

The little book of...

case  
studies





## This guide covers:

- When to use a case study
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- How to ask your client for a case study
- Planning your case study
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## 92% of people seek social proof before making a purchase.

And the interesting thing is that third-party reviews are trusted as much as a personal recommendation. Social proof helps to establish trust and command action, because people inherently copy others and emulate their behaviour in certain situations.

In the world of behavioural science there are 6 types of social proof: expert, celebrity, user, the wisdom of the crowd, the wisdom of your friends, and certification.

Case studies are so effective because they leverage 'users' – people who are currently using your product/service and sharing that experience. Rather than you simply stating, *"Look at us, aren't we so great!"*, it's one of your customers saying, *"Company ABC did this for us and it had XYZ impact."* Telling your story through the users' eyes makes it feel real and creates a connection with the reader.

In storytelling technique, it's known as the 'relatable middle ground' – where your prospect can look at your client and think *"they're just like me – and if Company ABC helped them, they can help me too"*.

Besides putting your product/service into context to show the actual benefits realised, case studies are high-value content for other reasons:

**Testimonials:** these soundbites are perfect to use across all your marketing content to provide 'evidence' of the value you offer.

**Repurposing:** it's really simple to transform your case study into something else - like a series of blogs, editorial, or a white paper - to extract more value from it.

**Insights:** through interviewing your clients you unlock what really matters to them. Use this intelligence to tweak your messaging so it really resonates with your audience.

When should you use a case study?

Case studies are wonderful assets because they can be used at various stages within your sales funnel.

**Lead generation:** trade publications and events love to showcase case studies because they are real-life use cases.

**Marketing qualified lead:** case studies are a great way to build trust with a new prospect by showcasing the value you provide.

**Sales qualified lead:** need to chase a proposal? Case studies are a great excuse to 'get in touch', without needing to send the dreaded "*Just wondering if you had an update on...*" email (which always gets ignored!).

**Client:** this important part of your sales and marketing process is where your clients transform into brand advocates, wanting to share their story and 'sell' you to their network.

## Template: case study working process

- **Ask the client for permission:** ideally you want to be able to use the company name and logo.
- **Plan your case study:** what is the narrative behind this customer story? What key messages do you need to convey?
- **Get your briefing:** as well as interviewing your client, there will be internal documentation – like proposals, statement of works document, and update reports – you can use.
- **Create a skeleton:** outline the key sections with the core messaging for your client to review and approve.
- **v1:** create the first draft of the copy – there should be few amends come back because you've already agreed the outline, v1 simply fleshes it out.
- **Amends:** tweak the copy based on your client feedback to ensure they're happy to sign off.
- **Publish:** once you've got the green light, get it out there and start shouting about it.



**Note:** this template is my working process, which I have refined over time. I'm not saying it's the 'only' or the 'best' way to produce a case study, it just works for me.

Now let's look at these steps in a little more detail...

How to ask your client  
for a case study

“We’d love to write a case study about [PROJECT]. Is that ok?”

I’ve worked with many companies who suffer case study anxiety. But if you’re proud of the work you’ve done and would like a case study so you can talk about it, just ask – the worst they can say is no...

...and even then, there are ways around it (see ‘How to overcome common problems when writing a case study’).

# Planning your case study

## What are your supporting messages?

Once you have established your key theme, you need to decide on 3(ish) messages to support your narrative, which will be used to tell the story.

For example, if your big idea is 'agility', your supporting messages could be:

- Cloud-based infrastructure to support collaboration, which enables hybrid working.
- Feedback mechanisms capture the voice of the customer to prioritise new developments.
- Changes to the process allow for experimentation so bad ideas fail fast, and good ideas scale quickly.

Think of structuring these supporting messages as:

"It [FEATURE], so you can [BENEFIT], which means [VALUE]."

This way you're always focused on the outcome (i.e. the 'value') rather than the product/service.

