago #7
 Interesting case study but definitely in need of some clean up by a native English speaker. Did you modify the interface provided by Media module? Is there a specific back end configuration/server set up?
[delete](#) [edit](#) [unpublish](#) [report as spam](#)

 **leighc** Credit commented 2 years ago #8
Status: Needs review » Needs work
 I've made some edits. Leonidas, could you address Dave's question and let me know once that's done so I can make a second pass with edits? It's starting to look really great.
 -Leigh
[delete](#) [edit](#) [unpublish](#) [report as spam](#)

 **dddave** Credit commented 8 months ago #14
Assigned: dddave » Unassigned
 I had the tab open on my tablet for a good week now. ;)
 I like the case study and overall I am +1 but I at least want to mention that I do find that the part about Glazed is too customer focused and reads in parts as an ad. I think this comes from using "you" to address the reader directly whereas in case studies we usually talk about an abstract user of a site. I think this should be changed to avoid any critical readers in the Planet audience from crying foul. But as always I defer to you, leighc.
[delete](#) [edit](#) [unpublish](#) [report as spam](#)

 **JurriaanRoelofs** Credit commented 8 months ago #15
 thanks for your review! I will schedule some more time to check on the tone of the article. I'll probably get around to this ~~monday or tuesday~~ friday or saturday.
 I don't want to get on the bad side of our critical readers :)
[delete](#) [edit](#) [unpublish](#) [report as spam](#)

 **leighc** Credit commented 2 years ago #2
Title: Promote Top7news to Featured » Promote Viraland to Featured
Issue summary: View changes
Status: Active » Needs work

Hi Leonidas,

Your case study is off to a good start, but in order to promote it to featured we are going to need a lot of depth and detail. What technical challenges did you face in the project and how did you deal with them? The more detailed you can get about what you did and how you did it, the better. Check out some of the case studies in our featured section-- they should give you a pretty good idea of the depth we're looking for.

Fanalala - <https://drupal.org/node/1969782>
Yellow Submarine - <https://drupal.org/node/1612614>
Beer Cloud - <https://drupal.org/node/1625240>

Hope that helps!

Best,
Leigh





What are the problems that you try to fix?

Or, how to take a case study from "good" to "great"





NEW ORLEANS

DRUPALCON 2016

Grammar and spelling problems.

Run a spell check. Get a native English speaker to look over it. If you can, have someone who writes well edit it.



NEW ORLEANS
DRUPALCON 2016

Too promotional.

You did great work. But Drupal.org case studies are for promoting Drupal. **Not** for promoting your company.



NEW ORLEANS

DRUPALCON 2016

Not enough content.

We don't just want to know what you did -- we want to know **how**.
Have an elegant solution you're proud of? Do something clever?
Tell us all about it. Go above and beyond in describing what you did.



NEW ORLEANS

DRUPALCON 2016

It doesn't mention Drupal.

This is a Drupal case study on Drupal.org. ***Tell us about Drupal.***
What did you do? How did Drupal make it easy? We want to know.



NEW ORLEANS

DRUPALCON 2016

It doesn't focus on what matters.

Pick one or two things that are well done and tell us about them. We don't need to know about every module. Find what's ***most important*** and write your case study around that.

Step 4: Everybody does some writing



And some issue queue ping pong.

Me & dddave

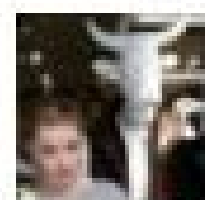


Issue author





Once the case study accumulates a +1 from the Drupal Association (me) and a +1 from a community member (usually dddave), it can be promoted.



[leighc](#) Credit commented 3 months ago

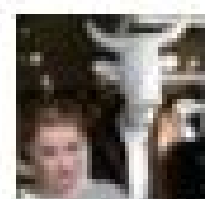
#13

Actually, I just promoted it-- nice work! The site should appear on the front page of Drupal.org within the next day or so.

Thanks for your patience. If you want to pay it forward, please take a look at [this case study](#) and give your feedback -- it's another of the ones we're trying to get to Featured.

Cheers!

[delete](#) [edit](#) [unpublish](#) [report as spam](#)



[leighc](#) Credit commented 3 months ago

#14

Status: Active » Fixed

[delete](#) [edit](#) [unpublish](#) [report as spam](#)





Step 6: Celebratory dance party.





Recommended examples

Need inspiration? Check these out.

- [The Telegraph Travel Guides](#) - Headless, multi-platform
- [City of Chicago, Office of the City Clerk Website](#) - Gov and NGO
- [Forest Park Map](#) - Park, museum, interactive site
- [Wight & Company](#) - Architectural / business
- [First 4 Numbers](#) - eCommerce
- [University of Oxford](#) - Education



NEW ORLEANS

DRUPALCON 2016

THE TRUSTED SUPPLIER OF RACE & EVENT NUMBERS

Race and Event Numbers

Welcome to First 4 Numbers, your specialist printer of race and event numbers. Due to our high quality materials, exceptionally fast service, and our innovative ordering process, we are one of the most trusted printers of event numbers in the UK and Europe.

GET A QUOTE >

Accessories: Special offers

Signs, Barrier Tape, Hi-Vis, Walkways

Shop by event: Weight Lifting and Gymnastics, Dance and Talent Shows

500 YOUR IMAGES & TEXT

720 YOUR IMAGES & TEXT

Customisable Numbers > Design your own numbers and add logos with our easy to use editor.

Basic Numbers > Off the shelf numbers that can be ordered in a couple of clicks.

A map application displayed on a desktop monitor, a tablet, and a smartphone. The desktop view shows a detailed map with various markers and a sidebar with filters. The tablet and smartphone views show a simplified, zoomed-in version of the map.

