



## Overview

Case studies (*customer success stories*) represent what good marketing is all about. They prove that you understand customer requirements and allow you to communicate your company's product, service or solution benefits to an already receptive readership.

As an integral part of a communication strategy, case studies support the sales effort, demonstrate credibility in specific market sectors and deliver critical information directly into the hands of prospects and customers.

They represent the real-world proof points for your product, service or solution, confirming its value and spotlighting its benefits.

One of my case study clients, the marketing manager of a pan-European venture capital company confirmed this and added: "Case studies are an integral part of our EMEA marketing programme and are used extensively by the sales force and throughout our marketing operation."

Case studies can be produced and used in several formats:

**Printed** – left in reception for visiting customers and prospects to read, handed out at live events such as conferences, exhibitions and seminars – or passed directly to interested prospects in a face-to-face sales situation.

**Electronically** – emailed in HTML format to respondents, prospects, customers, opinion-formers and the media.

**Online** – as a discrete page or section of your website and publicised via email, press advertising and/or any other medium employed by the company.

My financial institution client concurred: "Our case studies are accessible on our website where they are promoted heavily via all our marketing activity as well as distributed in printed form at our live events and in face-to-face sales situations."

The point is, it's not enough to have a case study programme in place if they languish in the PR manager's inbox or stationery cupboard.

**Case studies SHOULD BE USED! In every way possible.**

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## What's in it for the case study reader?

Your case study shouldn't preach, lecture or confuse the reader with science, technology or endless acronyms.

One of my clients, an EMEA marketing director for a big player in the communications sector, admitted that they have to resist the urge to get too technical.

*“Companies selling a technology solution such as ours run the risk of delving too deeply into the underlying technology and bragging about it to show expert knowledge when the customer really isn't that interested beyond obvious compatibility issues,” she said.*

She's right. The same applies to many industry sectors. The most obvious include all IT and other business-to-business (B2B) companies as well as companies in the automotive, aviation, pharmaceutical, food and financial/banking sectors. For instance, you never see British Airways describing the complex array of computer systems and jet-propulsion technologies that enables their aircraft to get you to Madeira in 3.5 hours.

*My client continued: “If our case studies are to have any marketing and sales value, they need to demonstrate that we understand the issues and challenges confronting our customers' market sectors and are capable of providing solutions that deliver genuine, real-world benefits.”*

For my client, that means making an effort to focus on the benefits the potential customer will receive. The obvious way to do this would be to employ a dispassionate, intelligent outsider (such as a your favourite, experienced, freelance copywriter) to look at the case study from the target readership's perspective.

## Case studies should talk to the reader

It is critical that your case study 'talks' to the reader. So, get 'voices' into them wherever possible. Ideally, quote someone from your company as well as someone from the customer side.

**On the customer side**, make sure they are as senior as possible. This should specifically be someone who was involved in the tendering and purchasing process – and the implementation/installation if relevant.

**Your featured company 'voice'** should be the product expert (usually sales or techie) who can talk about the attributes and benefits of your product, service or solution.

Quoting end-users (and internal experts) adds credibility to the information provided by the rest of the case study and confirms real-life experiences.

*“If we are writing about an end-user of one of our products, it makes no sense not to include their words as an integral part of the story,” said one of my specialist software solutions marketing manager. “We talk to them to get details about their usage of our products, so quoting them in the article is essential to establishing credibility.”*

A case study should have a steady flow of 'conversation' from the customer and/or your expert throughout. They should be included every 2-4 paragraphs to confirm or add to what the previous paragraphs have stated.

Quotations also break up the factual content, and makes the case study much, much more personable and readable.

## About sub-headings

Sub-headlines are an important part of your case study communication and should be used throughout. They not only break up the copy for easier mental digestion by time-starved executives, but also serve as quick reference point to specific subject matter within the copy.

### Keep them short

Sub-heads should only be 4-6 words long at the most, but be mindful of the type size and column width used in the chosen format.

I believe that narrow columns in a case study shouldn't have two-line sub-heads. In this situation, use 1-2 word sub-heads that don't run over to two lines, such as simply: **'The solution'**, **'The benefits'**, **'The usage'**.

### Easier to write

It is also easier to write each section of the case study when you are guided by the subject of each sub-head.

**By the way, headlines and sub-headlines should not end with full-stops. Question marks at the end are OK, as are commas and colons within the statement.**

### Clear communication

Also, resist Initial Capitals Unless You Have An American Readership Or Have American Corporate Guidelines And You Don't Have A Choice.

*(Research has long since proved that initial caps confuse and reduce readership. This was proven and established as good practice by the pioneering UK-born, American advertising practitioner and researcher, David Ogilvy, back in the 1950s.)*

## Should you use photos?

Yes. Include photos where possible, where space allows and where relevant.

A photo of the person quoted will further enhance the credibility of the case study (particularly if that person is recognised or known within your industry) in the same way that their actual quotations achieve the same.



Another photo of your product, service or solution in action or in use (if possible) is always good and helps to identify with the target readership.

