

6 steps to a compelling case study

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.

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.

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 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).

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 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").

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.

6. Polish and publish

Finalize the copy and get it out there! By the way, there are a million ways to use a case study and leverage the work and resources you've put into it. Subscribe to the blog (www.writingthatmeansbusiness.com) or contact the author for ideas.

For more practical advice on successful business writing, visit
www.writingthatmeansbusiness.com

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