HOW TO
Write Great Case Studies

Guide for In-House Writers

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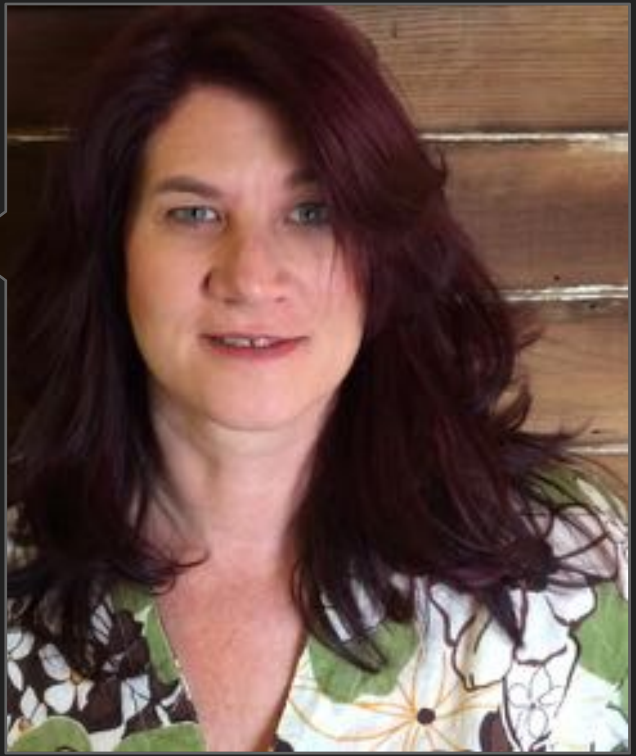
Traci Browne

Traci Browne is a published author and freelance writer specializing in manufacturing, engineering, and robotics. She has written for Amazon Web Services (AWS), Dar Group, Ferrovial, and Morrisgroup International just to name a few.

Traci is a regular contributor to Professional Mariner Magazine, Municipal Sewer and Water Magazine, and Compoundings Magazine. She has also been published in Treatment Plant Operator Magazine, Mouser Electronics' Engineering Blog, Robotics Business Review, Intel IQ, NextBot Magazine, Medical Design Magazine, PM Engineer Magazine.

Traci focuses on narrative pieces that help companies attract prospects and close deals.



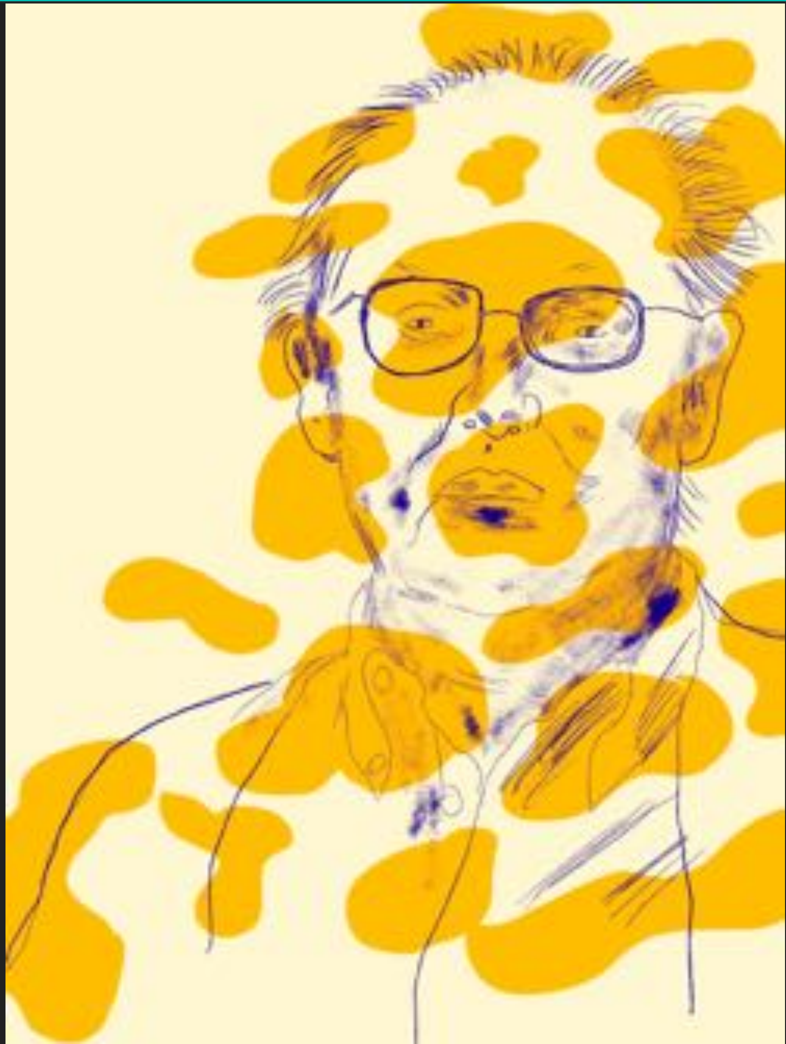
Why Case Studies?

