WRITING MATTERS / DARIN PAINTER

6 surprising tips for better case studies

Let’s face it, many case studies are boring, slapped together or simply miss the mark. These tips might seem crazy, but they’ll help you showcase your value and win business from prospects.

1. **Act dumb.**
2. **Go to hell.**
3. **Quit thinking about yourself.**
4. **Be lazy.**
5. **End with the beginning.**
6. **Sincerely doubt the interest of others.**

Want Help?

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You have great business stories to tell.

After speaking with hundreds of industry pros over the last two decades, I can confidently say this truth applies to your entire team: You have great business stories to tell.

If you're coming off a crappy sales quarter, you have great business stories to tell. If you sell labels to plant nursery workers who stick them onto flats of pink begonias, and you assume no one wants to read about that, you have great business stories to tell. If you saved the day with a rush order, or improved a process with a small suggestion, or tied a promotional product to an event theme, you have great business stories to tell.

You Help Your Clients' Brands. What About Your Own?

You're not telling them enough.

I'm willing to bet your team consistently produces success-story gems — some are shiny and obvious, while some need to be unearthed and polished. Some of these gems are mentioned at team sales meetings, or they're buried in email inboxes. A print production idea that saved a client money. A last-minute customer request that put your warehouse team into quick action. A technology feature that continually makes life easier for users.

What have you done lately for current clients that future clients need to hear and understand?

Prospects care about their future.

Understandably, you're fighting against the forces of limited time, scarce self-marketing resources and long to-do lists. At the same time, your prospects are bombarded with messages. They're empowered to ignore you, armed with easy tools such as the delete key. They need a good reason to tune in, so you need a good way to cut through the clutter. They need to know you understand the nuances of their market and have solved similar challenges for others. How can you reach targets in a way that will earn their attention? And why should they care about your success?

Prospects Care About Their Future, Not Your Past

The right answer is they don't care about your success, at least not directly. They care about their own future success, and how your company can help to make it happen. Reminding yourself of the importance of this fact can help you make smarter decisions about what to show prospects in case studies.

Understanding that your audience needs to know "what's in it for them" should inform your choices about point of view, structure, length and design.

This article discusses those case study aspects and more. It outlines surprising steps that can turn your "invisible" expertise into tangible material to place into prospects' hands (and onto their screens). With the help of our editing and design team, we'll try to present these tips in a way that's clear and detailed, but also digestible and interesting — just like your case studies should be.

These Tips Aren't as Nuts as They Seem

On their face, these tips will seem foolish and crazy. But read on, because they'll help you win you more face time (and hopefully business) from prospects.

01

Act dumb.



“Don’t mentally put on a coat and tie at any point.”

Don’t assume you already know which client you’ll feature, and exactly why your company mattered to that client. Instead, gather your team and begin with an open mind.

The easiest way to bring a case study kickoff meeting to a silent, awkward halt is to ask, “So,what’s the subject of our case study? What’s it going to be about?” Instead, begin by asking:

- What do we know that’s of real value to our prospects and customers?
- Where are our areas of distinctive expertise right now?
- How can we show/demonstrate/illustrate our best ideas?
- Who do we know (internally or externally) that can provide the content/material for the case study?
- What lasting impression do we want to make on readers?

Your answers will lead you to the right client(s) to feature in your case study (or better, your eventual series of case studies).

Also, before you begin to write success stories, commit to not adopting an overly “smart” voice — the way your content sounds and feels to prospects based on word choice. Don’t mentally put on a coat and tie at any point. Corporate-speak (“creating synergy,” “establishing a true win-win,” “moving forward,” etc.) is just garbled nonsense that buries the value and impact of your stories.

Commit to clarity, simplicity and a voice that’s conversational yet professional. Case studies read best when they sound like a trusted colleague or thoughtful acquaintance is sharing experiences and insight.

02

Go to hell.



“Desire + risk = drama.”

Sustaining attention in a case study means creating dramatic tension. Conflict is important and is essential to the first part of the typical CHALLENGE > SOLUTION > RESULT structure of the case study. Encourage the case study source to describe the business problem in detail — the company’s issue and the source’s personal recollections and thoughts about the issue. Doing so might help the reader to relate to the problem you solved.

Remember this formula: Desire + risk = drama. Here’s how it works:

State the desire.

Why did the chicken cross the road? Because it wanted something on the other side — shade, food, a rooster, whatever. Desire is the engine that drives a story, the force that gives it momentum. For a case study to begin, someone has to want something (often, to overcome something). What objective, goal or dream did the customer have? What did its leaders want? Why did this goal matter?

Articulate the risk.

To create an effective story, it helps to articulate the challenges that stand between the hero and the object of desire. In fact, the more intimidating those challenges, the better. What possible things stood in the way of success? What might have happened had the client continued its previous process?

Develop the drama.

Once desire and risk have been established, you have a drama that sustains interest. Now all your tips, hints, secrets, suggestions, illustrations, expertise, customer quotes — all the stuff that makes up the body of your case study — have a meaningful context.

Just one word can make all of this so simple. Mentally (and physically, near the top of the story) stick in your “but” (or a “yet” or “however”) — a conjunction that indicates contradiction. Start to develop that narrative early, and the story’s payoff (the solution and result sections) will be clearer and more impactful.

03

Quit thinking about yourself.



