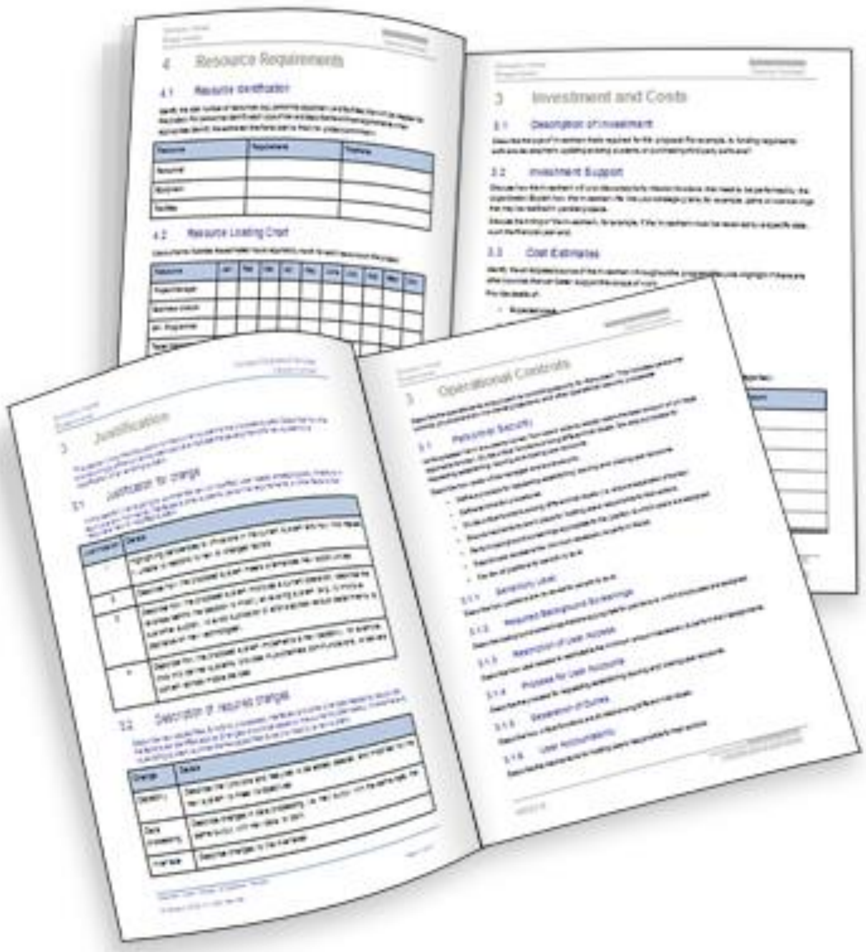
Klariti Tutorial

How to Write Case Studies



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1. How to Write a Case Study

Summary: A case study is a type of document that describes customer stories with the aim of attracting potential customers.

Case studies are a low-cost way to capture customer value stories that they be leveraged in future selling processes. Successful case studies are tailored to specific buyer personas and focus relentlessly on their needs, instead of your company or product. Self-serving case studies are a lost opportunity and a waste of resources.

What steps can you take to create case studies that engage and build trust?

At Klariti, most case studies we receive to review tend to be:

- Focused on the product, not the reader
- Written for a wide audience, not a specific role

Instead of writing product-focused case studies, try to **identify who should be writing for**, then **link your features to quantifiable benefits**.

For example, by using a specific ecommerce feature, you can reduce their shopping cart abandonments rates by 30% and generate $3M sales.

By linking features to benefits in a way that the reader can see the potential gains, you're likely to prompt the reader to learn more about your product offering, and ultimately contact your sales team.

You can significantly improve your case studies by writing **customer-driven narratives that resonate with specific readers**.

This tutorial provides marketers with a framework to develop customer stories that resonate with buyers, leading to engagement, interaction, and conversion.