There is nothing more valuable than a Case Study when it comes to convincing a prospect to choose your company's product or service over your competition. Why do Case Studies help close deals?

- Case Studies Provide Peer Validation
- Case Studies Allow for Better Prospect Targeting
- Case Studies Demonstrate HOW You Solve Problems
- Case Studies are Trade Show and Conference Gold

Case Studies Provide Peer Validation

You can tell people that you have the best solution to their problem until you're blue in the face. However, nothing will make them feel more confident in their decision to buy than validation from their peers' perspectives.



Case Studies Allow for Better Prospect Targeting

Your website has to speak to everyone in your audience, but a case study can address the needs of a very specific industry or buyer persona.

Case Studies Demonstrate What It's Like to Work with You

It is not just your solution to their problem that your prospect cares about. They want to know what the implementation process will involve and how easy it will be to work with you.

Case Studies are Trade Show and Conference Gold

Leave the flyers and brochures in the office. The most valuable collateral you can have on hand at a trade show is an assortment of case studies that will cover any question or concern a prospect might have.

I believe so strongly in the value of case studies that I wish I could write them for every company. But I am only one person and I can't get to everyone. That's why I came up with this "How To." I want you to have the information you need to write a credible case study in-house.

Is it better to hire a professional writer to handle it for you? Well, obviously I'm a bit biased, but here's the thing—A halfway decent case study is better than no case study at all.

If you follow these tips and tricks you'll do better than creating a half-way decent case study; you'll have one that's good or good enough. Who knows—**it might even be outstanding!**

Step One: Find the Right Customer

Your sales team is your best source to find the best customers to feature in a case study. After all, they are on the front lines and probably spent a good amount of time getting to know the customer and understand their problem(s). They know why the customer chose your solution, and they were probably on hand throughout the implementation. They also know whether or not the customer was happy with the results.

Step One: Find the Right Customer

Now, here's the tricky part. Sales people can be very territorial when it comes to their customers. They spent and will continue to spend a lot of time nurturing that relationship and suddenly Marketing wants to take advantage of all their hard work. In a nutshell, the salesperson doesn't want anyone bothering their customer and ruining that relationship.

So what do you do?

Step One: Find the Right Customer

The best way to get sales on your side, is to write a case study that features the customer as the story's hero. I've read case studies that sound like the customer was bumbling along barely surviving until, what do you know, the vendor came along and solved all their problems.

Sure, the case study should be about your solution, but write it in a way that demonstrates how smart the customer was in choosing your company's solution.

Step One: Find the Right Customer

I have rarely had an issue getting sales people on board. Even when hesitant at first, they come around when I explain the benefits. I also show the sales person I am sensitive to their concerns by asking them the backstory on the customer, any points I should definitely ask the customer about, as well as any topic I should steer clear of.

Step One: Find the Right Customer

In addition, after the customer interview (we'll be getting to that in just a bit) I share any information I've gleaned that the rep may want to know. This might be an off-the-cuff comment about some trouble they are having, or nice things they said about their rep. Everyone likes to hear they are appreciated, right?

It goes without saying, the sales rep should get to see the case study draft before it goes to their client.

Step Two: Get Customer Buy-In

When you ask a customer to participate in a case study it's best to answer some of the questions they may have before they even ask. First, let them know how much of their time this process is likely to take.

