



Compelling  
Writing Case Studies  
*by Andrea Sittig-Rolf*

Do you have happy customers? You know, the ones who are loyal, think you're the greatest and continue to buy from you time and time again? Why not leverage the relationships with these customers to gain new customers and further develop your business? Detailed accounts of your most satisfied clients are your best selling tool. When others have something positive to say about you and the products or services you provide, it establishes credibility with prospects who are considering buying what you sell. The case studies you write should be results-oriented so they address what buyers care about most when considering a purchase - results. First, I will present the outline to follow when writing a compelling case study, then I will share an example.

<b>Client:</b>	Name of the client for this case study.
<b>Challenge:</b>	State the challenge that faced your client before you worked with them.
<b>Solution:</b>	Describe the solution you provided.
<b>Result:</b>	Describe the result based on the solution you provided.
<b>Testimonial:</b>	Include a quote from the client describing the result you provided.

For example, let's say you sell for ABC Video Conferencing Services, and you have provided a solution with a favourable result to your customer, XYZ Co. The case-study might look something like this:

<b>Customer:</b>	XYZ Co.
<b>Challenge:</b>	XYZ has executives located in multiple locations across the country who need to meet on a regular basis. Travel has become costly and time-consuming, yet the visual contact is an important factor in conducting their executive meetings.
<b>Solution:</b>	ABC Video Conferencing Services provided a video-conferencing solution to allow XYZ executives to meet on a regular basis, from the comfort and convenience of each executive's own office, while still allowing the visual contact necessary for viewing of the other executives, as well as charts, graphs and other visual aids.
<b>Result:</b>	XYZ has reduced its travel expenses by 18% while still allowing executives to effectively communicate, virtually face-to-face.
<b>Testimonial:</b>	"While ABC Video Conferencing Services provided excellent customer service and technical support, more importantly our executives have become more efficient in their face-to-face communication, and the money we saved on travel expenses has been applied, as profit, directly to our bottom line. Thank you, ABC Video Conferencing Service Co." -- Joe Customer, President, XYZ Co.

Don't be afraid to ask for testimonials. When you've done a good job working with a client, ask for their permission to either include them as a case study in your case study portfolio, or to give a testimonial regarding the work you've done. Often, clients are more agreeable if you make it as easy for them as possible.

For example, you should be the one to write the case study or testimonial and just ask your client to give you his permission to use it. Not only does this save your client time, it allows you to convey the message you want to convey and to best profile the work you've done

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for that particular client. It also guarantees a faster turn-around of the case study since you're not waiting on your customer to finish it.

If you have a storefront or office where clients and prospects visit frequently, framing actual testimonial letters on client letterhead with the client's signature can be a very effective way to get your message across and gain instant credibility with your prospects. If you do not have a storefront or office where clients and prospects visit frequently, it is also just as effective to use case studies as a part of your website in a "case studies" category, or within a presentation such as PowerPoint, or in other marketing materials such as brochures or direct mail pieces. Case studies are the most cost-effective sales tool there is, and if nothing else, you can print them on company letterhead to share with prospects.



Case studies are also wonderful for overcoming objections. For example, when you hear the objection, "I'm not interested," you can refer to a case study of a client with a similar objection who has since used your products or services with great results.

It is a good idea to categorize case studies by industry, company size and application of your products or services. When prospecting, you can then refer to the case study that best fits the prospect you are working with. So, for example, if you are working with a small, telecommunications company who will use your widget to make their billing process more efficient, share with them a case study that

profiles a small, telecommunications company who used your widget to make their billing process more efficient. This becomes extremely valuable to your prospect by giving him confidence that you can produce the results he desires.

I have 24 case studies, each profiling a different offering, for different sized companies, in a variety of industries, who used my services in a specific way to help them increase their sales and make their salespeople more effective. By writing a compelling case study for each happy client, I have created a virtual library of case studies - an invaluable resource used to continue to grow my customer base.

Case studies should be used throughout the sales process from introducing your products or services to including them in proposals, overcoming objections and finally asking for the order. Because case studies highlight the results your company has been able to create for your customers, they keep your results top-of-mind with your prospects. I can almost guarantee that your competitors are not doing this, so all other things being equal, you will gain the competitive advantage by providing something for your prospects that your competitors do not!

A great way to gain the information you'll need for your case studies is to provide an evaluation form to each client upon completion of their project. Be sure to ask open-ended questions in your evaluations so that your clients are giving you the details of their experience in their own words. This is also your opportunity to ask for referrals so be sure to include a question in your evaluation that asks for referrals.

The evaluation you provide will actually accomplish a couple of different things. First, it will show your new client that their feedback is important to you and that you value their opinion and their business. Then, it will give you the information you need for your case study regarding their particular project. Finally, it will give you the opportunity to become a hero and fix anything that went wrong during the process of working with your client.

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