



The Klariti Guide to Writing Case Studies

Checklists, Examples, and Tips!

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How to Write a Case Study

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, next to White Papers, they 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.

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 that stresses factors contributing to its success or failure.” The American Heritage® Dictionary of the English Language.

Three examples

Let’s take a look at some examples:

1. 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.
2. 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.

3. In response to competitive threats, a high-street retailer may acknowledge that their distribution channels are out-dated 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.

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

Tip: 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'.

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 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.

Length, Format and Presentation

Most case studies are between **two-or-three pages and 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**.
- 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.

4 Ways to Structure 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.

3 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.

Remember: case studies that oversell themselves by proposing to 'solve all problems to all people' aren't read. No-one believes such claims.

Last Word...

Perfecting your case study takes practice.

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 most people want to do business with!

15-Point Formula For Promoting Your Case Study

The next question is: how to we find prospective clients?

1. Create a writing portfolio.
2. Show the prospective client examples of high-quality case studies. Paint a picture so they understand what you'll need from them to make this work.
3. Ask them what they like, dislike, things that stands out, and color schemes they enjoy. If they have company templates use them, otherwise build new templates in the same style of what you've shown them.
4. Agree on the technology (or service) the client wants to promote. This should be very clear. If you can't agree on this, stop and clarify expectations.
5. Get a list of customers who're willing to provide endorsements. Don't expect them to write compelling 20 word quotes. That's your job.
6. Write these quotes and send it to them. Get the approval and re-write where necessary. Recycle the unused quotes for other publications – let nothing go to waste.

Tip – always keep you eyes peeled for examples of great writing. Copy any quotes you find on brochures, magazines, and websites into a resource file. Use this for inspiration when you need to keep things fresh.

7. Get the Project Sponsor (i.e. the person who hired you) to gather screenshots, company logos, tech specs, datasheets etc. You'll need these for the glossy PDF.
8. Start interviewing people. Ask them: what was the problem, how was it solved, and what difference it has made. Ask specific questions and you'll get specific answers. Have your list of questions ready before you call them. Don't make it up on the fly.
9. Compile the facts, statistics, and market research. This gives your case study more weight.
10. Send it out for review. Good, bad or indifference. It doesn't matter, but you have to get feedback!
11. Refine the material and then publish it. Never send out a publication without getting another person to check it first.
12. Send a PDF of the Case Study to every person who helped you with a thank you note (and business card) enclosed.
13. Thank them for their efforts and encourage them to publish it on their website.

Tip – Remember this is an opportunity for you to generate more leads by demonstrating your professionalism. Contact everyone in person by phone – not email – and confirm that they got the PDF.

14. If you want, tell them how great it looks when printed and ask if you can send over a hard-copy. In this way, get your nice, shiny case study onto their desk!

15. Generate enthusiasm. Share whatever positive feedback you've received from journalists, partners, and customers.

You want them to feel that their business must also have a case study.

And who's going to write it for them? Maybe you...?

Structure and Format

Case studies and white papers are very effective tool to promote the benefit of a product or services. Case studies are the first most popular device used to promote the business. If you are planning to write a case study this passage will help you to understand more about this kind of writing.

Let's look at the following three sections in your case study.

1. Problem
2. Implementation
3. Results

The 'problem' sections have to hold a punch. In other words, it has to signify something to the person who reads something that they are able to relate to.

All the time write about a topic that has important business impact for the reader. Demonstrate how your creation resolved a serious business problem what you are implying in this segment is that if they want your service, you be able to resolve their issues...

Definitely, the more explicit the case study, the more successful it will be. Case Studies that recommend solving all troubles are not taken seriously.

Highlighting the Benefits

In its place, think on how the solution, or service, addresses a very explicit topic. You should be very careful here, as the whole case study is built in the region of this single issue.

Don't dilute the concentration of the case study by addressing more than the single issue fix to one area and make clear how you can resolve the crisis in measurable and proven terms.