Case study methods involve an in-depth examination of a single instance or event: a case. They provide a systematic way of looking at events, collecting data, analyzing information, and reporting the results.

Case Studies are one of the most effective tools you can use to promote your products and services, especially if you are on a limited marketing budget.

According to market research, after White Papers, case studies are the second most popular device used to advance the benefits of a product or service. In addition to this, they are read mostly by executives and those in the decision-making process.

A recent search on Google.com for the term "case study" showed over 15 million hits. Of those hits, almost 750,000 hits included references to Java, which demonstrates a phenomenal uptake in the IT industry. Like its close cousin the White Paper, case studies appear to be growing in popularity every year.

So, if you've been commissioned to write a case study, or are interested in starting a lucrative career as a marketing writer, this tutorial should give you a solid understanding of the fundamentals involved.

1.1. What is a Case Study?

A case study discusses a specific business situation which needs to be resolved. In general, it is comprised of four sections: situation; problem; solution; evaluation. These are discussed in more detail later.

> "A detailed intensive study of a unit, such as a corporation or a corporate division, which stresses factors contributing to its success or failure." The American Heritage® Dictionary of the English Language

Let's take a look at some examples:

- An international airline may realize that its customer service is very poor, for example following an outburst of negative customer feedback. To remedy this it hires a specialist firm to examine their processes, recommend potential solutions, implement the most appropriate service, and then evaluate the results.
- Following new Homeland Security legislation, a local government agency needs to update its approach to staff training. To address this its brings in a specialist training firm to scope the project, prepare a comprehensive course syllabus, train its staff and review the success (or failure) of the implementation.
- In response to competitive threats, a high-street retailer may acknowledge that their distribution channels are outdated and need replacing. It contacts a recognized consulting firm to discuss the business issues, impact on staff and customers, and the potential negative impact of NOT taking new measures.

Following these discussions, it approaches an international specialist firm to rollout an upgraded end-to-end system. Once this project is completed, the marketing department is tasked with drawing media and public attention to this strategic project. Part of the media plan includes preparing white papers and case studies as collateral for editors, journalists, and technology writers.

Note: Include a benefit in the title of your Case Study. Rather than simply say, 'Aerospace Case Study', add a little punch: 'Case Study on How Product X Improved Performance by 300% in 30 Days'.

These three scenarios all offer potential case study material; in each situation, there is a specific problem that needs immediate attention.

1.2. Why Write a Case Study?

There are several reasons for a company to publish a case study, for example to:

- Raise its market profile following the deployment of a major system for a prestigious client.
- Following an alliance with a strategic partner, with whom its wants to cross-sell products and services, a case study(s) can serve as an essential part of the promotional drive and media kits.

- Boost staff morale by demonstrating a commitment to advancing its new products. This may occur when a company has worked intensively for months to launch its flagship product and now want to 'bang the drum' about breakthrough features or radical new designs.
- Generate media interest by illustrating how it resolves a major business issue for a high-profile client.
- Provide journalists and technology writers with high-quality collateral to assist them when developing articles, special features and profiles pieces. Without white papers and case studies, even the most enthusiastic journalist will struggle to find material to build an interesting story.

The responsibility of writing the document is usually left to the solution provider as, for the most part, it stands to benefit most from the exposure, although the client will also receive due recognition for its role.

The benefit to the case study's authors is that it:

- Positions them as a credible solutions provider.
- Highlights their expertise and deep industry-specific knowledge.
- Allows them to introduce products and services to potential clients by sharing lessons learned from previous deployments.

From the client's perspective, the case study typically presents them as follows:

- Progressive organization that has proactively addressed critical business needs.
- Successfully embraced a trustworthy solutions partner.
- Responded positively to potential business threats and by listening to customer feedback.

1.3. Length, Format and Presentation

Most case studies are between two-or-three pages and in the range of 500-900 words, although some tend to run longer. Try to aim for three pages, and include one large graphic per page. Anything more than this and it begins to feel like 'hard sell' advertising; case studies adopt a more subtle 'soft-sell' approach.