Your case study should never feel like a sales flyer that just happens to start with a client problem. Stay focused on the customer's point of view, even as you explain your solution.

A compelling case study is built on a core of three basic components:

The challenge.

Using the "Go to hell!" tip from above as your guide, establish the context — who your client is, where they are, what industry they are in — and the desire. What did your client want? To trim inventory? Save time? Increase revenues? Improve profitability? Reduce transportation costs? Think of the challenge as the reason why your company was brought into the picture in the first place. And always explain the stakes, the "so what?" part of the challenge that explains why meeting or overcoming it meant something for the client.

The solution.

What did you actually do for the client or customer? The key is specificity — you want to paint a word-picture so vivid readers can imagine themselves in your client's shoes. Don't skimp on meaningful details, and keep the focus on the customer as much as possible. For example, what features of your online ordering system helped the client the most? What did the client think about your ability to convert conventionally printed materials to print-on-demand. Even in this section, shine the spotlight on how the customer benefitted rather than on what you provided.

The results.

What happened as a result of the client using your product or service? The more specifics, the better. At this point, you should come full circle to the desire stated in the challenge — but now, this is a thing achieved, rather than merely hoped for. When possible, get a direct quote from the client articulating the value your company contributed.

When the challenge, solution and results focus on the customer, you case study should have what I like to call "a deeper layer of truth" — a theme that's more important the topic itself. A story isn't really about placing labels on flats of begonias; it's about consultation. A story isn't really about an e-commerce feature; it's about brand control. Focus on the deeper layers of truth, and you'll produce case studies that resonate with prospects who aren't even in the same vertical market as the clients you feature.

04

Be lazy.



“People don’t want to read. They want to glance and skim.”

Break your case study content into manageable, simple parts. The judicious use of subheads, for example, can cut long stretches of body copy into easier-to-read chunks. But you can also use these other, visually distinctive features to enliven your layouts and make each section of the case study more enticing and compelling:

Bulleted lists.

When you have lots of information nuggets that are difficult to jam into a coherent paragraph, don’t bother; just list them as a series of bullet points.

Callouts.

Callouts are little snippets of text that are visually segregated from the main body with graphical elements such as horizontal lines, boxes, shaded areas, font treatment or any combination thereof. As you guessed by its name, callouts “call” special attention to the copy you’ve selected. Appropriate callout content types include customer quotes that directly reflect or address the issue discussed in the main body, and statistics drawn from research that quantify items relevant to your copy.

Pull quotes.

These restate an important sentence within the body of text.

Hints and tips.

Supporting thought can be offered to help readers start to think of their own situations.

Commentary.

This could include technical explanations (perhaps graphical) of copy addressed in the body that might need further clarification or definition.

Graphs, charts and illustrations.

Any of these can make your content more memorable and easier to understand. The possibilities are nearly endless, but you should always apply this practice: write captions. Don’t assume that any given graphic item is self-explanatory. Instead, identify the graphic and explain how it relates to a main idea discussed in the main text.

05

End with the beginning.



“You can’t properly introduce something until you know exactly what you’re introducing.”

Don’t write the introduction/summary or the headline until the end.

Though it violates the order in which your case study will be read, it’s consistent with the way it should be written — think about the intro last, after you’ve finished the main body. You can’t properly introduce something until you know exactly what you’re introducing. Further, writing the intro first confines your efforts; you’ll feel forced to conform your body to the introduction, when in fact, the introduction, like tailored clothing, should be styled to fit your body.

For the title, as in all types of writing, try to grab the reader’s attention. Rather than simply describe the project, focus on what it achieved. Turn the title “A Case Study on Company X,” into, “Company X Boosts ROI By 38%.” The second tells the reader what they might expect if they work with you.

06

Sincerely doubt the interest of others.



“No matter how great your case study is, no one will read it if they can’t find it.”

No matter how great your case study is, no one will read it if they can’t find it. Don’t let that happen; deliver it to prospects and clients through a media mix, and get maximum mileage from your success story.

- Include a link to the case study in your email marketing.
- Post PDF and text versions of the case study to your website.
- Write a press release about the story, and invite industry editors to read or publish it.
- Talk about your perspective of the case study in your blog.
- Invite LinkedIn and other social media channel followers to read it.
- Interview the customer on video and post the conversation to your YouTube channel.
- Use printouts of the case study as leave-behinds. Insert them into proposals for prospects in the same market.
- Refer to the case study in RFP questions that ask about recent successes.

One last thing: Act like a publisher, not a salesperson.

When polishing case studies, delete anything (phrases, entire sections, etc.) that seems like it could have been written by anybody in any industry for any audience.

Also, change copy that gives prospects promotion instead of information. Even before glancing at the case study, your prospect will know it's from your company. Obviously the reader will expect the story to positively reflect your team. No one writes a case study about a weakness or project disaster.

Credible, clear content is your currency. When editing and polishing your case studies prior to publishing them, consider what a publisher thinks about every day — the audience, editorial choices, brevity, clarity, etc. — and you'll maximize the value of your successes.

4 Benefits of Case Studies

01 Lead generation
powerful incentive to respond that attracts qualified prospects

02 Expert status
tells prospects you're a credible player with perception and experience

03 Web and social media catalyst
easy to share, send, tweet about, etc.

04 Pipeline accelerator
ideal push-over piece that moves fence-sitters into action

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