

Case Study Creation Toolkit



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Use My 9-Step Customer Case Study Creation Toolkit To Convert Prospects Into Eager-to-Buy Customers

Proof sells.

Potential customers and clients want proof your product or service works. If you can provide clear proof, prospects will line up to buy.

Customer case studies can offer that proof. But how do you avoid writing a case study that falls flat or staring at a blank computer screen wondering, “how the heck to I start?”

If you’re ready for a clear way to put together a case study that sells your product for you and delivers the proof your prospects need to buy, borrow my 9-step case study creation toolkit.

These 9-steps make creating engaging case studies a breeze.

Check it out:

9-Step Strategy To Write an Effective Case Study

1. Choose a customer for the case study. Select a customer who has a valuable story relevant to your marketing plan. Not all customer situations can become an interesting story that will resonate with your prospects.

Match the case study customer to your target market. To do its job, a customer story must speak to the audience.

2. Ask the customer to be part of the case study. Confirm the customer is willing to take part in an interview and share ROI metrics or other specific results.

If the customer is a larger business, also make sure your customer contact has the OK from the marketing or legal department to participate in a case study.

3. Schedule the interview and let the customer know what type of information you want. First-hand interviews and customer quotes help you create engaging stories. However, some questions require preparation on the part of the customer – not everyone can tell you ROI metrics on demand.
4. Prepare for and conduct the interview. Research the customer and prepare custom open-ended interview questions based on your research. But have the flexibility to deviate from your planned questions if the customer says something intriguing that's relevant.
5. Write the case study. Here's a summary of how to organize and write a case study:
 - Start in the middle and show the moment when the customer was in the most pain and decided to do something.
 - Summarize the problem, challenge, or opportunity.
 - Describe the customer.
 - Outline the problem, solution, and results. Be specific. Use real numbers and other relevant information.
 - Transition to the end.
 - End with a flourish: Look ahead to a happy, problem-free future for the customer. A customer quote often works great here.

6. Include a call-to-action that leads your prospect to the next logical step in the buying process.
7. Have the case study reviewed by the appropriate people and revise as needed.
8. Edit and tighten the writing. Then proofread, proofread, proofread.
9. Let a designer put the case study into a nice layout that fits your business branding.

5 Extra Tips

Some prospects will read a case study in detail, while others skim. To reach both types of readers, follow these five tips:

1. Include the top idea you want to emphasize in the case study headline.
2. Use subheadings throughout the case study to make it easy to read and follow.
3. Keep your sentences and paragraphs short.
4. Use images, tables, charts, callout quotes, or other visuals as appropriate to highlight your product/service and showcase how the customer uses it.
5. Summarize the key points in a sidebar.

What Next?

Writing a customer success case study sounds like a great idea. But it's no small undertaking. Sometimes, an outside writer is a better choice than investing your time.

I can help. Here's what I do when I write a case study for you:

- Research your company, your product/service, and the competition's product/service. This research informs my interview questions and adds concrete details to the case study.
- Interview you and your case study customer separately by phone.
- Write up a case study in a conversational style readers will enjoy.
- Revise the case study until you're thrilled with it.

Contact me to discuss your needs:

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