Most case studies tend to follow the structure as outlined in the next section. There are situations where you can adjust this format, but for writers starting out in this area it's best to use this format until you are comfortable with it and then experiment accordingly.

As case studies are often printed out to be read offline, it's recommended that you choose an easy-to-read font, such as Arial or Times Roman, and allow a generous font size. Allow yourself plenty of white space.

Note: Stay focused. Avoid writing case studies that oversell themselves and propose to 'solve all problems to all people'. Identify your reader and write for them.

You can put yourself at a considerable disadvantage if you use an obscure font, which makes it hard to read or by choosing color schemes that strain the reader's eye, such as violet text on a white background.

The classic black text on a white background is hard to fault. Although white text on black has its supporters, if you choose this you may find that many readers will not print out your document as the printing costs will be excessive, e.g. for black ink toners.

1.4. Areas to Highlight

As mentioned earlier, a case study is a 'soft-sell' sales document. Its role is to highlight your abilities without resorting to 'market-speak' and sales clichés.

An effective approach to catch the reader's attention (who is frequently a potential client) is to explore how the solution helped end-users and the target group.

Support your argument with direct quotes (with their names, if possible) from personnel who've adopted your system or use your services.

To make this work, concentrate on how the solution resolved one very specific issue and then build the case study around this.

> Warning: don't complicate the case study by addressing multiple issues – stick to one subject and explain how you solved the problem in measurable and quantifiable terms.

Support your case study with statistics, figures and tables. Areas to focus on include:

Return on Investments — how did the investment in your product pay for itself. For example, it increased productivity by 50% within 2 months. Explain how you can substantiate this; otherwise, your argument loses credibility.

Cost Containment – how does the solution help companies contain costs? This area is very important as budgets are always a sensitive issue. If you can illustrate how another company who adopted your solution saved money then you'll keep the reader's interest.

Reducing Barriers — explain how your solution improves internal operations and assists management planning. For example, how does it fit into a system's workflow and business procedures? Alternately, mention how your system integrates with other applications and business critical applications.

When compiling the final draft avoid making it too dry and overwhelming the reader with excessive figures. Rather, keep the tone light, easy-to-read while highlighting the key points.

1.5. Practise

Perfecting your case study takes hard work. But, once you refine the words and polish the edges, you have a very powerful marketing tool. Indeed, those who download your Case Study will keep it on file and use it as a reference.

Once this occurs, the reader sees you as a credible, trustworthy and reliable source of information — the type of company people want to do business with.

2. How to Gather Information for your Case Study

Let's now look at how to get the information you need to write the case study.

In general, you should introduce the idea of a case study to your client as early as possible in the project. Explain to them the benefits of how this will reflect well on their company and the promotional opportunities it will offer.

For sure, don't ambush them at the last moment and expect that they should help you with your case study. Instead, frame the case study as a collaborative effort that will allow you both to highlight the great work you've done together, get some press (always a good thing), and use it to generate interest in both your companies.

Remember to send out press releases, social media updates, and other outward bound marketing efforts when you've published the case study.

Note: To learn more about how to market and promote your case study, please see the Case Study section on the Klariti website.

Use the following questionnaire to capture the necessary information to write your case study.

This questionnaire is designed to help you interview clients in order to gain a deeper understanding of how the implementation solved their specific problem.

It suggests a series of questions you can ask your client to learn more about the background to the project, what they learned during the implementing, and specific gains they made by adopting the solution.

2.1. Background

To do this, try to capture the following information:

- What is the full name of the client? How do they spell their brand name? It's Yahoo! not Yahoo.
- What is the company size?
- Where is it located?
- What industry is it in?
- How many years are they in business?
- How many years are they your client, if this is relevant?
- What is their position within the industry?
- What details about this client should be shared, e.g. dominate in market, inventor, partner, government agency?
- How many full-time employees, part-time staff, contractors, do they have? [If relevant]
- Do you have permission to use their name and logo for the case study?