Failing both these, try for a library stock photo of something that simply demonstrates the industry sector the case study is involved in – a photo of any jet plane for an airline customer, a photo of a town/city centre will do if it is a government department or local



authority customer – and a photo of computer circuit boards and cables for an IT customer. Corny, but effective.

## How long should a case study be?

How long is a piece of string? The length of a case study depends on its usage and the medium it is delivered in.

A good size for a case study that is printed and passed on by hand is double-sided A4. This, in my experience, has a maximum of 850 words and is the most widely-used format.

### Optimum length

However, a more complex case study may require more wordage – not to mention more supporting photos and diagrams. (remembering that a case study is NOT a white paper – so think hard before you include any complex, 'technical-looking' diagrams). In which case, employ a four-page A4 printed format of no more than 1200 words. The 'front cover' is often not used in a 4-pager, so you have only three usable pages for text.

If converting to PDF for your website, try to keep it under four pages as this reduces the need to scroll down, and down, and down. Boring!

### Short versions

Often, however, a case study is used for the press and, while it can be initially written as a full length case study for sales support situations, it should nevertheless be edited to an executive overview of no more than 250-350 words max with quotes. You can always supply the full length case study if requested by the publication editor.

Shorter versions of case studies are also ideal on the 'Customer Success Stories' page of your website where you can show a list of several case studies with a two-line statement about what was achieved by the customer. In this situation, you can always have a click-through link to the full-blown version.

### 2-line summaries

The same is true for case studies featured in any digital newsletter where a two-line summary is required to get across the main messages – and a click-through link to the full version.

## Corporate guidelines

Many companies, especially the larger, multi-national corporations, have centrally controlled corporate guidelines for all marketing collateral produced everywhere in the world. This usually includes case studies.

Corporate guidelines dictate size, format, subject structure, information content, length and typeface and size. Which is why it is important to know and understand these when writing a case study or briefing a copywriter.

### It's all about consistency

Corporate guidelines will sometimes override some of the advice presented here. That's not to say that corporate guidelines are wrong – or that this advice is wrong - it's just that corporate guidelines are concerned with a higher level of communication that ensures corporate consistency in design and messaging across the full range of corporate marketing collateral. This is so that all brochures, advertisements, websites etc etc, visually confirm that they are from the same company.

### Ensuring readability

Nevertheless, corporate guidelines can sometimes be quite unnecessarily restrictive to good communication by imposing seemingly arbitrary corporate rules, specifically with regard to content and structure, that may work for some stories but not others.

The result is a formulaic case study that lacks 'personality' and, therefore, readability.

**It's the writer's job to work within the guidelines and ensure this doesn't happen.**

## THE STRUCTURE AND CONTENT

### 1: Side panels

Many corporate case studies employ the use of a side panel on the first page as a quick *aid memoir* that lists the following subjects:

- Customer's industry sector
- Products used in the customer solution
- Usage
- Results or benefits gained



Agro industry

- ▶ Daily Use
  - Departmental meetings
  - Governance meetings
  - Internal training
  - Telemedicine
- ▶ Solution
  - Polycom® HDX® 4000 Personal Telepresence Solution
  - Polycom VVX® 1500 Business Media Phone
- ▶ Results and benefits
  - Significant reduction in travel costs
  - Greater efficiency at work
  - Improvement of employee welfare
  - Increase in services for employees

#### ▶ Polycom® visual conference SOMDIAA

For over 60 years, the SOMDIAA food-processing industry in Africa (tonnes of flour and 50,000 tonne plants spread throughout French Chad, and Reunion Island). The company posted a turnover of EUR 257 million in 2008.

SOMDIAA uses video conferencing for various purposes, mainly in three areas:

**Initially, a traditional use in Africa**  
In October 2008, at the very start of the year, it was quickly understood that video conferencing would be used to reduce costs. As the company's headquarters are in France, while the production site is in Chad, the travel budget was a major concern.

Furthermore, the sites are located in remote areas, making telecommunication or transmission of data at SOMDIAA was required to be of high quality on the low bandwidth available. Video conferencing systems could not be used.

Conducting departmental meetings was not the customary. The sales, production, and finance meetings had to be postponed or cancelled.

SOMDIAA is a group made up of several companies in central Africa; each Board of Directors meets in France for general management based in France. The associated costs were estimated at EUR 6000 per trip. Each Board member had to attend their meetings, which not only required a long flight (air as the average flying time was 12 hours (Reunion Island)).

## 2: The headline

I believe that any and all marketing communication should conform to the best precepts of an advertisement, ie: to attract, interest, inform and lead to an action. This is equally true of direct mail, a website page, a targeted letter or even a brochure.

In the same way, your case study should instantly grab attention and be relevant to the readership – at the same time as imparting the key point you are trying to communicate. This is why, as the primary level of communication, a headline is critical.

Over 80% of all readers who view your case study will remember the messaging of the headline – even if they don't go on to read further.

This is why it is important that case studies have a compelling, relevant, and informative headline that names the customer, describe the benefit(s) received and gains the reader's attention.

