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# how to write a case study

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Case studies — also known as customer success stories — are a valuable marketing tool. Sure, your prospects will read your brochures and websites. But, they'll take what they hear from you with a grain of salt. Customer success stories tell the story of your company through your client's eyes, and as a result they carry a great deal of weight with your prospects.

From a very high level bird's eye view, a case study needs to address: the challenge, the solution, and the results. Instead of focusing on the job itself, focus first on the insight that solved the client's problem. Reveal the business pain that needed to be addressed. THEN share the quantifiable results. THEN explain how those results were achieved. Work backwards from the benefits to how you delivered them.

The best case studies set in motion a sequence of prospective customer thoughts and actions that ultimately lead to a sale.

### **Seven Steps to A Good Case Study**

#### 1. **Client selection**

First, pick the client you would like to see featured in your customer success story. Their overall experience with your company should be positive, and they should have measurable results to show your company has created a return on investment for them. Once you've selected your client, ask for their permission to tell their success story and explain what's in it for them — for example, increased brand awareness and possible media attention.

#### 2. **Writer selection**

You have two options for writing your case study: outsource the project or create it in-house. Many companies choose to use freelance copywriters because it's often easier for clients to share their opinions with someone outside your company.

#### 3. **Interview process**

Before interviewing your client, gather all the information you can internally. It pays to be prepared. During the interview, ask open-ended questions about the challenges the company faced, why they chose you as their solution, and what type of results your solution has generated. To accompany your case studies, ask clients to write a short (no more than a few paragraphs) testimonial that you can include with the case study.

#### 4. **Writing**

The typical format for case studies is background, challenge, implementation, and results. Essentially, you are presenting the customer's story from beginning to end. But, feel free to use creative headings or even change up the format if it makes sense. Customer stories can tend to be formulaic, and a little variety shakes things up. Be sure to include as many hard facts and return on investment numbers in the case study as possible — facts and figures are the best way to demonstrate results.

Some guiding copy-writing principles:

- Break copy down into sub-headings, so that it is easy to scan
- Sign post copy with highlighted key phrases
- Pull key benefits out by highlighting them
- Where possible, break copy down into bullets and lists

#### 5. **Review and approval**

Carefully review the final customer story, and have your client do the same. Keep in mind that several people at your customer's organization may have to sign off on the case study project — including

marketing, public relations, and the legal department. This can sometimes take time, so be patient and follow up when necessary.

6. **Design**

Use a graphic designer from your in-house graphics department or a freelance designer to lay out the case study with plenty of graphics and white space. Pull quotes, sidebars, charts, graphs, and photos make interesting additions to your customer story's layout. If you don't know any freelance graphic designers, your freelance writer can likely recommend one.

7. **Distribution**

Once your case study is finished, get the word out. Send it to bloggers in your industry, trade journals, the local media, your email lists, and include it in your newsletter. And, make sure to print up some copies for your sales force. They'll find it's a powerful tool to use throughout the sales process.

**How To Use Case Studies as a Sales Tool**

Remember, your case studies could close a deal for you, as prospective buyers want to know that your product can solve their problem. It's likely that you already have solved their problem before. Case studies show them that you have!

- Use case studies and related testimonials on your website
- Include case studies in your sales literature
- Provide copies of case studies to your sale force
- Distribute case studies in trade show collateral
- Highlight abbreviated case studies in your monthly newsletter (if you have one)
- Post case studies on LinkedIn using SlideShare.com
- Link to case studies via Twitter and Facebook for promotion
- Submit case studies to bloggers
- Send case studies to industry/trade media – you might secure a feature story!