Depending on the nature of the case study, capture details related to business units, employee numbers, or other relevant information that will help the reader 'paint a picture' of the client before and after the solution was implemented.

As mentioned in the Storytelling tutorial, make your client the protagonist in your case study to evoke empathy in the reader.

Once you've gathered all this data, boil it down to about 75-100 words for the actual case study.

2.2. Challenge

The next section is the actual challenge.

- What was the single biggest issue they faced?
- What challenge (technical, business, strategic) did the client want you to address?
- What made your client contact you, award you a contract, or partner with you to resolve this?
- What triggered the client to take action? For example, government legislation, market erosion, customer dissatisfaction?
- What other secondary challenges did they face? For example, staff resistance, union issues, compliance, or technical limitations?
- Why did the client contact you at the specific time? This helps the reader understand both the urgency of the product or service you implemented and also its relevance at that point in time. We can assume that if the reader is looking at your case study, they must be experiencing something similar right now.
- Why was your company qualified to address this challenge?

In a few sentences, describe the client's expected outcomes from implementing the solution?

2.3. Solution

In this section, we need to describe who, what and how the solution was implemented.

This means you need to describe more than the actual products that were deployed, but the supporting activates that occurred at the same time. For example, if you were implementing a new accounting software package, you might describe how you tested it on mobile devices for customers on the go, how it adheres to specific security requirements, and how it was integrated into other related technologies, such as back office systems.

Here are some questions to ask to understand the 'scope' of the overall solution.

- When was the solution implemented?
- Give the estimated time frame to deploy the solution.
- What products were implemented?
- If it's a range of products, describe each's role.

- What other technologies were affected? For example, back office, HR, websites and other areas.
- What version of the software was used? For example, a specific version of MS SharePoint or SQL Server.
- How was it implemented? Determine the collaborate efforts between your team and the clients. This demonstrates your ability to work with clients and overcome the inevitable issues that will arise.
- How is the solution hosted? For example, self-hosted, in the cloud, or SaaS.

2.4. Results

Here we describe the results. Ideally, we should **provide some figures to demonstrate the effectiveness of the solution**, such as how it reduced calls to the support center by twenty per cent in less than six months.

Note that these figures need to be realistic. Outlandish numbers will undermine the credibility of your case study.

Instead, offer figures that are attractive enough to encourage the reader to want to learn more. Resist the urge to overdo it.

- What were the results after the solution was implemented?
- What immediate benefits did your client see? For example, access to information, mobile sales, direct access to remote staff etc.
- What long-term benefits will your client realize? For example, reduced support calls, more visits to their website, more repeat business.
- What measurements, statistics or data support your claims?
- Costs – by what percentage or amount did the solution save money?
- Costs – by what percentage or amount did the solution increase revenue?
- Risks – what risks were alleviated by introducing the product? This suggests to the reader that if they do NOT implement the solution (i.e. if they have these set of risks), then they could be at risk. Don’t go overboard on this, of course. Suggest it.
- What new capabilities are you now able to offer? For example, a better view of customer data, faster cash collections, sales via mobile devices.

Why Us?

Finally, help the reader understand why the client choose you, your team, and your product.

- Why did you choose our products?
- Why was the product chosen instead of other rival products?
- Was this related to price, features, compliance, track record, or some other quality that might interest the reader?
- How does the new product support your overarching strategic goals?

- What was the main lesson learned during the implementation?
- What advantages does our solution offer over the competitors?

2.5. Quotes

Ask the client to provide one to two quotes describing their experience using your product.

Encourage them to write in a natural writing style.

Another approach is to phone them, talk about the implementation on the phone, and transcribe what they said. This reads much better than clichéd corporate-speak littered with buzzwords and jargon.

