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*Writing That Means Business*

*6 Steps to a  
Compelling Case Study*

## 6 Steps to a Compelling Case Study

Case studies, or “customer success stories,” are some of the most versatile marketing pieces there are. Once you’ve done the research and gotten the Opportunity, Challenge, Solution and Results down in compelling language, you’ve created a base from which all manner of good things can flow - in both space and time!

**Space:** You can repackage parts or all of the case study to add pizzazz into your various marketing channels. Typically, the basic case study becomes part of your print repertoire, as a leave-behind at meetings and conferences, for example. A version of the printed version should go on your web site, but be augmented with additional testimonials, links to related case studies, and links to other related content (eg. you have a white paper on the technique you used to delight your case study client). Shorter versions can go into your newsletter, where you provide a way for readers to see the full version on the web or request the print version in the mail.

**Time:** You can also use pieces of the case study throughout your selling cycle. In your initial contacts (voice mail, email), you can use tidbits from the measurable results as teasers. A followup can use the shorter summaries you put in your newsletter. When the client is truly interested, send him or her the printed version with a note that an augmented version of it can be found on your web site (provide the link). Finally, when the client needs the final convincing, you’ll have your set of related case studies ready to spring.

More ideas on leveraging your case study investment can be found at the end of this article. In the meantime, the more compelling the case study, the more value you’ll get. Here are six steps that will greatly enhance your final product:

*Case studies can be the foundation of a wide set of marketing communications*

*The trick is to do them right, then leverage the results.*

**STEP #1**

### Articulate the objective

The number one key to success in drafting a compelling case study is to be absolutely clear on what the marketing objective is. Understanding the objective is key to asking the right questions in the customer interviews; making sure your case study is a coherent story and not just an organized collection of facts; and insuring that the story being told is relevant to your audience and business objectives.

***Start with the end in mind.***

**STEP #2**

### Talk to the customer

Once you're clear on the purpose, interview the appropriate person(s) at the customer's company. Try to talk to the most senior person directly involved with the project.

Start by getting the customer to talk about the project in an open-ended way. You might discover an even more compelling marketing story by listening to what the customer was delighted by.

- Then, regardless of what you have found so far, steer the conversation to the ground your initial marketing objective needs covered.
- Be alert to quotable material from the customer. If nothing arises, be ready with a "suggested" quote that supports your marketing objective and ask if you can use it.

***Remember, what you think was wonderful about the project may not be what your customer thought was wonderful.***

**STEP #3**

### Then, talk to your project people

Now that you have a good idea of *what* made the customer a satisfied one, talk to your project people and ask them *how* they did it. Be sure you understand the technical details directly and

***Now that you know "what" was great, ask how it was done.***

specifically related to that customer's satisfaction. If there are other unrelated but compelling technical accomplishments, you *can* include them in the case study, but put them somewhere where they won't distract from the main story flow (in a sidebar or copy box, for example).

#### STEP #4

### Draft the case study

- Use the standard case study storyline (Opportunity, Objective, Solution, Results) wherever possible. It's what people expect, and using it will help them focus on the story you're telling instead of trying to figure out the navigation.
- Use straight-forward, conversational language regardless of whether you're addressing the audience's specialist group or its management (besides, you never know). Use just enough jargon to establish that you are technically conversant with the subject and let it go at that.
- Add graphics, charts, tables, call-outs, and/or quotes to enhance the visual appeal and to reinforce key points. As a rule, these additions should *supplement* information in the main narrative, not duplicate it.
- Remember that you are telling a story. Repeat key words and phrases throughout the narrative to help the reader follow along as you build up a clear and compelling picture of *how* this customer's success supports your marketing message. For example, if your marketing objective is to communicate "excellent customer service," then use that exact phrase in the Opportunity, Objective, Solution and Results sections. Many case study writers make the mistake of avoiding repetition (it's what they teach in writing school), but in business, repetition is king. The other key to telling a story and not just relating facts is to use transitions to propel the reader forward (note the first

***Keep the format simple,  
do the expected.***

phrase in items (2) and (3) above).

- The results section should (ideally) have two things: a *tangible* measure of the success, and a quote from the customer that states or reinforces both the tangible *and* *intangible* measures of the success (for example, “They were on time, on budget, and always a pleasure to work with”).

***Don't overlook the intangible outcomes - they're often what can sell one company over another!***

#### STEP #5

### Get the customer's buy-in

Getting the customer's approval is a little controversial, but I believe in it. The primary reason is that if the customer's completely on board, he or she becomes your advocate and ally. You can also then provide the reader with a willing customer contact to call, making the case study more credible. Secondly, reading your draft might inspire a fresh idea or two from the customer that you can use. Third, the customer provides a great set of eyes for catching errors.

Spend the money to set up an attractive graphical template for this and future case studies. It doesn't have to be fancy or expensive, just attractive and inviting. The template should allow for side bars, floating copy blocks, and photos with captions.

Put your draft copy into the template before you show it to the customer so that they can see the total effect: main copy, side bars, and graphics.

#### STEP #6

### Polish and publish

Finalize the copy and get it out there!

Now that you have it, use it for all it's worth (which is a lot!)

**Leverage, Leverage,  
Leverage!**

*Here are 10 suggestions on getting the most out of your case study investment.*

**First - using it as is (printed):**

- As a leave-behind on prospecting calls
- As a show piece in your lobby area
- As free download on your web site
- As an extra in a direct mail package
- As part of a follow up to a prospect inquiry.

**And, with a little bit of tweaking:**

- As a web page - An expanded version as a content page on your web site, with links to other content-rich pages (a related white pager, for example)
- As a web page - as a destination for links from your client list and/or testimonial pages
- A shortened version as an article in your newsletter
- Rewritten, as a press release to a trade publication
- Re-framed, as a give-away piece for the satisfied client

Finally, to ensure that your next case study can do all that, spend some money to get them right:

1. Hire a professional designer - and make sure the design melds with the rest of your marketing "look and feel."
2. Hire a professional writer - it can mean the difference between what is simply an organized collection of facts, and a compelling story that pops off the page.

***If you'd like professional help with your next case study, get in touch - the initial consultation is free and results are guaranteed.***

***- Michael Kelberer***