Manufacturing Case Study Template

How do you write a manufacturing case study when the customer can't be named? Describe the customer instead of naming them, keep every technical detail that doesn't identify them, and state the result the way the customer would measure it. This manufacturing case study template has seven fields: the customer described, the requirement, the constraint that made it hard, what you did, the result, what to photograph instead of the part, and the approval.

Give every row an owner and a due date, and work the stages in order. Each item is explained in the full guide at byalkali.com/resources/manufacturing-case-study-template/

01 The customer, described

Enough for a similar buyer to recognize themselves, not enough to identify them.

DONE	TASK	OWNER	DUE
☐	Industry, written the way buyers in it describe themselves.		
☐	Size band, and where you sit in their supply chain (OEM, Tier 1, Tier 2, distributor).		
☐	Region, only if it doesn't narrow the customer down to one company.		

02 The requirement

In their engineer's terms, not yours.

DONE	TASK	OWNER	DUE
☐	Part type and what it does in the customer's product.		
☐	Material and grade.		
☐	Tolerance class, finish or other critical requirement.		
☐	Quantity or run-size range, and the timeline they needed.		

03 The constraint

What made the job hard. One or two sentences.

DONE	TASK	OWNER	DUE
☐	What would have gone wrong with the usual approach.		
☐	Why the customer came to you: a failed supplier, a lead time, a capability gap.		

04 What you did

DONE	TASK	OWNER	DUE
☐	The process and the equipment that ran it.		
☐	The change that solved the constraint: fixturing, sequence, tooling, material, inspection.		
☐	How you inspected it and what documentation went with the parts.		

05 The result, in the customer's terms

DONE	TASK	OWNER	DUE
☐	The before and after on one measure the customer tracks (rejects, stoppages, lead time, supplier count).		
☐	Whether the work continued: repeat orders, a second part number, a program extended.		
☐	A sentence from the customer, in their exact words, if they'll give one.		

06 The pictures

DONE	TASK	OWNER	DUE
☐	Photo of the machine or cell that made it, with nothing of the customer's on it.		
☐	Photo of a test piece you made for the camera, same material, same process.		
☐	Close crop of a finish, weld or feature, checked for anything that reveals the design.		
☐	Caption on every image saying what it shows.		

07 Approval

Before it goes live, within what the contract allows.

DONE	TASK	OWNER	DUE
☐	Check the contract or NDA for what it allows: name, description, images, nothing at all.		
☐	Send the customer the finished draft, words and images together, and say exactly what's named and what isn't.		

DONE	TASK	OWNER	DUE
☐	File the reply with the job: the written yes, or the date you told them it would go live.		

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Checked against the FTC's Guides Concerning Use of Endorsements and Testimonials (16 CFR Part 255) and what manufacturers have told us about proof on discovery and kickoff calls, November 2026.