The briefing process

## Get smart before you start

When I think about content, it's not just the conventional marketing assets, like LinkedIn articles, blogs for your website, or the company brochure. I include everything you produce as part of your business-as-usual activities - the proposals, statement of works, project wrap up sessions, comprehensive sales deck, the random musings you jot down...everything.

You don't realise it but there is already so much valuable content within your business. It isn't necessarily produced for promotional purposes, but it can be repurposed.

The great thing about internal documentation is that it's written by your subject matter experts. From their proposals you can lay down the bare bones of your case study without needing to pin them down for a quick chat – you have their insights already. Now all you need to do is tailor your questions to tease out all those nuggets of gold from your client.

## Template: briefing questions

- Who is the target audience?
- What causes them pain?
- Why did the client choose you? And why now?
- What is the big idea (*problem or opportunity*)?
- How is the big idea affecting the client? (e.g. regulatory/compliance, staff productivity, team morale, efficiency, business growth...etc.) Try to quantify the business impact.
- How does your product/service best address these issues? Try to include real examples of how your product/service is used by the client.
- What has the reaction been across the business?
- How has it made a difference to their specific role? What can they do now they couldn't before?
- What are the client's future plans?
- How will your product/service support those plans?

...And perhaps the most important question (*unless you want to land yourself in hot water and damage your relationship*) - who needs to review and approve the case study before it's published?



How to overcome common  
problems when writing  
a case study

## Problem: lack of statistics

This is the most common issue I come across – either because the client never thought to measure so doesn't have them, or because they're nervous about stating metrics in the public domain.

If you can't be specific about the outcome, is there a more generic way to share it - but in a way that is still meaningful? Or if that's not an option, can you infer the results based on third-party research?

For example:

**Best:** “Company ABC was able to boost our agility by 50%,” said David Smith, CEO of [CLIENT]. “When compared to the same period in the previous year, we secured an additional £5m profit.”

**Better:** “What used to take the team 2-weeks to complete, now takes an average of just 7-days.”

**Good:** ‘By helping [CLIENT] with XYZ it enabled them to get to market quicker. As research from [ANALYST] shows, companies that get to market quicker are 3x more likely to gain the competitive edge, which results in 20% higher profitability.’

## Problem: weak testimonials

"We would really recommend Company ABC."

It leaves you questioning "So *what...*?" because it doesn't tell you anything about the product/service. A better example would be:

"Company ABC gave us the agility we need to futureproof our operations."

Now you have some indication of the value received – in this case, agility to keep pace with change. An AMAZING example would be:

"Company ABC ensured our business remains always ready to respond to changing market conditions. When the pandemic hit, our staff experienced zero disruption to business-as-usual."

So how do you secure these strong testimonials? Simple. Write them yourself. It might sound a bit cheeky, but the reality is:

- If you've done a good job, your client will want to give you a good testimonial.
- When you put people on the spot they're often lost for words.
- From working with them you know how they feel about you, and can align that with your messaging so it can be used as 'evidence'.

In my experience, clients are always grateful to have testimonials written for them. And as long as you haven't gone completely off-piste, they'll only make tiny tweaks (if at all!).

If you're feeling nervous about this change, position it to your client as 'suggested wording'.

## Problem: no consent

Occasionally you come across the incredibly annoying, “*No, we can’t do a case study.*” And it’s not because you’ve done a rubbish job, but because someone in legal got nervous and handed down a blanket “*No!*”. Or it could be that what you’ve done is so sensitive/competitive that it puts the client at risk to talk about it.

In this situation, write an anonymous case study. It’s not quite as powerful because you can’t put a brand against the story, but it’s still a situation your wider audience will resonate with.

Even when writing an anonymous case study, it’s important to communicate who the client is. Ok, you can’t say the name, but you can share the sector, company size, job title – just some detail that helps your wider audience to see themselves in that client’s shoes. And you can still share all the details – results and all – that you would in a by-lined case study, just as long as the client cannot be identified.

