# The Power of the New Case Study

*Creating convincing case studies*

*By Jean Van Rensselar*

Suddenly case studies are everywhere. Why? In the wake of the social media frenzy, we're reminded that there are many things social media tools don't do well – convincing prospects to buy is one of them.

Because of the highly strategic sales process, B2B marketing requires a lot of copy – which is why advertorials, white papers, Web copy, and case studies were perennial staples. This was fine when people had time to read, but they don't anymore – rest assured that the 40-page white paper and spiral-bound case study are definitely dead.

The new case studies – sometimes called *success studies* - are tightly written, graphically appealing, logical, thorough, and to the point. There's no more droning on about vague benefits, no more gratuitous quotes. On the other hand, you can't convince anyone in three paragraphs. If you want your case studies to work, they have to be detailed and specific. This means somewhere between 1,000 and 1,500 words.

Good case studies will:

- Support branding by increasing awareness and credibility
- Get your prospects' attention
- Facilitate sales by overcoming objections

One unexpected benefit of creating case studies is that they tend to solidify relationships with the clients you feature. The interview process and final case study will remind them just how effective your solution is and form a strong, lasting psychological connection between your company and their success.

Here's how to go about creating great case studies.

## Designing a template

Since you'll probably be creating a case study for each product and service you offer, design a template complete with your company name and logo, standard heads and subheads, boxes for graphics (no more than one per page), and boilerplate with contact information at the end. This isn't just for your cost savings and convenience, the structure will also make it easier for clients to read more than one case study, and it will add to your branding consistency. To that end, consider the following template subheads

### About the Client
### Their Challenge
### Our Solution
### Their Success

You'll want your case studies to look clean – meaning a clear font and a balanced layout with lots of white space. When you're finished with the copy and graphics, the paper should have artistic appeal.  Everything should look open, symmetric, and the design should flow from one page to the next. If the case study is visually attractive and appears skim-able, people are much more likely to read the entire piece.

## Choosing the clients

Right now, you're probably mentally running through your list of clients trying to figure out which ones to approach. Your criteria for selection is probably limited to who you think would be willing to participate. The good news is nearly all of your clients will be more than happy to help – so don't use that criterion as a starting point.

Instead, working with your sales team, look through your database for clients who have successfully implemented the offerings you want to promote and who are similar to the clients you want to attract.

Favor big successes over big clients. Instead of choosing big name clients, look for clients who you believe can show measurable and undeniable success.

It's very unusual for case studies to include company names.  However, there is often enough information to identify the company without naming it. For example a case study might begin with, "The world's leading manufacturer of torsion springs for agricultural equipment…".

It's tempting to include the company name, especially if the client agrees and it's a Fortune 1000 company. But I would advise against it. Case studies do carry some risk of liability and its best to minimize it wherever possible.

Assure clients that they will be able to review and edit before the case study is finalized. Once they've approved it, get written permission to distribute it in print and online without limitation in the marketplace. This might involve some negotiation.

If you're in a business that needs to protect the privacy of its clients, don't let that stop you from creating case studies.  Instead, assure everyone you approach that you will not use the name of the company or its officials, or include any identifying factors. Then promise to let them review and edit.

## Researching

Many companies rely on salespeople to contact and interview clients for case studies. This almost *never* works for a number of reasons, which include:

- Salespeople resent the extra responsibility
- Salespeople worry about jeopardizing their relationships with clients
- Most salespeople are uncomfortable interviewing clients
- Most salespeople don't enjoy writing

Since portions of the case study will be about the salesperson, you're basically asking the salesperson to interview the client about his own performance – very uncomfortable.

No one likes doing something that they aren't trained to do. Creating case studies is a communications task. This means either someone on your communications staff or your public relations rep should be interviewing your clients and writing your case studies.

Given that, you'll *absolutely* want the input of your sales staff when choosing clients for case studies. No one knows about client successes better than they do.

