

The Ultimate Case Study

by Alan Radding

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How to create compelling customer
testimonials

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Introduction: The Ultimate Sales Tool

Case studies, user stories, customer stories, testimonials, or whatever you call them represent one of the most powerful sales tools you have. Through the case study, prospective customers can identify and relate to the experience of others who have (presumably) paid money for your product or service and received the promised benefit in return.

The case study provides prospective customers not only with the reassurance that your product or service delivers what you promise but also with a model for how the customer can best take advantage of your product. Although case studies often are associated with technology products and services--hardware, software, telecommunications--they are essential when selling any complex product or service, whether business-to-business or consumer. Financial services, medical products, even vacation travel services can benefit from credible case studies.

This brief guide will steer you through the process of developing compelling case studies that will help sell your product or service. It will explain:

- What makes an effective case study
- How to take advantage of the case study
- How to gain customer cooperation and approval
- How to structure the content

It also will provide a template that you are welcome to use when developing your own case studies.

Credibility is the Key

If your case study isn't believable--credible--it won't do a thing for you. The power of case studies comes from their believability. Yet many case studies undercut the very credibility they should be enhancing.

How does a case study undercut its credibility? It can be vague about key details. It can have gaps, skipping critical parts of the story. Probably the biggest killer of credibility,

however, is the effort to turn the customer into a salesman for the product. This happens when the writer presents the customer reciting hype that sounds like it came straight out of a marketing brochure.

The desire to present your customer saying wonderful things and only wonderful things without restraint is natural. But even if your customer actually does walk around sounding like a paid ad for your product, cool it in the case study. This is especially applicable in business-to-business case studies, where the buyers are assumed to be professionals and that kind of unreserved enthusiasm will ring false.

Instead, when I write case studies, I go out of my way to make the customer sound utterly believable. And I do so in the following ways:

- **Put the story into a realistic context**--set the scene, the industry and company background, establish the timeframe in which the story is occurring (although I try to avoid dating the story with a firm date).
- **Have your customer talk intelligently**--give him or her substantive things to say about the product or service and the process. Don't let the customers gush or be overly effusive. The last thing you want is a customer who sounds like a rookie salesman.
- **Be frank about problems or difficulties**--readers know that products aren't perfect and the experience with a product or service won't be flawless. Without dwelling on them, acknowledge difficulties that were addressed and resolved to the customer's delight. This alone will greatly boost the credibility of your case study while portraying your company as an organization that is responsive in pursuit of customer satisfaction.
- **Back up assertions and generalizations with specifics**--rather than say a product was good, describe what was good about it. Rather than say a product installed easily, describe the installation and show how little time and effort it required. Details build the credibility of your case study.

In general, make your customer sound like someone whose judgement and perspective you can respect.

Leveraging the Customer Testimonial

Developing a case study is only part of the process. What you do with it once it is written is something else. Of course, what everyone would love is for the Wall Street Journal or

The New York Times to publish it verbatim. This is not likely to happen ever. And even if it magically did happen, it would not turn out to be the transcendent business event that you might imagine. There are, however, things you can do to increase the value you get from your case study and to continue to collect that value over a longer term.

You can leverage your customer case study in five basic ways:

- **Opportunity to get close to the customer**--the concept of the customer, customer focus, customer relationship management, getting close to the customer, has become the mantra among managers. Working with your customer on a case study that makes the customer appear smart gets you about as close to the customer as you can be. And it is pretty hard for a customer who has preserved your case study under Lucite and proudly hangs it on the wall to switch vendors.
- **Sales collateral**--the classic use of a case study. Here the sales force provides appropriate case studies along with other sales and marketing collateral to prospective customers during the sales process. As noted at the start, the case study is one of the most powerful sales tools you have.
- **Web site content**--case studies make great Web site content, essentially electronic sales collateral. Some companies even go so far as to link the case study on their Web site to the customer's Web site. (This is something I try to discourage--why send your Web site visitors to someone else's Web site. Instead, provide everything your readers need to know about the customer right in your case study.).
- **Press coverage**--some publications (not the New York Times or the Wall Street Journal) will publish case studies, usually under the customer's byline. More often, the publication will use your case study as the starting point to write its own story about the customer, the product, or some trend reflected in the product or the customer.
- **References for analysts and reviewers**--again, like the publications, analysts and reviewers won't publish or distribute your case study, but they will use it as a reality check. The case study becomes a vehicle to validate your claims for the product.