In this situation, an alternative question to ask clients is: *“Can we use you as a reference?”*

Some companies cannot speak publicly but would be allowed to talk 1-to-1 with a prospect you’re in discussions with. Again, the worst they’ll say is “*No!*”, so it’s at least worth asking the question.

Apply storytelling technique  
to get in the right  
mindset...

Yes, a case study is there to showcase the amazing work you've done for your clients. But there is still a right (and a wrong!) way to position it. This is where storytelling technique really helps to get your point across in the best way.

## It's not about you

A harsh truth I know, but it's never about you. So stop talking about what you did, and start talking about the outcome your client experienced.

A story has 3x key roles:

**The hero:** this is your customer, ALWAYS.

**The villain:** a representation of the pain your 'hero' faces – for example, regulatory pressure, spiralling cloud costs, failed transformation, fast pace of change, competitive threats...

**The guide:** you. You are there to 'guide' the 'hero' and help them do whatever is necessary to defeat the 'villain'.

As you plan out your case study, keep those characters in mind to ensure you focus on what really matters to your audience, rather than getting stuck down in the detail of features and benefits.

## Make them feel something

People buy based on emotions and rationalise their decisions using reason and facts. But that doesn't mean you need to write a creative work of fiction, full of flowery language, and evil lurking round every corner – there is a way to be professionally emotional.

Take a moment to think about how the frustration caused by the 'villain' is making your hero feel, for example:

- Scared about the consequences of non-compliance?
- Overwhelmed about where to start?
- Excited about new opportunities?

When you apply storytelling technique to your case studies it involves inserting trigger words (for example, 'seen', 'heard', 'feel') that hook the audience into these emotions and help them to visualise what you're trying to tell them.

And ideally use high arousal emotions (like awe, excitement, anger, anxiety) to evoke a reaction from your audience.



## Talk to them (literally!)

Dialogue is a great way to talk to your audience in their terms, which shows empathy and builds trust.

So often I see case studies with huge sections of copy, finished off with a little testimonial at the end. It makes no sense to me. Tell the story through your client's words, for example:

“Over the last three years we'd gone from a headcount of 50 to 200. We knew we needed a tool to help us overcome the growing pains while maintaining an agile startup mentality.”

**BONUS!** Not only will your case study resonate with your audience more because the story is coming from a peer, you can also extract lots of lovely soundbites to use in your messaging and content.

Case study skeleton

Traditionally you'll see case studies structured as:

- About the company.
- The problem.
- What we did.
- The results.
- Client quote.

It's so formulaic and doesn't align with the audiences' expectations. Your audience only really cares about themselves, so they're only going to be asking, "*What's in it for me?*". Therefore, you haven't got time to lament about the industry as a whole, your client's background and 1,000 other words that have no meaning to your audience.

This is why your theme is so important. It keeps you focused on what's important to your audience, and how you can help them – because you have proof that you've helped another company who was in a similar position.

## Template: case study structure

- **Headline:** state your big idea.
- **Summary:** 3x bullet points to highlight the key results (i.e. your supporting messages).
- **Section 1:** What's the big problem? What impact did it have on the business (include concrete examples?) And why did they choose you?
- **Section 2(ish):** How did your product/service overcome the problem? Structure this as 3x mini sections, using each to elaborate more on one of your above bullet points.
- **Section 3:** The future – what does the client intend to do next? How will your product/service support them?

Case study headlines

This must be more than '*Company ABC case study*'. The title is the single sentence that will make the audience decide whether or not to read your case study, so make it compelling and ensure it resonates (remember, it doesn't have to make everyone click, just the right people).

## TOP TIPS!

- I always leave the headline until last because it's the single most important sentence, and therefore requires more thought than the rest of the case study.
- Place your client (the hero) before you (the guide) in your headline – for example "*[CLIENT] gets to market 10-days earlier because of Company ABC*".
- Highlight the problem/opportunity to help the case study immediately hook the audience in.
- Think about adding intrigue by posing a question – for example, "*How does [CLIENT] release products in 10-days when the industry average is 20?*"
- And just as you would with SEO, think about packing in some keywords to help your case study gain exposure online.