In order to be respectful of your client's time, develop a list of standard interview questions that cover all the basics. Having a list will eliminate (or at least minimize) the number of times you need to call the client to follow up. Don't hesitate to ask additional questions that relate to the specific case.

Quantify any successes as much as you can. Ask for specifics and statistics – that's what readers will be looking for.

Assuming you're prepared – you've research the company, talked at length with the client's salesperson, and have a list of standard questions - you shouldn't need more than 30 minutes for the interview. Your last question should always be, "Is there anything else you want to add?"

Be sure to record the interview and transcribe it later. Otherwise, even if you're a great note taker, you'll miss important points. If it's a phone interview, start the recorder at the beginning of the call, and then ask the client if it's OK to record the conversation. That way, you'll have the response on tape.

It's true, transcribing the conversation will take extra time. But you'll find that because you have so much more material, you'll make up the time when you write the case study. You'll also be more confident about any quotes you use.

## Writing

Stick with one product/service and one success per case study. Don't make any unsupported claims. You must prove everything you say. Using the subheads suggested above, include the following information:

### About the Client

- What business is the company in?
- Specifically, what does it produce?
- How is it structured?
- Where is it located?
- How long has it been in business?
- How many employees?
- How long has it been a client?
- What's the current state of that industry?

### Their Challenge

- What was the situation like when you arrived?
- What challenges were they facing?
- What effect were those challenges having on their business?
- What solutions had they tried?
- Why didn't those solutions work?

### Our Solution

- How did you successfully address the client's challenges?
- Why did you suggest this particular solution?
- What were the specifics of the solution?
- What were the features of your offering that benefited the client most?
- Why did your product/service succeed when others failed?

### Their Success

- What did the client achieve because of your solution?
- What were the benefits?
- What was the return on investment?
- How did the solution improve operations?
- How does the solution continue to contain costs?

Figure about three pages and somewhere between 1,000 and 1,500 words. Any less and you're probably skimping on the convincing details: Any more and you're probably including unnecessary information.

It's OK to use your client's industry jargon. It sends the message that you know the industry well. You'll want to strike a balance between overly technical and overly simple. Your number one goal is accuracy, number two is providing proof, and number three is persuasiveness.

## Working it

Consider a finished case study as money in the bank. Use it as a 24/7 salesperson – if the prospect is wondering how your product works in the real world a good case study will convincingly explain it. Case studies are extremely versatile marketing tools with almost unlimited uses. Following are seven ideas to get you started.

## 1. Use them as sales tools.
Use them in presentations, to illustrate key points and to overcome common objections. For example, if prospects often have concerns about service, present a case study that features a client who had similar concerns and then received stellar service.

## 2. Use them online to generate leads and traffic.
You can offer your case studies in exchange for contact information on your Web site. Case studies will also increase traffic and possibly improve your search engine rank.

## 3. Send them to existing clients and prospects.
This is a good way to keep in touch and create interest in a new product or service. Case studies based on real-world applications are welcome additions to company newsletters and e-zines.

## 4. Use them for speeches.
If your executives speak at meetings and conferences, a case study makes an excellent presentation. The content can easily be converted into PowerPoint™. The printed case study itself can be used as a handout.

## 5. Pull quotes for references.
Pull isolated quotes from the case studies to use in other marketing materials. You may want to get your client's permission first.

## 6. Use them as tradeshow handouts.
Arm your salespeople with every case study you offer and have the case studies organized in files so that they can pull out the appropriate one at a moment's notice. Also, consider making a great case study into a display by blowing up the copy and adding eye-catching graphics. You can even have it printed on the back wall of the exhibit.

## 7. Include them in news releases.
You can add portions of case studies to news releases. Media people are always looking for examples of how real people use innovative products and services. In addition to product graphics, consider including a photo of the person quoted.

Well-written case studies stand out amid the clutter of marketing materials. Decision-makers will use them as references and cite you as a dependable, credible and trustworthy source of information - the type of company everyone wants to do business with. A case study involves considerable work and requires a variety of resources. But if you leverage it fully, the payback will significantly surpass your investment.

### About the Author
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