



# greenborough

**Creating a Case Study**



**2018**

## Why should you provide case studies?

Sometimes, as a business, you struggle to earn the trust of potential new clients.

Before you can expect them to engage with your business, you need to start the sales process by demonstrating your ability to deliver on what your product or service promises.

Of course, you could tell them that you're great at what you do, and that you're light-years ahead of the competition, but at the end of that day, that's just lip service. What you really need to win new business is cold, hard proof.

**One of the best ways to prove your worth is through the creation of compelling case studies that evidence the positive impact your product or service has had on one of your existing customers.**

In order to provide your sales team with truly valuable case studies, you need to have a definitive plan for selecting the most qualified candidates. Here's what you should look for in a potential case study candidate:

## HOW TO FIND THE RIGHT CASE STUDY CANDIDATE

**Product Knowledge:** The more well-versed a customer is in the logistics of your product or service the better. This will help to ensure that they can speak about the value of what you offer in a way that makes sense for future customers.

**Exemplary Results:** The companies that have seen the best results are going to make the strongest case studies. Not to mention, if you've gone over and above for them, it is likely that they'll have the enthusiasm you're looking for to provide a striking case study.

**Unexpected Success:** Non-traditional customers that have seen positive results can help absolve any doubts potential customers may have.

**Recognisable Names:** While small companies can have powerful stories, bigger or more notable brands can help increase credibility.



**Switchers:** Customers that came to you after working with a competitor help highlight your competitive advantage and sway decisions in your favour.

### **How do you ensure you're asking the right questions?**

When it is time to execute on the questionnaire and actual interview, you want to be sure that you're setting yourself up for success. To develop the strongest case study, it is important to ensure the questions you ask are relevant and provide the opportunity to expand. Here are a few sample questions to get you started:

What are your goals?

What challenges were you experiencing prior to purchasing our product or service?

What made our product or service stand out against our competitors?

What did your decision-making process look like?

How have you benefited from using our product or service? (Ask for specific numbers if applicable.)

Keep in mind that the questionnaire is designed to help you ask strong, success-focused questions during the actual interview. As for the phone interview, we recommend that you follow the "Golden Rule of Interviewing."

What this actually means is very simple – just ask open-ended questions. If you're looking to craft a compelling story, yes or no answers are going to get you nowhere. It is critical to maintain a focus on questions that invite elaboration such as "can you describe ..." or "tell me about ..."

**In terms of a structure for the interview, we recommend breaking down the process into six specific sections - The Customer's Business, The Need for a Solution, The Decision Process, The Implementation, The Solution in Action, and The Results. These focus areas allow us to gather enough information to put together a rich, comprehensive study.**

**The Customer's Business:** The goal of this section is to generate a better understanding of the company's current challenges and goals, and how they fit into the landscape of their industry.

**Sample questions: How long have you been in business? How many employees do you have? What are some of the objectives of your department at this time?**

**The Need for a Solution:** In order to tell a compelling story, you need context. This helps match the customer's need with your solution

**Sample questions: What challenges and objectives led you to look for a solution? What would have happened if you did not identify a solution? Did you explore other solutions prior to this that did not work out? If so, what happened?**

**The Decision Process:** Exploring how the customer arrived at their decision to work with you helps to guide the decision-making process of potential customers.

**Sample questions: How did you hear about our product or service? Who was involved in the selection process? What was most important to you when evaluating your options?**

**The Implementation:** Your focus should be on exploring their experience during the on boarding process.

**Sample questions: How long did it take to get up and running? Did that meet your expectations? Who was involved in the process?**

**The Solution in Action:** The goal of this section is to better understand how the customer is using your product or service.

**Sample questions: Is there a particular aspect of the product or service that you rely on most? Who is using the product or service?**

**The Results:** This is where you want to uncover impressive measurable outcomes. The more numbers, the better.

When it comes time to take all of the information you've collected and actually turn it into something, it is easy to feel overwhelmed.

Where should you start? What should you include? What's the best way to structure it?

To help you get a handle on the layout, we recommend focusing on building out the following seven sections:

**TITLE** Keep it short. Focus on highlighting the most compelling accomplishment.

This should be a two to four sentence summary of the entire story. You'll want to follow it with two or three bullet points that display metrics showcasing success.

**EXECUTIVE  
SUMMARY**

## ABOUT

This serves as an introduction to the person or company and can be pulled from their LinkedIn profile or website.

This section should include two to three paragraphs describing the customer's challenges prior to using your product or service, as well as the goals that they set out to achieve.

## CHALLENGES

## ASSISTANCE

This section should include two or three paragraphs that focus on describing how your product or service provided a solution to their problem.

This section should include two or three paragraphs that prove how your product or service specifically impacted the person or company and helped them achieve their goals. Include numbers to quantify your contributions.

## RESULTS

## VISUALS AND QUOTES

Pick one or two powerful quotes that you would feature at the bottom of sections above, as well as a visual that supports the story you are telling.

The following four points are elements you do not want to include within your case study:

**A beginning that talks at length about your customer's business.** If you want to add information about their company, turnover or premises etc, include this in boxes at the side of your case study.

**The Challenge and solution - but without the results.** Proof is the name of the game and without results you have proved absolutely nothing.

**Dull narrative:** Long words, complex sentences, excessive jargon, and an awkward flow create a boring case study. If no-one wants to read it, how can you prove yourself to them? More and more people out there are taking an increasingly cynical view of "marketing speak".

**No quotes:** Your customer's voice is essential. They need to speak to your reader and tell them precisely what you did for them and the results they have seen as a result. Unsubstantiated claims are boring and can be damaging to your business.

People love to read about other people and their experiences, which is why case studies provide the perfect vehicle for a friendly and non-sales pitch look at your business.

**IDENTIFY**  
**CONTACT**  
**QUESTIONNAIRE**  
**INTERVIEW**  
**WRITE UP**  
**FINAL SIGN OFF & IMAGES**  
**PUBLICATION**

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