What your case study  
summary should include

Even if your audience fails to read the entire case study (a high likelihood if they're busy people), you want them to still take away the key highlights. Start with your 3(ish) supporting messages and craft them into compelling outcomes. For example:

“Eliminated 5 levels of approval by empowering people to make their own decisions.”

Keep each point clear, clean and simple by focussing on one idea per bullet.

Leave a lasting impression by front-loading some intense verbiage – for example, ‘eliminated’, ‘killed’, ‘exploited’.

Get some lovely statistics in there.

And write it in the past tense to reinforce these are outcomes you have delivered.



How to write the main body  
of your case study

Your 'big idea' is the central theme that ensures your finished case study hangs together. It's also crucial when it comes to editing – anything that doesn't relate to this theme is instantly deleted to ensure your piece stays on topic.

You need to introduce the client, but rather than embark on a lengthily narrative about their company history, look to highlight the points that support why/how they've reached the point where they're now facing a particular problem/opportunity. For example, healthy growth can lead to siloed ways of working, while new industry legislation presents opportunities to enhance customer service.

In the next paragraph, you want to introduce your differentiators within the context of why the client picked you. Don't bash the competition, simply highlight why you excelled and 'sealed the deal'. It's this sort of decision that could be weighing in the mind of your audience – particularly if they have shortlisted you against another provider.

Then take the next few paragraphs to highlight your 3(ish) supporting messages. Structure each message as a standalone story, highlighting the specific business impact the client experienced and the outcome they achieved, including concrete examples.

And think about adding some subheadings to help the audience to skim read and lift the key messages.

*Conclude your case study*

In this final section you want to show how the relationship is ongoing, and how you can continue to provide long-term support and value to the client.

Avoid ending on something dull like, *“Already we’re in discussions about setting up a managed service.”* Again, it’s a “So what...?” moment. Instead, end on an aspirational note – what is your client planning on doing next? Scaling the business to IPO? Entering a new sector? Onboarding a new acquisition? World domination? Then relate the conversations you’ve had to show how your product/service will enable them to achieve their vision of success. For example:

*“Our strategy is to grow through M&A, which means aligning the new companies against a common goal and blending ways of working. Company ABC will smooth the transition by taking care of our infrastructure needs during the change. This leaves us to focus on welcoming our new people and helping them to settle in.”*

And finally...

Finish on a high – find that gorgeous short, sharp soundbite that you want them to replay in their mind, for example:

*“Ooh, and she makes amazing cakes!”*

Don't forget your  
call-to-action (CTA)

Every piece of content you create needs a CTA - otherwise what's the point in creating it?!

Think about:

- Where the audience is in your sales cycle.
- What you want them to do as a result of reading this case study.
- What the logical next step is.

It may be they're ready for a hard CTA, like 'Book a demo'. Or a softer CTA, like 'Watch a demo video' might be better to nudge them further along your sales funnel. Remember to be really specific with your CTA to set expectations about what happens next:

**Good:** "Watch a demo video"

**Bad:** "Find out more"

And ideally make the CTA relate to the case study. For example:

"Watch this video about XYZ application if you too need to support disparate teams with collaboration."

Finally, MAKE IT OBVIOUS. Hyperlink the text, include a button, use a different colour, use a larger font size, make it bold – anything to make the next action obvious and super simple to do.

Some things to keep in  
mind...

## Don't fixate on the length

Most of the case studies I write naturally end up at about 1,200 words. But I've also written some 500-word beauties that are effective at producing results. Rather than add fluff to pad it out, or strip out the good stuff to cut it down, focus on making every word count.

## Don't be a smart ar\*e

Using long and complex words doesn't make you sound smarter. In fact, it's the best way to ensure you lose your reader - the moment they pause to think 'what does that mean?' they're gone. As a rule of thumb, if you wouldn't say it in conversation, don't write it.



