

# CASE STUDY DEVELOPMENT ESSENTIALS

*Quick-Start Guide*

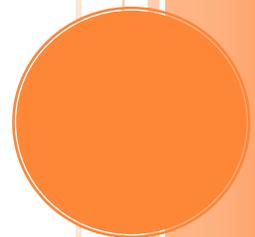
Establish authority, open the door to meetings, demonstrate your company's expertise and allow your customers to speak to your strengths. This quick case study development guide helps you launch case studies and avoid common mistakes.

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## GENERATE LEADS, SELL MORE

### *Case Studies Help Your Customers Help You*



A complete case study process is not just about writing – though that’s important. You need to qualify prospective interviewees, schedule interviews, ask open-ended questions that elicit interesting responses, record and transcribe the dialogue, and produce top-notch copy. The following guidelines help you get the process going and avoid some of the bumps in the road. If you need more pointers or insights, please call or email.

### **Establish Your Goals Early**

Your ultimate goal should to be increase sales or to improve market position. There are other critical case study development details, though. For example, you want to figure out whether the case study will be public or anonymous. Ask yourself, “Will this case study quote customers directly and involve specific details of the project?” If so, you need to connect with the company and determine if that’s possible. Some big companies (the ones you’d love to have in your case study library) often decline case studies because of the exposure involved. If that’s the case, you can get the details of their story and write generically. Either way, establish goals early to make sure things are feasible on both ends. Make sure you have a clear idea of the core concept that drove the project’s success, too. Was it service? Did some particular feature benefit the customer more than others? Was there juicy ROI?

**Establish feasibility. Identify the big idea. Was there juicy ROI?**

### **Define Pains, Challenges and Needs**

When a prospect is reading a case study downloaded from your site, one of the most important questions they ask themselves is: “Do I have a problem?” It’s the same question you should be answering on your company’s home

page. If someone can't immediately identify with a problem, challenge or need that fits their context, you have a potential bail-out situation on your hands (as in "back-click," close file, case study to trash can). Your case study questions should develop these challenges and pains with detailed, leading, open-ended questions. Call or email to get a good list. We're happy to share.

### **Uncover ROI Like a Dog Digging for a Bone**

ROI is your holy grail (or did I say bone?). Either way, if it's good, you'll probably use it in the title of your case study. Think time saved, money saved, resources reduced, efficiencies gained, increased productivity. The more detailed the better. Put it in terms of percentages. Make mountains out of molehills. If you can identify direct profits due to the improvement, that's a home run (or a big fat bone). There's one place where you want to be careful, though. Most customers don't want to go on record as having reduced staff or cut jobs due to some productivity enhancement. Be careful how you phrase this in the writing stage, because you'll have trouble getting the customer to sign off on it otherwise. We usually describe staff reductions in terms of "additional time for existing staff to concentrate on more pressing projects."

Most customers don't want to go on record as having reduced staff or cut jobs due to some productivity enhancement.

They didn't get laid off. They just don't have to chase busy work so much anymore. Get it?

### **Dig Deeper**

You'll find that much of the value your solution provides comes in a somewhat intangible form. Maybe the project leader got a huge slap on the back for the success of the undertaking. Perhaps the project elevated a team of individuals to a more esteemed position in the company. Heck, someone may have even been promoted. It's so important to *ask* about this stuff. Most people are pretty modest and refrain from bragging. It's your job to egg them on and get the details.

### **Extra Credit: Ask Them What they Learned from the Experience with the Product or Project**

These kinds of questions will help uncover even more details. Some good, some bad.. everything helpful to you and your company. Keep the good stuff for the write up. Let customer service know about the bad stuff – and fix it!