Gaining Customer Cooperation

The hardest part of developing a customer case study is gaining the customer's cooperation. The problem isn't the amount of work the customer has to do in the actual development of the case study. That work is negligible--a phone interview with the writer and a little time reviewing the document and identifying the revisions he or she wants. None of this entails heavy lifting on the customer's part.

The two real obstacles are relationship and policy. Although you want to use the case study to bring you closer to the customer, the customer may not want to get that close to you, may not want that deep a relationship. The policy obstacle usually revolves around the customer's organization either not wanting to appear to endorse a product or having strict controls over who gets outside exposure, when, and where.

These obstacles can be overcome. Start by reassuring the customer that nothing happens with the document until you have made any revisions he requests and he approves them. You can address the product endorsement concern by explaining how the case study is only going to detail what the customer did--the facts--in the customer's terms. You can promise that you will not turn the customer into a salesman for your product because the customer wouldn't approve such a case study anyway. You can also acknowledge that participation in the case study does not mean the customer automatically will remain a customer for life (although, of course, you hope that will happen). Then, emphasize your ongoing commitment to the customer's satisfaction as the basis for future business.

But more important, you need to shift the discussion to the worthwhile reasons the customer would want to participate in this case study. There are things in it for the customer too. These include:

- **An easy, cheap way to bestow recognition on its people**--the case study will portray those who were involved in the purchase and implementation of your product or service as smart. The case study becomes a valuable form of recognition that doesn't cost the customer a penny.
- **A way for the organization itself to appear smart**--in the same way as described above, the case study will portray the organization as smart, effective, efficient, and leading edge. It sets up the participating customer as a leader in its industry.
- **Protection of its investment in your products**--since the customer has purchased your product or service, it has a stake in your success, especially if it wants you to be around to support the product over the long term. The case study will help ensure your future success.
- **Extra attention resulting from its your relationship**--by participating in a case study you and your customer develop a closer, special relationship with all the extras that may entail in terms of responsiveness on your part.

Which customer should you choose for a case study? Although some managers fret over this question, the answer is simple: any satisfied customer will do. Certainly it is nice to showcase a widely recognized and respected industry leader, but not every prospective customer can identify with an industry leader. What you really need is a set of case studies covering the full spectrum of customers. Your sales people can then present the

most appropriate case study for each prospective customer. Some will be wowed by an industry leader, others will relate better to a smaller company.

Once you have enlisted a customer's cooperation and developed the case study, the approval process itself is straightforward. First, make sure internally that the text says what you want. Then pass it to the customer for review and approval. The customer is likely to make some changes, correcting facts, altering quotes, even inserting some of its marketing messages into the text. You'll have to live with the changes as the price for gaining customer approval. But usually the changes are insignificant. In fact, the only time I encounter significant revisions is when the company developing the case study makes the customer a mouthpiece for its own product sales pitch, which the customer eliminates.

Developing the Content

Developing the actual content of the case study is an exercise in solid research, reporting, and writing. The trick is to develop a coherent narrative that will naturally bring out the points you want to emphasize. Wherever possible, I try to tie the narrative into current trends, issues, and ideas so the article is part of what people already are buzzing about in the industry, in business in general, or in society at large.

There are five basic styles in which the case study can be written:

- **Problem-solution**--by far the most common way to structure the case study. The narrative is simple: this customer was wrestling with a particular problem or challenge or opportunity, and this is how the product played a role in the solution. There are some variations within the basic problem-solution model, usually involving implementation or future directions. [See the Case Study Template provided below.]
- **Results first**--starts with results, especially when the results are unusual. Then you jump back to fill in the why and how.
- **Inverted pyramid**--comes straight from journalism. You proceed as if writing a detailed, journalistic news article with a compelling opening followed immediately by the most important information.
- **Anecdotal-feature**--also comes from journalism. Here the customer's story is fleshed out with frequent anecdotes.
- **First person account**--the customer is telling the story directly, in his or her voice. (Your writer will actually write the piece for the customer using the first-person voice.)