## Don't talk about 'solutions'

It's one of my pet hates because the word means everything and nothing. If you want to appear credible, be specific. Don't talk about 'cloud solutions', talk about 'applications', 'systems', or 'platforms' – each of these words means something different and conveys more information about what you have to offer.

## Don't spell it out

Rather than go down a rabbit hole to pitch your product/service, simply name it and link to a relevant page on your website. It helps the case study to stay focused, is good for SEO, and in the case of user journeys, helps you to track interest.

# Editing your case study

**Step 1:** sleep on it.

**Step 2:** ideally, sleep on it some more.

Essentially get some distance between you and the first rough draft. When you start to edit, you want to view it through fresh eyes and see the words you've actually written – not the words you thought you'd written.

**Step 3:** grab a coffee (a slice of cake always goes down nicely at this point!).

Step 4: edit.

## Template: editing guidelines

- Have you written appropriate to the audience?
- Is it on topic?
- Is there one clear point per paragraph?
- Do your links work?
- Have you used a consistent tone (1st vs. 3rd person, corporate vs. personal)?
- Have you used a consistent tense?
- Have you overused punctuation (em dash, exclamation marks, ellipsis...)?
- Have you checked products/services/companies/names/brands are spelt correctly?
- Have you checked for SEO?
- Have you removed uncertainty (delete 'possibly', 'probably', 'might'...)?
- Did you delete nothing words ('that') and change horrible words ('solutions')?
- If you only read the headings, do you still get the key message?
- Have you read it aloud to check it sounds right?

Once your case study  
is published...

Never under-estimate how amazing your case study is. It's the ultimate evidence of your skills, knowledge and experience told through the words of a happy customer. It's a real-life example of your product/service in operation, which demonstrates actual results delivered with a third-party endorsement. Give your story the exposure it deserves:

**Issue a press release:** case studies make great news segments because they're real stories – especially if you've got some lovely data and testimonial in there.

**Pitch an article:** select a couple of key publications for your audience and pitch the case study as editorial, using additional research and commentary to discuss the wider issue.

**Send it to customers:** share with your sales team so they can send it to prospects that need a gentle nudge in the sales cycle.

**Email marketing:** write a short, sharp communication (150 words is more than enough), to highlight the results with a link to read the story in full. Track click-throughs and follow up.

**Get social:** pull out some social snippets and share on the platforms relevant to your business to drive traffic to your website.

**Enter an award:** case studies make great award submissions, again, because it's your story told through your customer's words. Simply repurpose to answer the questions.

**Pitch speaking opportunities:** from small local events to larger conferences and exhibitions, it's worth talking to the event organisers to try and secure a place in their programme.

**Get your team involved:** most likely your people will feel proud of their work. Encourage them to share the case study through their personal social channels for greater reach.

**Ask a favour:** it's also worth asking your client if they would be happy to share the case study with their own contacts – chances are they know someone in a similar situation and are keen to help.

**Write a blog series:** just as with the editorial, write a blog series that explores the periphery areas in more detail and drives to the case study as the CTA.

**Pull out the quotes:** share them everywhere (ideally with a link) and insert them into other pieces of content to use as 'evidence' of the value you offer.

**Find the small spaces:** from email signatures to bios, adverts, packaging, office art – there are plenty of opportunities to share your results/quotes.

*A final thought...*



Now you have this amazing case study and are on the road to securing some great results from it, don't forget to give your client a massive THANK YOU!



Say hello!

Want to turn your professional wins into a compelling narrative that converts new clients?

I'm the case study writer for you!

Whether you're too busy or simply can't find the words to express your ideas, I promise to deliver 'more than words':

**Find the details that matter:** when you're close to a topic an outsider helps to structure your story into a cohesive, compelling message.

**Add substance to ideas:** I'll add weight to your copy by wrapping it in deep research and commentary.

**Make it personal:** it's not always easy to write about yourself, which is why I'll mimic your voice and infuse your copy with genuine personality.

[hello@alicehollis.co.uk](mailto:hello@alicehollis.co.uk)



**More than  
words**