Or write it yourself, and send it to them for approval.

In addition to their name, get their official job title to accompany the quote.

2.6. Readership

Consider the type of person/persona that will reference your case study.

- Who is the primary target reader for the case study?
- Is it business, technical, operations?
- Can you slant the case study so that it can later be modified for different personas?
- What type of information are they looking for to help them make a decision?
- In a single sentence: what will this case study demonstrate to your reader?

In the next section, we look at how to use storytelling techniques to write a more persuasive case study.

3. How to Use Storytelling in Case Study Writing

What writing techniques should you use when writing a case study?

Let's look at how storytelling can help us write a more persuasive case study.

Storytelling?

By storytelling, we don't mean Hans Christian Andersen.

Storytelling disarms the reader.

Rather, we mean that the narrative — the story you share with the reader — engages them in some way. It resonates with them.

- Can the reader see themselves in the other person's position?
- Can the reader identify with the issues they were facing?
- How can you show the reader that the implementation delivered more than just a list of requirements and added demonstrable value?
- When is the reader likely to have the same issues as your customer?
- Where does the reader have the same dilemmas when selecting a vendor?

This is where you should consider using storytelling techniques.

In a marketing context, case studies, if written correctly, serve as a type of storytelling.

This means you need to create a 'story', one that the reader can relate to, rather than simply listing features.

Story telling devices allows us to discuss our product in such a way that it affects the reader and encourages them to learn more about the product.

Gather details on the company background.

This helps the case study reader, that is, prospective clients, understand the solution in context and compare their current situation with that of the company discussed in the case study.

In other words, you're trying to get enough information so that you can use storytelling techniques to engage with the reader emotionally. The advantages of using storytelling techniques is that it helps the reader begin to see themselves using your solution. It also makes it harder for them to dismiss your product outright if, for example, it lacks a specific feature. Storytelling is very persuasive as it by-passes the more rigid intellectual approach we typically adopt in decision making.

By creating an emotional connection with your reader, they're more likely to reflect on the product's viability after they've closed the case study, and want to learn more about you. Like any good story, if your case study is well written, it should resonate with the reader long after they've left your site.

3.1. How do you define storytelling?

Gartner defines storytelling in this context as:

- Using facts and provable statements to generate interest
- Establishing context
- Conveying emotion
- Closing with a positive outcome

The standard storytelling structure follows the following flow.

3.2. Step 1: Open with the Outcome

The first step is to describe the final result.

What was the outcome after they used the product?

Try to use real figures and data to demonstrate your point. For example, the percentage it increased productivity, lowered costs, or improved turnaround. Numbers gives credibility to your case study.

It demonstrates that you can quantify the effectiveness of your product.

Include the number/statistic/percentage in the heading and, if it works, include it the first paragraph.

"XYZ achieved a 79% increase in productivity in 21 day."

"XYZ lowered customer support calls by 47% in 3 months."

When it is not possible to quantify an outcome, spend time to craft the qualitative impact you achieved for your customer.

3.3. Step 2: Capture the current situation

Here we need to capture two things:

- Context — describe the business context and how your product/service applied to the customer.
- Challenges — outline the challenges, issues, risks facing the customer at that time.

Describing the situation before you implemented your solution helps orient the reader. It allows them to compare their circumstances (risks/issues/challenges) against your example.

It also creates an expectation that your solution will resolve these issues, encouraging them to continue reading.

3.4. Step 3: Describe the impact

Next, we describe the impact of the challenge — not your product.

- Challenge — describe the impact of the challenge on your customer.

- Cost — describe the potential cost if they had not acted.
- Don’t limit yourself to financial loses only. Costs can include different things.
- Missed business opportunities
- Inability to scale operations to meet demand
- Time consuming manual activities
- Impact on customer satisfaction

3.5. Step 4: Show a resolution

After establishing the need, the next step is to position your product as the solution.

