

Case Studies

Eight Ways to Get them Done

By Steve Hoffman

Most enterprises realize the value of effective case studies (also known as success stories). As Mark Twain once said, "Few things are harder to put up with than the annoyance of a good example." Yet many product managers struggle with the task of actually developing them. This article describes eight proven techniques for successfully developing case studies.

How to convince the customer

In many enterprises, the number one factor that limits development of case studies is the customer. To help convince a customer to agree to sign their name to a case study, explain the benefits they will realize. For example, remind the customer that they can show the completed case study to their senior management or board of directors—demonstrating that they are innovative, solution-oriented, and focused on business benefits. Most customers strive to find positive developments to report to higher management. Case studies are one of these positive developments. Because of this benefit alone, many customers actually are pleased with the opportunity to document their use of an enterprise solution that solves a business problem.

Another way to help convince the customer is to summarize the approach that will be used to develop the case study. Emphasize the following aspects: 1) they will be able to review the document and change or remove any text before it is published, 2) they can change their mind and rescind permission to publish the story at any time prior to publication, 3) the process will not require a major time commitment on their part. Another compelling part of the approach occurs at the end of the process: Tell the customer that they will receive a pdf file, printed copies, and a framed hard copy of the final case study as a form of thanks. This framed copy, hanging on the wall of the customer's office, will become a symbol of the successful relationship between the customer and the solution provider. Over the years, colleagues, co-workers, visitors, and others will admire the achievement.

How to work with customers to ensure success

Customer involvement is much more than just the initial "ok" to proceed. Follow these tips to ensure a positive customer experience and help ensure successful completion of the case study:

- **Involve the customer throughout the process.** Involving the customer throughout the case study development process helps ensure customer cooperation and approval, and results in an improved case study. Obtain customer permission *before* writing the document, solicit input *during* the development, and secure approval *after* drafting the document.



- **Write all customer quotes for their review.** Rather than asking the customer to draft their quotes, writing them for their review usually results in more compelling material.
- **Request high-level customer involvement.** Early in the process, recommend that a high-level manager or executive sign their name to the document. Including such a name and title on the case study increases its credibility, and can benefit the manager as well, in the form of recognition for a job well done.

- **Use customer photos.** Ask the customer if they can provide photos of personnel, ideally using the solution. They need not be professionally done; in fact, "homegrown" digital photos sometimes lead to surprisingly good results and often appear more genuine. Photos further personalize the story and help form a connection to readers.

How to agree on a common organization

Agreeing on a common organization for the case studies—a format that is workable across all case studies to be developed—poses challenges. Using a consistent organization is highly recommended, but different product managers may suggest various approaches. Regardless of length, the time-tested, most effective organization for a case study follows the problem-solution-benefits flow. First, describe the business and/or technical problem or issue; next, describe the solution to this problem or resolution of this issue; finally, describe how the customer benefited from the particular solution. This natural story-telling sequence resonates with readers.

In most client engagements, a problem, challenge, or at least an unrealized opportunity exists; without one, the client probably would not have adopted the "solution." And of course, all successful client engagements or sales of products or solutions result in at least qualitative—and in many cases, quantitative—benefits.

Establishment of a document template is also recommended. A template serves as a roadmap for the case study process, and ensures that the document looks, feels, and reads consistently. Visually, the template helps build the brand; procedurally, it simplifies the actual writing. Before beginning work, define 4-6 specific elements (e.g. title, subtitle, quotation, problem, solution, benefits) to include in every case study, formalize those elements, and stick to them. →

How to get started

The most prominent parts of a case study (e.g. the title, subtitle, and benefits bullets) are often the most difficult parts to write (or get right). The best advice is to start with a bang. Use action verbs and emphasize benefits in the case study title and subtitle. Include a short (less than 20-word) customer quote in larger text. Then, summarize the key points of the case study in 2-3 succinct bullet points. The goal should be to tease the reader into wanting to read more.

How to quantify benefits

No single element in a case study is more compelling than the ability to tie quantitative benefits to the solution. For example, "Using Solution X saved Customer Y over \$ZZZ,ZZZ after just six months of implementation," or, "Thanks to Solution X, employees at Customer Y have realized a ZZ% increase in productivity as measured by standard performance indicators." Quantifying benefits can be challenging, but not impossible. The key is to present imaginative ideas to the customer for ways to quantify the benefits, and remain flexible during this discussion. If benefits cannot be quantified, attempt to develop a range of *qualitative* benefits; the latter can be quite compelling to readers as well.

How to handle highly tailored solutions

Even highly tailored solutions and services can be described in an effective case study. This can be accomplished by writing first about a more general problem in the industry, then transitioning to the specific problem that the customer faced. In fact, this approach is recommended for all case studies.

In the problem section, begin with a general discussion of the issue that faces the relevant industry. Then, describe the specific problem or issue that the customer faced. In the solution section, use the opposite sequence: describe how the solution solved this specific problem; then indicate how it can also help resolve this issue more broadly within the industry. Using this approach, beginning more generally draws the reader into the story. Then, offering a specific example demonstrates, in a concrete way, how the solution resolves a commonly faced issue. And concluding more generally allows the reader to understand how the solution can also address their problem.

How to find the time (and the right writer) to do it

A common logistical limitation is finding adequate staff time to make the case studies happen. And even with the best plan, a case study is doomed to failure if the case study writer lacks the exceptional writing skills, technical savvy, and marketing experience that these documents require. In many cases, a talented writer can mean the difference between an ineffective case study and one that provides the greatest benefit.

When marketing staff time is limited, many enterprises outsource case study writing. Some qualified case study writers can also interview the customer to gather information for the case study. Because case study writing is a discrete, highly outsourced task, consider hiring a professional to quickly develop effective case studies.

How to afford them

Enterprises usually can't afford *not* to develop case studies. Their competitors may be using the power of example effectively, thus gaining an advantage. Moreover, case studies are generally not expensive to write. Four two-page case studies cost about as much to write as an average-length white paper. Further, in some instances, a set of effective case studies can pay for themselves even if they only lead to a small number of sales.

Conclusion

Managing the process of developing a case study is not easy. On the other hand, well-planned, well-written case studies can provide prospects valuable descriptive insights that can impact their decision making. Rather than presenting a business-case scenario, case studies present real-world examples, and include important information on why a customer chose a product or service, how it was implemented or integrated into their business, and the results or benefits the customer obtained. For prospects needing verification that a vendor's solution can successfully address the types of business challenges they are faced with in their particular industry, case studies can provide them this proof.

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