

HOFFMAN MARKETING COMMUNICATIONS, INC.

## CASE STUDY OUTLINE

***Begin the  
case study  
in a  
compelling  
way.***

## CASE STUDY OUTLINE

---

*Steve Hoffman, President and CEO  
Hoffman Marketing Communications, Inc.*

---

Case studies (also called success stories) are a compelling, yet often neglected, form of marketing communication. While no single case study outline is applicable to all situations, senior writers at Hoffman Marketing Communications, Inc., have developed this outline as a starting template for development of business case studies. This case study outline incorporates key recommended strategies that Hoffman writers have identified during the process of providing a large number of these documents to clients over the last 20 years.

### ***Beginning the Document***

Begin the case study in a compelling way using a benefits-oriented title, a concise customer quotation, and a summary of benefits in bullet form. If possible, try to obtain photographs of actual customer personnel using the solution. While such shots are often difficult to obtain, they need not be professionally done; in fact, “homegrown” digital photos sometimes lead to surprisingly good results and often appear more genuine. Although the case study format, or the “look and feel” of document, varies from business to business, incorporating the following introductory elements can increase the effectiveness of the case study.

#### *Title*

- Emphasize the main benefit of the solution.
- Use action verbs such as “adopts,” “uses,” “aids,” “reduces,” “improves,” etc.
- Limit the title to 12 words or less.
- An example of a good title: “Company X reduces costs and improves customer satisfaction using Solution Z.”
- An example of a bad title: “An assessment of Solution Z at Company X.”

#### *Customer Quote*

- Include a concise, benefits-oriented customer quotation of 20 words or less.
- Phrase this quotation in a form that someone would actually say.

## ***Tell the story.***

- Request customer permission to assign the quote to a high-level executive at their organization, and include the executive's name, title, and company name under it.
- Focus on results, benefits, and overall customer satisfaction, rather than *what* was done or *how* it was done.
- An example of a good quote: "Company X's Solution Y improved our bottom line – we highly recommend them!"
- An example of a bad quote: "Company X assessed our situation, implemented their solution, and provided a range of follow-up services."

### ***Benefits Summary***

- Highlight the key qualitative and quantitative benefits in two or three concise bullets at the beginning of the document.

### ***Telling the Story***

The next step is to tell the story. In this portion of the case study, use interesting subheadings to serve as a roadmap for readers.

#### ***Challenge, Problem, Issue, or Opportunity***

- Begin by describing the *general* challenge, problem, issue, or opportunity that customers in this industry face. Devote only a few sentences to this general portion.
- Then, smoothly transition into a description of the *specific* challenge, problem, issue, or opportunity that the specific customer faces.
- Remember to spell out acronyms and define terms that readers may not understand.

#### ***Solution***

- Begin by describing the *specific* solution to the defined challenge, problem, issue, or opportunity that the specific customer faces.
- Then, smoothly transition into a description of the more *general* ways in which this solution can solve industry problems, resolve industry issues, respond to regulatory requirements, and/or take advantage of business opportunities.

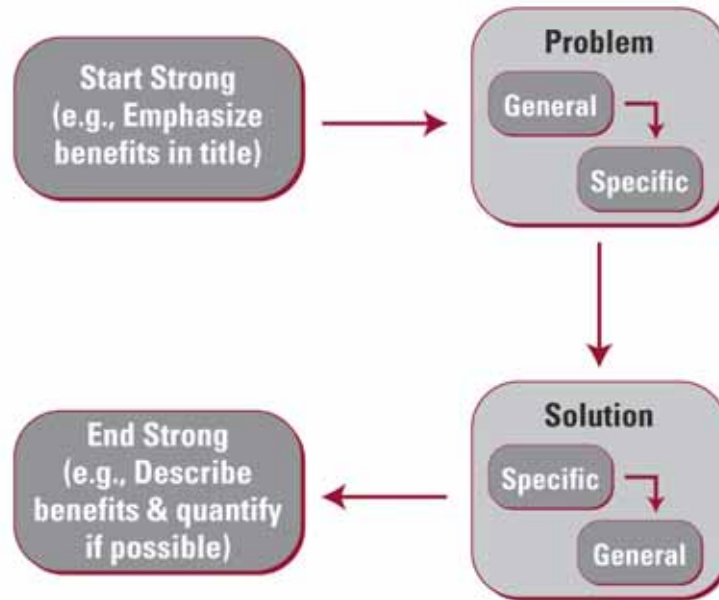
### ***Finishing Strong***

Finish strong with the benefits of the solution.

#### ***Benefits***

- Provide more information on the benefits of the solution. Be sure to map the benefits back to the topics discussed in the problem or challenge section. This "closes the loop" for the reader.

*Finish strong  
with more  
information  
on the benefits.*



### Key Portions of the Case Study Outline

#### *Additional Information*

- If the benefits are quantified, include a description of the assumptions and methods used to calculate them. Include a table or chart to explain these, if needed. Be sure to include the financial assumptions used. This enables readers to understand how the benefits were determined.
- Provide contact information, including a specific name (if feasible), phone number, email address, and Web site.

**About the author:** *Steve Hoffman is President and CEO of Hoffman Marketing Communications, Inc. ([www.hoffmanmarcom.com](http://www.hoffmanmarcom.com)) – a firm that has written case studies for business clients for more than 20 years.*



**HOFFMAN**

MARKETING COMMUNICATIONS

*Strategic business and technology writing*

**322 Digital Drive**

**Morgan Hill, CA 95037**

**P: 408-778-5664 f: 408-778-5663**

**[Info@hoffmanmarcom.com](mailto:Info@hoffmanmarcom.com)**

**[www.hoffmanmarcom.com](http://www.hoffmanmarcom.com)**