

Writing a Successful  
**CASE STUDY**



A WHITE PAPER

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# 1

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## Writing A Successful Case Study



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## Summary and Overview

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A case study is an in-depth breakdown of how your product or service increases a customer's success.

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### Why Should I Create a Case Study?

Case studies are detailed looks at increasing profits, increasing productivity, and increasing the health or wealth of your client in any way. They are not simply testimonials, which are consumer statements confirming that they use your product or service and that they receive good results from it. Instead, case studies look deeper into how your customers benefited and why your product or service specifically worked for them.

A case study is a great marketing tactic that is multifaceted. You can use case studies in every medium that you use in your marketing portfolio. It is flexible in size and scope, allowing you to reach any market that you focus on.

Increase sales or exposure with case studies by connecting with new customers on a deeper level. An excellent case study will allow people to see themselves benefiting from your product or service through the success stories of others.

Create multiple case studies with multiple clients. When potential customers are researching your business, trying to decide if they're going to hire you or buy from you, the more successes you can show them, the more likely they are to trust you to do the same for them. You probably are already doing this on a small scale already. Now, you need to take it to the next level.

A great case study will target a particular business goal or industry with a highly-tailored solution. It will be focused down to a specific area or a specific type of customer. The key is to simplify the scope and focus on the emotional triggers of success.

Marketing is about stirring the emotions of your customer so they will buy from you, and a case study that transports a potential customer from an observer to an active client is the case study that grows your customer base.

You will learn how to narrow down your case study, how to prepare to write your case study, and what to do with your case study once you're done with one of the most powerful marketing tools in your arsenal.

## How to decide what to write

Making a decision about what case study to write and what success story to focus on can be daunting. When you think of all of the success your business has had and all of the breakthroughs you've seen, there are a hundred stories you want to tell. But there is a strategic reason to pick one case study over another. If you take some time building a map of what your goals are for generating case studies, the choices will become clear.

### Target Industry

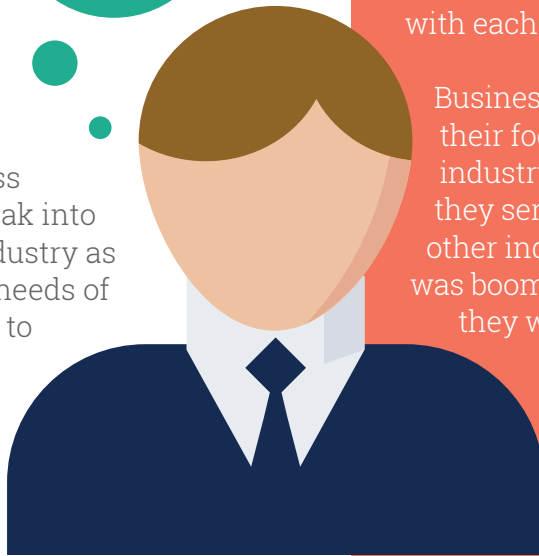
Case studies can solidify your proven success in an industry you work with or help you break into new target industries. By using a specific industry as your guide, you can be laser-focused on the needs of that industry and prove your product's value to their bottom line.

Targeting specific industries for case studies can help you diversify your client base. If you are looking to break into a new target base, using the few clients you have in that industry as case studies can help you two-fold. You will learn how to market to that industry, and from a business standpoint, you will learn how to provide for that industry specifically.

### Your Unique Solutions

Try looking at the services that you provide as the base of your case studies. If you have a number of targeted solutions, each one of those products or services needs its own case study.

By focusing on each solution, it can help you crisscross some of the industries by targeting a specific problem that multiple businesses have. Think of the common things that all of your clients look to your product to solve. Then, when writing the case study, focus on the common emotions that your solution brings to people. You'll read more about targeting emotions in the writing/producing section.



### Mini Case Study - Diversify Your Target Industries

Two businesses targeted the oil industry. Working in the same town, they provided different services, but were not in competition with each other.

Business A put all of their focus on the oil industry, even though they serviced many other industries. Since oil was booming, that's where they were focused.

Business B put a lot of focus on the oil and gas industry, however, kept making efforts to target other industries that were not nearly as lucrative, allowing them to still make inroads.

When the oil prices fell, and the bottom dropped out of the market, Business A suffered greatly and had to lay off almost half of their employees. Business B suffered as well, but had enough diversity in their client base that they were able to weather the storm with a loss of profits, but no loss of employees.

## Client-Based Case Studies

Perhaps your target market is individual people, not industries. People are diverse, but they also fall into a few “types” that are perfect for case studies. Look at your client base and pick out your best customers - the ideal clients. These will be the clients that you spend 20% of your time on and make 80% of your profit from. What are their roles in life? Are they industry professionals, parents, health-conscious, couch-potatoes, sports fans, tech-geeks? Whatever their “roles” are will tell you what kinds of case studies will best reach them.