Reduce barriers

A case study writer should be able to demonstrate how their solutions improve operations.

For example, how does it suitable for their business process?

This is an excellent area to state how your scheme plugs into other applications or costly business significant applications.

You must use your conclusion when compile the last case study document. Avoid make it too technical or overfilling it with unnecessary statistics.

7 Case Study Best Practices

#1 Open With The Conclusion

- The introduction is the best place to summarize your findings - including the conclusions that you have made.
- Other publications, such as newspapers, use headlines and paragraph summaries to hold the reader's interest: white papers benefit from the same approach.
- Putting the conclusion at the end of your white paper make senses, but you need to be careful as this section is often overlooked by the reader, many of whom won't read to the very end.

#2 Customers are Investors

- Think of your customers are prospective investors. In addition, investors are a very discriminating audience.
- Maintaining their attention involves building trust and offering facts that are interesting, relevant, and true. They will look for trustworthy evidence to substantiate your claims.
- By providing this evidence, you not only save them time but also increase your credibility. Finding meaningful testimonials is well worth the effort.

#3 Avoid Assumptions

Before getting into the details of your solution, clarify the following.

- Is it a product or service?
- Is it hardware or software?
- What are the prerequisites?
- What platform is it designed for?
- Where language is it written in?
- Who will use the solution?

#4 Be Ultra Specific

- After providing this preliminary information, get to the main issues.
- If you know that your readers are, for example, technology experts then don't try to teach them about the basics.
- Describe specific aspects that will ring true with your audience.

#5 Make it Memorable

- It is one thing to claim your product solves a problem, but it's more convincing to describe how it does this.
- Provide evidence that your solution is better than your rivals are—and then substantiate this with, for example, benchmark tests.

#6 Balance the Text v. Graphic Ratio

- Use graphics, tables, and charts to help the reader understand your product.
- Graphics help illustrate the relationship between concepts, technologies, and systems.
- Readers will tire after several pages; graphics, tables and charts serve as an alternative to the text while still maintaining their interest in the subject.

#7 Remove Deadwood And Jargon

Remove wordiness and deadwood phrases and replace them with better expressions.

The following is a list of the 'most wanted' culprits. The "deadwood" comes first:

- according to our data -- we find
- accordingly -- therefore, so
- after the conclusion of -- after
- ascertain the location of -- find
- by a factor of two -- two times, double, twice
- come to a conclusion -- conclude

- give consideration to -- consider, examine
- give indication of -- show, indicate, suggest
- in close proximity to -- near
- in some cases -- sometimes
- in the event that -- if
- in the near future -- soon
- in the neighborhood of -- near, about, nearly
- in view of the fact that -- because, since
- it is our opinion that -- we think
- it is possible that -- perhaps
- it is well known that -- (nothing)
- it may be said that -- (nothing)
- make inquiry regarding -- ask about, inquire about
- manner in which -- how
- not with standing the fact that -- although
- on the basis of -- from, because, by
- on the order of -- about, approximately
- present in greater abundance -- more abundant
- prior to -- before
- provided that -- if
- put an end to -- end
- reach a conclusion -- conclude
- serves the function of being -- is
- subsequent to -- after
- the question as to -- whether

- there can be little doubt that -- probably
- utilize or utilization -- use
- with reference to – about

As mentioned before, an experienced business writer will guide his or her readers through the document and avoid confusing them with acronyms, convoluted sentences, and labyrinthine paragraphs.

- Simple, clear writing is concise, effective, and persuasive.
- Improve the effectiveness of your business documents by adopting a clear writing style, which in turns improves your chances of winning new customers.

About Klariti

Klariti develops 'content assets' using white papers, case studies, and industry reports.

We examine, develop, and benchmark content for Government agencies and Financial Service firms to support their social media, corporate blogs, and email communications.

Our website – [Business Writing For Smart People](#) - reflects what we do. If you find something there that's interests you, drop us a line.

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