Typically the interview takes between 30 minutes and one hour depending on the complexity of your product or service. Then, figure another hour of their time to review the draft, which brings us to the next point to cover. **Let the customer know you will NOT publish anything until they have reviewed the draft and given you permission to use it.**

Step Two: Get Customer Buy-In

Tell the customer how you intend to use the case study. Will it be printed and passed out at events? Will it be on your website available for download? Will you be submitting it to an industry journal or publication? (I hope the answer to all of these questions is YES!)

Step Two: Get Customer Buy-In

WARNING: Even if your customer contact says they are on-board and happy to participate, there is one more step you need to take.

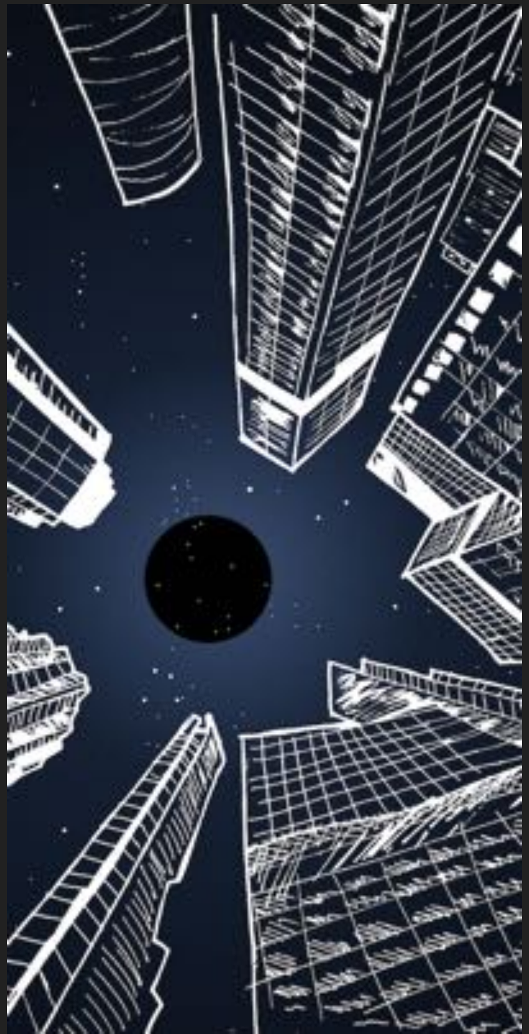
Unless you are talking to the company CEO, you want to ask your contact to check with their executive team or legal council to make sure they are allowed to participate.

Some companies have very strict rules against doing anything that sounds like they are endorsing a particular product or company. And often they simply don't want anyone to know they had a particular problem that needed to be solved. **The time to find out if that is or is not the case, is before you get too far along in this process.**

Step Two: Get Customer Buy-In

Should your customer come back and say, "I'm not allowed to do it" all is not lost, YET.

Ask them if you can create the case study without naming them but referring to them as "a major pharmaceutical company," or "a Fortune 500 accounting firm," or whatever moniker will make them anonymous.



Step Two: Get Customer Buy-In

If that's a no go too, try one last thing. Ask if you could conduct the interview and write up the case study to only be used for internal training purposes. Case studies are great reading material for new hires to get up to speed on what your do for your customers. Not just sales people, **but all employees**.

Just be careful going this route and make sure that three years from now, someone doesn't get a hold of the case study and start passing it around to prospects because they didn't know the deal. I suggest watermarking it very clearly, **NOT FOR EXTERNAL USE**.

Step Three: The Interview

Obviously, you will arrange a time and place or method to conduct the interview. I always use a method that I can record the call*, either with a recorder if the interview is in person, or through an app such as Tape a Call or a conference call service with a recording feature. Be sure to send a calendar invite and then follow-up with a reminder a day or two before your scheduled call.

Step Three: The Interview

***BIG TIP:** *Test your recording method before getting on the phone with the customer. I found out the hard way that my new headphones were not compatible with the recording software I was using. I ended up with 30 minutes of complete silence.*

Step Three: The Interview

I like to send my questions to the customer beforehand just so they can better prepare. **Make it clear that you do not want them to fill out their answers**, but that they are just a reference in case they want to think about their answers before your call. Again, remind them that there is no pressure because they will be reviewing the case study and have the option to change anything in the draft they wish to change.