## Be Specific

The more “types” of people you try to put into your case study, the less effective it will be. People are emotional beings. It’s ok to focus on a number of reasons why a person with that role in life will enjoy your product or service, but don’t try to target multiple life roles in the same case study. If you’re going after moms, then only go after moms. Don’t try to add in grandparents and nurses and teachers all in the same study. Yes, those others can also be moms, but it can muddy the waters because grandparents, nurses, and teachers aren’t all necessarily moms. Keep it simple.

## Tap the Untapped

A great reason to create case studies is to break into new markets, new industries, and new client bases. Even if you don’t have any clients yet in that new, untapped area, you can write your study in such a way that those new eyes can recognize their own needs being met by your product or service. You can find common ground among your best customers and potential customers in a new industry.

## Support Larger Business Goals

No matter how you look at it, case studies are amazing marketing tools. You can get new people to buy in and buy your product by getting them to recognize their own needs being met by your product. Sometimes businesses use their success selling one or two base products to support the research and development on new products and breakthroughs.



## Mini-Case Study

A small theater company in Colorado focused on building a large children’s theater company to support their work creating new and unknown original productions. The children’s theater shows were low-cost to produce, with large casts of children, which brought in large amounts of ticket sales with parents, grandparents, and other family members attending the shows multiple times. The income from these shows allowed the company to create new shows without the pressure of needing to sell a large volume of tickets for the unknown new productions, which were not as well attended as the kids’ shows. This allowed artists the freedom of research and development on new scripts without worrying about keeping the lights on.

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## It's All About the Base

Case studies help businesses focus on and grow their client base. Whether your business is new and needs to start with growing a bigger or more diverse clientele, or your market is very targeted, case studies will help you solidify your value to your target base. A strong customer base is especially important if you're in a volatile industry. Having a big and diverse enough client list can help you weather the ups and downs of any industry.

## The Diehard Loyal Clients

Use your customer loyalty to create case studies. Passionately loyal customers make great case studies for many reasons, not the least of which is their willingness to let you talk about their success in depth. Collaboration with your clients is an important piece in writing a case study, and loyal clients are great spokesmen for your brand. They not only provide for great content, but they also help you with marketing later on to get their own name out there.

Having a big and diverse enough client list can help you weather the ups and downs of any industry.

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## A Formula to Prepare

Before you can start writing a case study, there is much to prepare. Even if you are hiring a professional writer to help you, they're not going to make it up out of the blue. You will need to provide the research and content. Good preparation will make the writing much easier. The following guide will help understand the preparation you will need to do.

### Convincing a Customer to be a Case Study

There is so much information about a customer's success that is necessary when putting together a well-done case study. It must include their help. You need the customer to be onboard with your outline for writing the case study, as well as where you're going to publish, print and post it. You will be using their name and their experience with your company. They need to give you their permission and their enthusiasm for the case study to be the most effective.

The buy-in should be easy. Make sure that your customer gets something out of it. Make them understand all of the places their business will now appear and the extra advertising that it would mean for them. Think of other little perks to offer them, the kind that will make your business relationship stronger.

### Co-op

Whenever possible, think of co-op opportunities with your customer: from cross-marketing in print ads, television and radio commercials, to cross-linking on all of your digital media. You will already be printing the case studies, and perhaps there are ways that it would make sense for that customer to hand out some of your print pieces. When it comes to some traditional advertising spaces, however, sharing the cost should at least be discussed, and cross-linking digital platforms should definitely be part of the deal.

### Be Organized

There is nothing that will crash a project faster than being unorganized or unfocused. You are asking a customer to spend time on a project that will mostly benefit you. To waste their time would be a shame. Create a question list, a data point list, and know what your target is going in. You need to know who you will be marketing to before you spend your customer's time on this case study.

### You have the plan

Don't forget that this is your case study; you have the need and the plan. Don't expect your customer to come up with the content on their own. Don't simply send them an email with your list of questions and data points and expect them to take a ton of time filling it out.

Give them a heads up of the kinds of things you will be asking them. They will need some time to think about how they will be providing the data, which data is safe to share with the public, and how much they want to put into your efforts. Be available for their questions, and always be reassuring that you will not waste any of their time.



## Make meetings/interviews work for your customer

Be prepared for your research to occur on your customer's terms and timeline. We are all busy people, and so are your customers. Be respectful of their time. If at all possible, pare down your questions to keep your meetings as short as possible, and if more than one meeting is needed, be accommodating. If they're not prepared with all of the data you were asking for, be patient, and set another meeting to complete your questions. Also, be willing to meet outside of work hours if it fits best with their schedule.