To do this, your story need to how you helped your customer to:

- Overcome their obstacles
- Achieve the objectives you highlighted in the opening section of the case study

Read more in the following tutorial.

3.6. Summary

As mentioned at the start, one of the main differences when writing case studies is to start with the outcome, then work towards how you achieved this.

The second recommendation is to qualify your success. This means that you find ways to demonstrate in quantifiable terms how your product or service made a difference.

As mentioned, there are three ways to do this:

- Increases in terms of profit, productivity, efficiency, and other such areas
- Decreases in costs, such as overheads, staff numbers, processing times, and other capital expenditures.
- Risks that your product now helps control, mitigate against, and ensures you are compliant with legislation, for example.

In the following tutorials, we’ll look at how to write a sample case study. This is part of a series of tutorials on how to write case studies.

4. How to Structure a Case Study

In this tutorial, we describe how to structure a business case study, typically the type of document that will form part of a marketing effort.

Unlike other business documents, such as white papers, the structure of a case study is a little different. The difference is two-fold: one is that the sequence is not linear. You don't start at the start and work forwards. I'll explain why below. The second is that, to give your case study some credibility, you need to back it up with statistics, metrics, KPIs you've reached etc — without these the case study falls flat.

Ok, let's start.

4.1. Case Study Format

Make sure to follow this template when writing the case study as readers have come to expect this format.

When writing your case study:

- Explain the outcome first, then
- Describe the situation before the project was started. What was the main problem, or set of issues, they were facing before your product or service was introduced?
- Outline the impact your product or service had. Here is where we need to give demonstrable proof that the implementation improved the previous situation. Without this, it's hard for the reader to judge how effective the solution really is. Also, in terms of storytelling, without this success, the story ends on a flat note. Stats, figures, and numbers bring the case study to life.
- Close with the outcome your product/service had on the customer and their business. This is also where you can discuss their future plans, especially if it ties in with your implementation.

Typically, most business documents are presented in chronological order.

You start at the beginning and work forward.

However, with case studies, the sequence is different.

Why?

Because in case studies, the reader tends to:

- First check if the outcome applies to their situation.
- If it does, they'll download and read it,
- Otherwise they'll look elsewhere.

So, you need to start with the outcome, then work backwards towards how you got there.

5. How to Layout your Case Study

Most case studies have four parts:

1. Situation — the opening section describes the rationale for the case study, including the client's background, its current market position, and the areas of expertise that your company has contributed. You may also mention why the client selected you this project, e.g. previous deployments, awards, industry recognition.
2. Problem — the following section states the main problem which needs to be resolved, such as system performance, market expansion requirements, or new government legislation.
3. Solution — this is heart of the document. It describes the solution in detail, how it was implemented, impact on users, methodologies, and other factors that contributed to the overall deployment. Many case studies include sidebars, charts and graphs to highlight key points.
4. Evaluation — in the final section, conclude the document by evaluating the solution's impact (usually positive), discuss lessons learned, and the next steps to be taken.

5.1. Situation

In the first paragraph, place the case study in context by describing its location, partnership, or funding), continue with a brief description of its objectives, the target audience, technology and approach that will be used to implement the solution, and then close with the main results, conclusion or recommendations.

(6 to 10 lines)

Include photos, pictures and/or tables that help describe the project and easy the document easier to understand. Please include captions on all photos and tables.

Sample: In addition to providing loans and leases, the financing arm of an international financial services firm wanted to expand its product lines across other media outlets, such as internet, radio, and mobile devices.

Customer Profile

Describe the customer's areas of specialty e.g. web-based CRM provider; flagship products; alliances and partnerships; notable achievements.

Outline the issues that your customer is faced with (i.e. their pain points) and how your solution has addressed these.

Identify the strategic or competitive reasons that caused you, or your customer, to require this solution.

(5 lines)

6. Problem

6.1. Context

Expand on the background of the case study by highlighting the main reasons behind this project, such as significant problems, business drivers and, if appropriate, details of the physical location, government legislation, socio-economic, and technical factors.