The actual writing style will most likely be third-person or journalistic (except for first-person accounts). In the third-person style, an unidentified narrator tells the story. This style is particularly appropriate when the case study includes a lot of technical or highly specialized detail.

The journalistic style is much like the third-person style except it includes direct customer quotes. The quotes give the case study more color and personality and create more emotional involvement. It requires that an individual at the customer organization willing to have quotes attributed to him or her by name.

The first-person voice provides great believability. However, it requires more effort on the part of the customer, who will probably spend more time with the writer and more time reviewing and revising the results. It also implies a deeper commitment to your product, which the customer may be reluctant to make.

After the text is developed, you can proceed with layout and design. If you are planning a set of case studies, you should standardize on a consistent design so readers will find the same kind of information in the same place. Beyond that, a photo of the customer can be included; if the customer is shown using the product, so much the better. Diagrams, charts, and graphs will help to clarify complex details. Sidebars (short accompanying text) provide additional detail or emphasize key points.

Case Study Template

The following template provides a basic problem-solution case study.

Case Study Component	Description
Headline	More than just a company name, give a sense of the main theme of the case
Subhead	Expand upon the headline or introduce a second major theme
Abstract	Summarize the case study in one paragraph (4-8 sentences)

Background	Establish the context of the story, the customer, the industry, the environment
Problem/Challenge/Opportunity	Describe the reason, situation, or events that led the customer to seek the product or service in the first place
Solution	Describe the solution in which the product or service played a role Describe the role it played, and how and why the customer came to choose the product
Results	Explain the results or benefits the customer experienced from the use of the product as specifically as possible
Conclusion	Add a kicker that pays off the headline/subhead or moves the story forward, such as by discussing future customer use of the product

The Case Study Process

Developing a case study combines solid journalistic research and reporting with an understanding of the business, marketing, and sales issues involved to make the case study an effective sales tool. Since this is your customer you are talking about, you really want a quality job that puts the customer as well as the product in the very best light.

Often an experienced outside writer like me is best positioned to handle the job, straddling the middle ground between the customer and you. From this vantage, the writer can blend the third-party journalistic perspective with knowledge of your business, marketing, and sales requirements. The outside writer is better able to ensure that the

customer comes off sounding like a savvy, credible buyer rather than as a company sales person--credibility that is essential to the success of the case study.

When I develop a case study, I typically follow these five steps:

1. Interview the people at the company who are closest to the customer and can relate the story from the company's perspective.
2. Review background material. Conduct industry, market, or customer research.
3. Interview the customer.
4. Write the draft.
5. Make any revisions necessary to secure customer approval.

Your company will want to shepherd the case study through the customer's approval process. Use this as an opportunity to further enhance the customer relationship.

From the standpoint of sales, there is nothing better than handing a prospective customer a compelling case study that documents how a similar customer solved a similar problem using your product. A credible case study, in such a situation, beats almost anything a salesman can say. That's why the sales force loves well-written case studies.

Although the case study is a powerful sales tool, it is just one of a set of effective tools for selling complex products. Other tools include the White Paper, Review's/Evaluator's Guide, ROI analysis, Sales Guide, effective Web content, and Business Presentations.

You are welcome to visit my Web site, www.technologywriter.com, to see samples of my writing, including customer case studies. While you are there, you may also want to check out my report titled *The White Paper White Paper*--required reading for anybody trying to communicate about complex products and services--and *The Ultimate Reviewer's/Evaluator's Guide*, an essential tool for those seeking to influence third-party reviews and customer evaluations.

And watch for my upcoming reports:

- *The Ultimate Web Content Guide*--how to create killer online content
- *The Ultimate ROI Guide*--how to communicate value
- *The Ultimate Sales Guide*--how to create a document that can actually drive sales
- *The Ultimate Business Presentation*--how to script a presentation that communicates effectively

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