### Customer Research

#### The Discovery

Your conversations with your customer should lead you to the solution that you want to focus on with their case study. Know your target message going in, but be open to discovery. You may think you know how this customer achieved success with your product or service, but the details that you uncover will help you pin-point their exact needs and your solution to their problem.

#### The Issue

Describe the problem that your solution specifically addresses as it relates to the customer. Detail their particular problem and their unique needs. Don't worry about broadening it out to the rest of the target market just yet. The creative writing will do that later.

#### The How

How did your product solve the customer's issue? Get details on how the product gets used, who in the company uses it, how much time they spend on/with it, and how exactly it was put into place in their company.

#### The Benefit

What was the ultimate benefit of using your product or service? Anecdotal evidence is

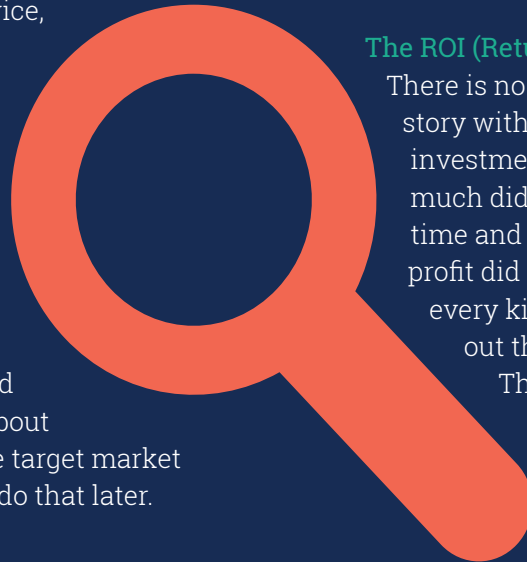
perfect. Get stories from your customer, from their employees, and from their customers if that applies. People connect to stories, so have your customer describe the benefits they noticed when using your product.

#### The ROI (Return On Investment)

There is no such thing as a success story without a tangible return on investment. Get the numbers. How much did your product save them in time and money? How much more profit did they see? ROI applies to every kind of product or service out there - even the intangibles. The customer can now do something they couldn't do before, and your case study needs to quantify that.

#### The Visual

Part of your plan with a case study is to publish your findings. We live in a visual world, and you need to make sure that there are visuals that go along with your study. Create a photo plan, video plan, collect logos and any other visual elements that your designer can use to create a visual appeal that matches the strength of the content.



## Writing and Producing

### Writing: Foolproof Techniques

Any good writer knows how to capture people’s attention with their words. But if you don’t consider yourself a writer and have been put in charge of writing the case study, follow these quick techniques to be on your way to creating a great case study.

### Powerful Opening

Start by looking at all of your research and figuring out what the most important piece is. Forget the set-up. Don’t tell a story that eventually gets to the meat and potatoes of the success; start with a bang. “Company A increased their sales by 75% in 10 months by using our product.” Then, you can tell the story. If you remember back to English class, writing should tell your audience what you’re going to tell them, then tell them, then tell them what you told them. The beginning needs to be the spoiler, so give them the goods first. You can’t risk your reader not being interested right away. That might be all they need to hear to be sold on choosing you.

### Catchy title & subtitle - think social media

Thanks to social media, you need to create a catchy title with an enticing subtitle to capture attention. This may be less necessary for captive audiences, but it never hurts to use your one-liner on everything from print pieces to video titles. When digital versions of your case study are shared on the web, you’ll want to be sure your catchy title travels well across all channels.

### Connect with your audience

Your content has to make a connection with your audience by finding the common experience, so make sure you know who your target market is. If it helps, make a list of everything your customer and your target audience has in common. Pick out some of those keywords and make sure to include them in your writing. How many keywords you use will depend on how long or short the format you’re writing for is. Try to stay away from conventional keywords and go for the ones that elicit strong emotions.

## Multiple formats for each case study

Plan multiple formats for each case study:

### ✓ The long version

Use an entire page on your website to show and tell everything about your client’s success with your product or service. Here you should link to a video, link to a podcast interview with your client, or write a 3,000-word article and not worry about taking up too much space.

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### ✓ The short version

Highlight the relevant facts with a short anecdotal story that connects with people quickly. Use this version on flyers, rack cards, social media, and anywhere you are limited by the space of a few paragraphs.

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### ✓ The teaser version

When you are restricted to a few lines of text and possibly a small image, you need to have a short, to the point, entice-people-to-read-more-elsewhere version of the case study. These often read like quick testimonials, but with statistics. ROI is a must for the teaser version. These need to be a mini-content explosions.