(6 to 10 lines)

Sample: How can the subsidiary of a luxury fashion designer house leverage its well-known brand to expand into other services? How could these products be developed, branded, and brought to market?

6.2. Objectives

Describe the project's aim with details of its specific objectives and the strategies used to achieve them.

Sample: The challenge was to establish an ecommerce site that would offer a web-based business opportunity to entrepreneurs wishing to capitalize on the growing popularity of ecommerce. The solution would need to allow the fastest possible time to release, reliability, and flexibility. Java technologies were selected over several alternatives because of these requirements.

(6 to 10 lines)

6.3. Finding the Right Partner

Describe why the customer selected your product or services. Expand on what they liked about your company, particularly in terms of your ability to solve their problem.

Highlight the unique skills your company offered in designing, developing, and implementing the solution.

7. Solution

7.1. Process

Describe how the project was delivered including key concepts and methodologies adopted.

Describe each phase of the process in detail and how issues were addressed. Describe both positive and negative aspects of the process. Highlight where/when the solution impacted users; describe the target audience, and methods and technologies used including rationale e.g. feasibility costs. Describe the main project phases; problems encountered and how they were resolved.

(20 to 30 lines)

Sample: Following the research phase of the project, we developed an integrated strategy to align both the offline and online brands. Long-term goals were identified for the products, and milestones were established to drive the implementation timeline. An implementation plans were created for each product etc.

7.2. Using the Solution to Solve the Problem

Describe the process involved in planning the solution, including all resources used, certified individuals and their respective roles, and the business problem the solution was meant to solve. If possible, identify critical success factors.

7.3. Technologies and Delivery Method

Describe the technology used in the solution, including the delivery mechanisms. If an online solution was used, describe the delivery and timeframe as well as any value added services provided, e.g. the solution is based on Windows architecture and the Component Object Model.

7.4. Key Components

List the technologies used on the implementation, for example:

- Software
- SQL Server
- Visual SourceSafe

List third party tools:

- IBM MQ
- SAP
- Oracle

List Hardware used in the case study:

- Dell servers

7.5. Financial resources and partners

State the costs and any sources of funding, where appropriate.

Describe the partners and their role in the project.

(6 to 10 lines)

7.6. Graphics

Include attractive screenshots of the solution, for example the finished website, product screen or headshots of key personnel.

8. Benefits

8.1. Results and Benefits

Provide a summary of the business benefits the solution provided. Focus on quantifiable business value, such as the tangible cost savings, a specific increase in sales, or a specific reduction in operating costs.

(10-20 lines. Use graphs and tables)

Return on investment figures will greatly increase the impact of the case study. Provide figures, if available, e.g. percentage of improvements etc. Include bench-markings where appropriate. Describe the degree in which objectives were realized.

Sample: We helped the client quantify its opportunities and defined a clear course for developing and launching new products. This project enabled the client to extend its brand into new markets while preserving its core brand values.

8.2. Customer Quote

Include a customer quote on the business value of using this solution. State the business benefits of your solution and the advantages that your technologies and/or services have provided. When quoting, include the person’s name, position, and company name.

(3-5 lines)

We helped the client quantify its opportunities and defined a clear course for developing and launching new products. This project enabled the client to extend its brand into new markets while preserving its core brand values.

8.3. Lessons Learned

Describe the positive aspects of project implementation, the problems encountered and how (if) were they addressed. Describe how other parties could use the solution.

(15 to 25 lines)

8.4. Ratings

List any rating programs and ratings of this project including date and level achieved.

(2-3 lines)

8.5. Awards

List any awards associated with this project including award name, date, and category.

(2-3 lines)

8.6. Media Attention

List any book, periodical, or website in which this project has appeared including: publication name, publisher, publication date, volume, issue, page or URL.

(2-3 lines)