Step Three: The Interview

Some Questions to Ask:

1. What specific challenges or problem were you trying to solve.

   A great follow-up question if their answer is vague or underwhelming is, “Can you tell me what that felt/looked like?”

2. How were you trying to solve the problem once you noticed it?

Step Three: The Interview

Questions to ask:

3. What made you decide to consider us? Did you read about our solution, see us at a trade show, talk to a peer, or just get a sales call at the right time?
4. What other products/services did you consider and why did you opt not to go with them.

(I recommend not mentioning competitors in the case study, and often the customer doesn't want to either. You can still use the information without naming names.)

Step Three: The Interview

Questions to ask (cont.):

5. Did we mess up anywhere along the way? If so, did we resolve the issue to your satisfaction?
6. What value do you place on our product or service? (Depending on your product or service you're looking for specifics here. Were there savings as far as cost or labor? Were their increased profits? Is there a specific ROI they can identify?)

Step Three: The Interview

Questions to ask (cont.):

7. Talk to me about how your day is different compared to back when you were having that original problem?

   (This is where you can get some color for your story. It doesn’t have to be all dollar signs and numbers, it might be something as simple, but incredibly   valuable, as I get to go home on time and be with my family.)

Step Three: The Interview

Questions to ask (cont.):

8. Were there any unexpected benefits? Were other departments affected positively?
9. Can you name one thing that stood out to you? Maybe an employee you dealt with during the install or an interaction you had with customer service, or even billing?

Step Three: The Interview

Questions to ask (cont.):

10. Is there anything I didn't ask you that you think someone in your position would want to know?

    (I don't include this question when I send the list of questions, this is only for the actual interview and it is the ***mother of all questions!*** *Again, let them think about it and let them fill the silence after you ask it.)*

Step Three: The Interview

Interview Tip:

It's a good idea to start your interview with simple questions to get the interviewee warmed up and relaxed. However, some people take longer to relax than others.

If this is the case, once you get to the end of your list of questions and you find they are more talkative, go back and tackle any answers that left you unsatisfied. Try, "I'd like to go back to what we were talking about earlier…" then ask the question again, but with slightly different wording.

Step Four: Write the Draft

Don't try to get too creative with your structure. You want the information to be easy to digest and it should appear in a logical order.

1. Customer Background
2. The Challenge
3. Alternative Solutions (Optional)
4. The (Chosen) Solution
5. The Results
6. Wrap it Up

Step Four: Write the Draft

Customer Background:

Include just a paragraph or two on basic information about the customer. You can often find boilerplate copy in a press release written by your customer, on their website, or ask for it during your interview.

The Challenge:

A brief description of what they were grappling with and how was it impacting their business. Try to keep this section under 200 words.

Step Four: Write the Draft

Alternative Solutions (Optional):

Sometimes it helps to bring up tried and true methods of solving a problem if your solution is unique or, shall we say, a bit avant-garde? If your prospect is going to think, "Why didn't they just do X?" then you want to include alternative solutions your customer considered and why they chose not to proceed with them.

The Solution:

A brief description of your product or service and how the customer discovered you and why they chose you. Keep this short to avoid this section becoming a sales pitch or sounding way too market-ey. Let the customer pitch your product in next few sections.

Step Four: Write the Draft

The Results:

This is going to be the meat of your case study. Include specifics when you have them, but also paint a picture for the reader. Break it down by section if they received multiple results (see question #8).

Wrap it Up:

The best ending is a good quote from the customer that represents their overall satisfaction with your company and your solution.

Step Five: Submitting the Draft

As I mentioned earlier, you want to keep the salesperson in the loop. It's a good idea to show the draft to them before passing it on to the customer. There are two reasons for this. One, it's what you promised when you first talked to the sales rep. Two, the customer may have misremembered something that happened. You want to make sure you got your facts straight. Give the sales rep a date you need to have the draft back. Sales people are busy, and if you leave it to them it could be months before they get around to it. Once the sales rep is happy, then off it goes to your customer.