## Empathy

Your audience must see themselves in your client's story. It has to open the door to reader empathy. When they can see themselves in your customer's situation, needing a similar result to happen for them, that's when they begin to consider your product. Make the case study as personal as possible. Even if you're selling to a corporation, companies are made of people, and it is a person that will be reading or watching this case study.

## Storytelling - people love stories

Tell the story, and incorporate feelings in the storytelling. People love stories because they stir their passions. Were the clients fearful of something bad happening? Did they rejoice when they saw success? Was their sadness at a lost opportunity turned to pride in the success of their continued efforts? Stories start with a heavy or foreboding mood and end with light or fulfilling sentiments. Don't underestimate the power of emotion when your goal is to get a reader to be stirred into action by your case study.

Your client's involvement is fundamental to your case study's success. Verifiable names and results are the key. You can't make anything up.

## Include meat

Quantify your customer's experience. There needs to be real numbers; solid evidence of success. Use figures in the storyline alongside the emotional storytelling. Don't leave the statistics just as a list at the end or only as a pie chart or graph. Graphs and charts are good to use if you have space, but incorporate them into the story to show their real value. Numbers and ROI have emotional value.

## Connect customer success with what the reader needs

Your reader must see the end result for them within the telling of your case study. Write it in a way that helps people see their own success. It cannot be so unique that it's not relatable. What's in it for them? Show them how easy it is for them to get the same result.

## Client satisfaction - Real people, Real names

Your client's involvement is fundamental to your case study's success. Verifiable names and results are the key. You can't make anything up. Don't be tempted to create a case study based on conversations you've had with a number of clients. Readers can tell when it's not genuine, and reality is always more interesting than fiction.

## Spread the Word

Once you have a case study, you must spread the word and use it as the powerful marketing tool that it is. Publish it in multiple formats from print to digital, to video, and even podcast. Here are some ideas for getting the most out of your hard work.

### Print

There are many print options for you to think about. To narrow it down to the best options, think about how you will use this case study.

#### » Conferences

Rack cards, flyers, and handouts are great uses of your case study when attending conferences and trade shows. These distinct print pieces can be great tools to introduce your company to a diverse group of people and give them an idea of how you can help their business in a short and distinct handout.

#### » Direct Marketing

Postcards mailed out to potential customers are a perfect use for case studies. Nothing says success better than seeing a current customer's success. Including your case study on your printed materials is a great use of space any time you use direct mail to prospect.

#### » Face to Face

If you have direct meetings with potential clients, make sure to add a handout of your case study into your sales folder or other meeting materials. In your place of business, have a stack of case study handouts, rack cards, flyers, or postcards for your visitors to pick up.

#### » Wall Art

A gift to your customer and a gift to yourself should be a framed version of this case study that hangs on your customer's wall and your own wall. When you or your case study customer have

potential clients waiting in the office, they're going to look around their environment, and, in this case, read your case study on the wall.

### Digital

The case study is the perfect digital content. Include a pdf version on your website that can be downloaded by web visitors and easily shared through email or social media. Also, think of creating blog posts using the case study that can also be easily shared. Your e-newsletter should include your case study when you first publish it, and you should continue to reference it on a regular basis in future e-newsletters.

#### » Easy to Find

You should have made multiple formats of your case study through print and digital platforms. But no matter how you use it, you must make it EASY TO FIND!!!!

There's no such thing as sharing your case studies too much. Hand them out at every opportunity. Share them online as much as possible. Write as many blog posts and digital articles as you can think of. Your case study is proof of your success, and you need to make sure your potential clients see it.

## Conclusion

**There is no better connection with your potential clients than the kinds of stories that transport.**

There is much to think about when creating an excellent case study. You must consider the time involved, the case study client, the primary focus or target, and the writing itself. Once that is done, the marketing of your case study needs time and attention.

In the end, the effort is worth it. There is no better connection with your potential clients than the kinds of stories that transport. The most powerful part of this kind of marketing is creating a successful emotional connection that a list of product benefits can never come close to matching. We don't see ourselves in lists. We see ourselves in other people. When their success can be our success, we're hooked!

You can reach people where they are through the flexibility of case studies. From print to digital, wherever you market, you can use your case study to bolster your value proposition.



## About Your Sponsor

We created this white paper on case studies to help you through the process every step of the way on your marketing journey. Our creative team is here to offer everything you need to take full advantage of the power of your case study.

When you come to us for help with producing your case study, we have creative people who work to bring your ideas to life. We are a one-stop-shop for all of your marketing needs. We understand how all the pieces fit together, from logo to slogan to the final marketing pieces. We are great at creative services and will help make this incredible process as smooth as possible.

When you are ready to create a case study or create any marketing campaign, look to us for expert service, expert advice, and great ideas for your print materials. We are here to serve you and help you build your brand. Contact us today.

### Contact Us

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