How to Write Outstanding Case Studies to Win Clients

Good case studies are a very powerful "soft-sell" business tool for promoting products or services, particularly in a B2B environment. Most case studies are short, only a couple of pages, and tell the story of how the customer benefitted from your client's product.

Done correctly, this is a great way of getting a potential customer onboard. They can see how someone else benefitted from the product or service. Instead of the client spouting about how good it is, you get someone else to do it for you. Some companies have case studies as downloadables on their websites, some like to capture an email address before download. Some email it to existing clients. A few only make them available when they are having a "new client" meeting — they give a hard copy of a case study very similar to what the client needs to convince them that they would be right for the client's project. Case studies have many uses.

It's not difficult to write a good case study. However it does need narrative skills, and in most cases, the imperative is to interview "the decision maker" in the customer's company, often the CEO or MD. Essentially you are telling a story — the customer, Universal Widgets, had a problem, they used the client's product, let's call it Total Software, to solve their problem/grow their business/increase their profits. On the way they had to surmount challenges, in the same way the hero has to do in classic narrative structure.

"Here at Universal Widgets, we installed Total Software and everything was hunky-dory," isn't an interesting story. Nobody would read it, or believe it. The world doesn't work that way, so the best case studies are candid about problems, while showing how eventually they were solved, making for a happy ending.

Unfortunately some businesses who commission case studies from me are a bit paranoid and make my life more difficult, firstly by often not letting me interview the end client — they might send me some Q & As they have done, which often is inferior to me using my interview skills to find out the nitty-gritty and get good quotes from the end-user. The other problem, is they want to edit out any problems, difficulties, obstacles surmounted, which as I suggested above, doesn't make for an interesting story, nor is particularly believable.

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This doesn't happen all the time, and the majority of clients are happy to let me do things my way – after all I have written about 200 case studies, so I think I know how to do them now.

They have a fairly standard format:

Headline

Total Software Helps Universal Widgets Grow by 15%

Sub-heading

Invoicing and CRM software from Total Software moved Universal Widgets into the leading company in their sector by completely automating its invoicing and reporting systems.

Introduction

Who, what, where, when and why – a mini overview of the whole story (keep it short). If someone doesn't read past this bit, they have still got the gist of the case study.

First section – The Background

Describe the challenge or problem the client was facing. Give the reader some background about the client, but not too much – Universal Widgets was formed in 1992 to sell widgets throughout the UK, but its turnover has remained static over the last few years because of outdated invoicing processes.

Second section – The Client

Describe the client – in this case Total Software, and what it does.

Third Section – The Solution

Describe what the solution was and how it was implemented, make this the core of the story, with obstacles and setbacks. Good quotes from the customer help.

Fourth Section – The Results

Describe the results – what did the business gain from using this product or process, in concrete language, e.g. turnover went up 15%.

It is normal to have a testimonial from the customer to round the Case Study out.

Call to Action

The final piece is a Call to Action. For example, "Call us for a free consultation." This is the only overt sales talk in the piece.

That's it really. Good case studies don't deviate much from this template – always the point of view is from the customer, Universal Widgets, and how it benefitted them, not the client (in this case Total Software). Unfortunately some businesses forget that and want just a puff piece. You have to make it realistic to be credible.

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