Step Five: Submitting the Draft

At this point you're going to need some patience. On a list of priorities, reviewing your case study draft is somewhere near or at the very bottom for your customer. Don't be surprised if it takes a month for your customer to get back to you. It's very likely it will have to be reviewed by your customer's legal, executive, and communications teams. **And are you ready for the bad news?**

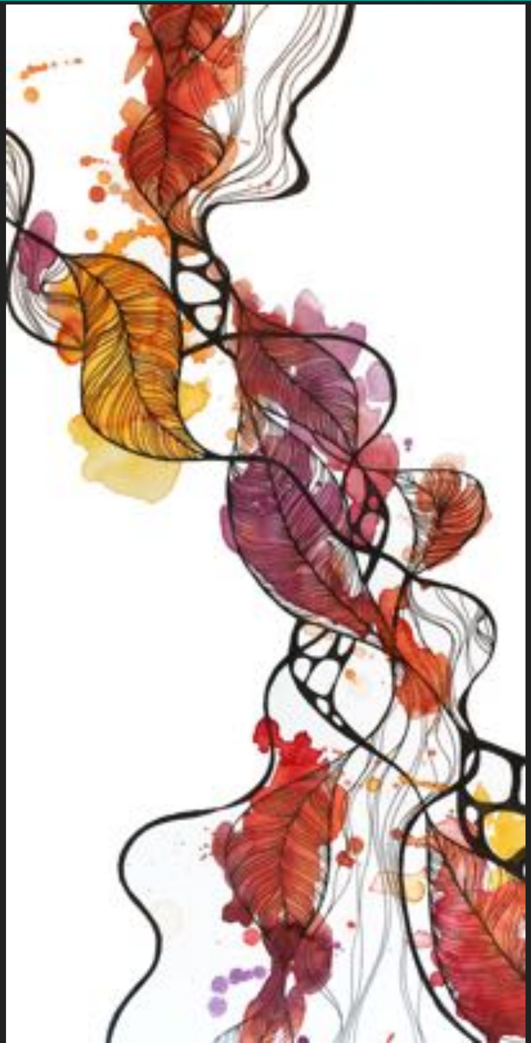
Step Five: Submitting the Draft

Your customer might still pull the plug at the last minute. It's rare, but it does happen on occasion. If this happens, go back to the advice given in step 2 and see if you can publish the case study anonymously, and if that is also a no-go, ask about using it internally. But please, handle any rejection with grace. They are your customer and the relationship is far more important than any case study.

Step Six: Make it Look Pretty

You don't have to hire a designer, although they can often do a far better job, you can use Microsoft Word or a similar tool. I made this e-book using PowerPoint. A designer would have made it look better, but if you made it this far it's clear it's doing a perfectly good job.

Pick a nice brochure or newsletter template, swap out a few colors to match your company branding and add a few pictures and you'll have something that looks professional. Remember, good enough is better than nothing.



Step Six: Make it Look Pretty

"Sprinkle a couple pull quotes throughout your document."

Pull quotes can be those little nuggets that the customer gave you during the interview that show off your company in the best possible light.

Step Six: Make it Look Pretty

One thing that I do recommend is adding a side bar that includes key pieces of information from the case study. Who the customer was, what industry they are in, and key benefits achieved. Think of it as the cliff notes version. If your case study is very complex, you also might want to include an executive summary at the beginning. That way, the decision maker can skim it and pass case study along to the right person to read in-depth.

Be sure to include your contact information. Make it stupid easy to get in touch with you in multiple ways.

Congratulations!

You now have a case study that will be incredibly persuasive to prospects who are on the fence about which solution to choose. In addition to the material you used for the case study, you probably have some information from the interview you can pass along to your R&D department and the sales team.

Now that you see how easy that was, start rounding up some more customers and get a few more case studies in your arsenal. Try to find customers in different industries, or with a different challenge. Think about objections your prospects bring up, and see if you have a customer who will refute them.

Want Help?

If, for whatever reason, you decide you don’t want to tackle this on your own—Give me a call or shoot me an email.

I’d be happy to chat and to see if it is something I can help with.

Or, if you just want clarification on something you read here, drop me an email with your question.

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Did you like the artwork in this little e-book?

Check out https://mixkit.co