**For example:**

**NDS cuts costs, goes green and sees the bigger picture thanks to a company-wide Polycom telepresence solution**

### 3: 'Overview' sub-heading

eg: 'Overview' or 'Executive summary' or 'A problem solved'

The first few paragraphs (and their sub-headline – more of which later) of any marketing communication is the second most important level of communication after the headline. This is the best place to communicate an overview of your customer's situation, solution and benefits as succinctly as possible.

Here is an example of how this 'executive overview' introduction could be written:

*(Customer company) is leveraging the power of (your product) thanks to the ability to (name key functionality that delivers the benefit) in the three major markets of Europe Middle East & Africa (EMEA), AsiaPacific (APAC) and North America. (Your product) will improve and accelerate decision-making, ease collaboration between departments, reduce operating costs, and improve efficiency across distance.*

#### **4: 'The background' sub-heading**

eg: 'Background' or 'Not achieving full potential'

Because a case study should spotlight beneficial changes within a customer's operations, it is therefore necessary to explain what the company had (or didn't have!) in place previous to purchasing or implementing your product, service or solution.

This short overview of systems, procedures and problems prior to the arrival of your product, service or solution need only take a paragraph or two.

## 5: 'The requirement ' sub-heading

eg: 'Achieving rapid productivity and profitability gains'

The next information offered is to show how your customer identified the requirement as a result of not being happy with the existing situation and what drove them to seek a solution.

You can describe the tendering process here if relevant. For instance, were other competitor companies reviewed? If so, and if you think it enhances the credibility of your product, mention competitor companies (especially if they are 'bigger' or perceived as industry leaders) but only list them, NEVER describe them in a derogatory manner.

### Reasons for your customer company to seek a solution could be:

- to save money
- to save (travel?) time
- to increase productivity
- to increase profitability
- to increase customer satisfaction
- to increase business agility
- to reduce carbon footprint and underpin or establish the company's 'green' credentials

Demonstrating that your company was the winner in a tender and review process (whether you mention competitors by name or not) enables you to state WHY your product, service or solution stood out. Mention that you were chosen over the others because the customer thought you offered better service, that your product is easier to use, is cheaper ('more economical'), is better supported or is more functional.

### A typical sentence could read:

*'After a careful review of the features and functionality of the solutions offered by the various companies in a competitive tender, (your customer) decided that the xxxxxxx solution offered by (your company) was more comprehensive and delivered the productivity benefits they sought.'*

## **6: 'The product, service or solution' sub-heading**

eg: '(Product name) meets expectations' or '(Product name) wins out'

Now is the place to describe the product, service or solution chosen by your customer.

Briefly mention functionality in terms of the features it was chosen for.

Describe the implementation, installation or adoption by your customer's staff.

## 7: 'Usage and benefits' sub-heading

eg: 'The benefits' or 'Achieving rapid productivity and profitability gains' or '(Your product/company name) saves money'

This is what the case study is all about. The part that will make your company's product, service or solution look good. Describe who is using your product, service or solution within the customer organisation, how and what benefits they are receiving. You should differentiate the different users to demonstrate the company-wide benefits achievable.

Do the financial people use it? How about customer-facing personnel? And how do the sales people use, and benefit from, your product? Spell it out.

Hark back to what the customer was seeking in the first place to demonstrate how your customer has achieved as many of its objectives as possible:

- to save money – how is it doing this with your product, service or solution?
- to save (travel?) time – how is it doing this with your product, service or solution?
- to increase productivity – how is it doing this with your product, service or solution?
- to increase profitability – how is it doing this with your product, service or solution?
- to increase customer satisfaction – how is it doing this with your product, service or solution?
- to increase business agility – how is it doing this with your product, service or solution?
- to reduce carbon footprint and underpin the company's 'green' credentials – how is it doing this with your product, service or solution?

Because this section contains the most words, you should add a sub-headline after every 3-4 paragraphs throughout the section to help break it up. These should obviously relate to the content of each section.

**As a little 'cheat' to make it easier to write these, simply identify a relevant three-word phrase from within your text and repeat it as the sub-headline for that section.**

### **8: 'Future plans' sub-heading**

eg: 'Achieving rapid productivity and profitability gains'

Always wrap up by providing anecdotal or actual intent by your customer for further usage or extended future purchases of your product. This serves as an endorsement of your product's efficacy.

It is virtually mandatory to include a quote here by your customer of their satisfaction with your company and their confirmation that they will be investing further in your products in the future.

This need only be two sentences, including the quote.

**That's it. Case study written. Now use it.**

## 9: Summary

Here's a summary of the sub-headline sections to aid writing. Simply write the relevant number of paragraphs under each heading and you are virtually done.

- **The headline**
- **Overview** – 3 paragraphs – max 150 words
- **The background** – 2-3 paragraphs – max 150 words
- **The requirement** – 1 paragraphs – max 75 words
- **Usage and benefits** – 2 paragraphs – max 400 words
- **Future plans** – 2 paragraphs – max 75 words

Now send it to your favourite experienced freelance copywriter to ensure the tone of voice is right for the readership, to check for any literals, inconsistencies, typos etc and to make it 'flow' correctly. In other words, to generally polish it ready for publication.

- end -