The Telegraph mobile app interface on a tablet. It features a 'Guides' section with a featured article titled 'Burma' by Gill Charlton. Below the article are navigation options: All 73, Beach 4, Do 22, Eat 14, Shop 15, Stay 18, and My Places 0. There are also recommendations for 'Overview', '36 hours in Yangon', and 'Belmond recommends'.

UNIVERSITY OF OXFORD

ADMISSIONS - RESEARCH - NEWS & EVENTS - ABOUT

"NETWORKED AND TRADING": STUDY CLEARS UP MYTHS ABOUT REFUGEES

NEWS

EVENTS

DESIGN & DELIVERY

Design & Delivery website displayed on a desktop monitor, a tablet, and a smartphone. The desktop view features a large image of a modern building with a red and blue facade.

City of Chicago - Office of the City Clerk

Purchase your Chicago City Vehicle Sticker via EZ-BUY

CITY COUNCIL ANNOUNCEMENTS

2016 Chicago City Budget





NEW ORLEANS
DRUPALCON 2016

**Writing beyond the guidelines:
Making life easier for everyone**



Where the guidelines live:

www.drupal.org/case-studies/guidelines

- Describe the organizational or client goals the project met (or exceeded).
- Explain your approach. Describe why you chose Drupal instead of other options. That may include why the modules you chose were the best fit for your project, why you used a custom theme, etc.
- Write about the project's timeline and milestones.
- Share any challenges and how you resolved them.
- Include clear technical details, tips, and tricks so others can learn from your work.
- Provide data and metrics that show the impact your work has had. These may include more traffic, better load times, or more conversions.





Describe the organizational or client goals the project met (or exceeded).

- Be specific.
- Tell us about pain points.
- Why did they need a new site?
- Who was going to use the site?
- How were they going to use the site?
- People reading this case study should be able to recognize themselves in the conflict, even (especially!) if they have no technical knowledge.





Explain your approach. Describe why you chose Drupal instead of other options. That may include why the modules you chose were the best fit for your project, why you used a custom theme, etc.

- Did you do any user research?
- Were there specific pain points that Drupal addressed? If so, how?
- Tell us about Drupal **as a solution**.
 1. "Our organization was already familiar with it."
 2. Not what we want to see in a case study.





Write about the project's timeline and milestones.

- How did you split up the work?
- Did you use a specific methodology, such as agile or scrum?
- Were there deliverables you needed immediately?
- Were there features you knew would take a long time?
- Tell us about your process.





Share any challenges and how you resolved them.

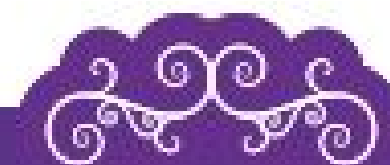
- This is where you can brag.
- Showcase your ingenuity and the elegance of Drupal as a solution.
- Clever workarounds, integration, module use.
- This is where Drupal shines.
- **THIS IS THE MOST IMPORTANT PART OF YOUR CASE STUDY!!**





Include clear technical details, tips, and tricks so others can learn from your work.

- Not "this is the thing we fixed" but "this is **how** we fixed the thing."
- At this point in the case study, anyone who doesn't have deep technical knowledge will probably be skimming, so don't worry about writing for them.
- This is your place to **inspire other Drupalers.**
- Show off how smart you are.
- Do it.





Provide data and metrics that show the impact your work has had. These may include more traffic, better load times, or more conversions.

- AKA the "Did it work" section
- **How well** did it work?
 - i. We should already understand **why** it worked.
 - ii. This is where we get the results
- Not just hard metrics but "soft" ones too, such as
 - "The client is actually able to modify content on their website in under 24 hours!"
 - Or
 - "The workflow was much easier for content editors!"
 - Or
 - "The site is super pretty now!"





[View the presentation on slideshare](#)

If you do all of these things, you will have produced...

(drumroll please)





NEW ORLEANS

DRUPALCON 2016

1. a process or record of research in which detailed consideration is given to the development of a Drupal website over a period of time



NEW ORLEANS
DRUPALCON 2016

2. a particular instance of something used or analyzed in order to illustrate the value of the Drupal CMS

If you nail the definition of a case study, I will give you a high five.

And a +1.





*As you can see, it's a long process to get a case study into the
Featured section.*

And it can take a long time, too.

So how can **you** make a difference?



Now that you're a case study expert, YOU can get involved in the issue queue!





You can weigh in and provide feedback

- You have unique insight to bring to every case study
- When you comment in the queues, you can credit your employer
 - They look good, you look good, we all look good.
- The more people weighing in, the more quickly issue authors receive feedback
- More input often means better feedback
- This is a great way for people without technical knowledge to get involved in the project
- The more quickly the community weighs in, the quicker I weigh in





To get involved, go to:

drupal.org/project/issues/content

To make your own case study, go to:

drupal.org/case-studies





NEW ORLEANS

DRUPALCON 2016

See you in the queues!



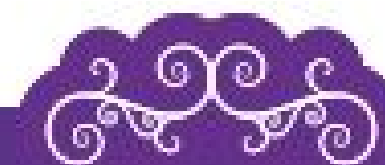
Any questions?





Thank you for coming to my session!

I hope it was helpful!





So How Was It? - Tell Us What You Think

Evaluate this session

[https://events.drupal.org/neworleans2016/sessions/
spotlight-featured-showcase-writing-great-sase-studies-drupalorg](https://events.drupal.org/neworleans2016/sessions/spotlight-featured-showcase-writing-great-sase-studies-drupalorg)



Thanks!