TechValidate
by SurveyMonkey

The Comprehensive Guide to Maximizing Impact with Case Studies

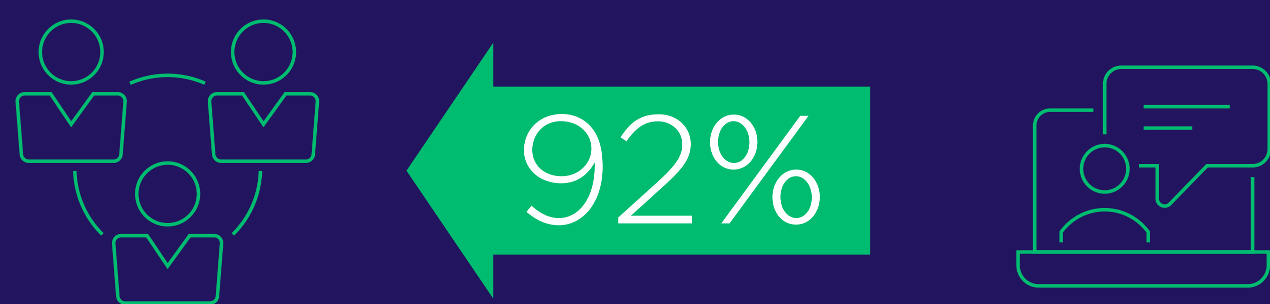
TechValidate
by SurveyMonkey

Welcome!

Why do we need case studies?

When you're shopping around for a new doctor, what do you trust more: a friend's suggestion, a few yelpers' raving reviews, or the doctor's own claim to be the best in town? Chances are, you'll first look to friends and family members or check out peer reviews. The reason is simple: when making a purchasing decision, buyers want proof.

Enter, case studies. Not only do they lend credibility to your marketing claims, but they're also super effective for educating prospects on your solution's diverse applications.



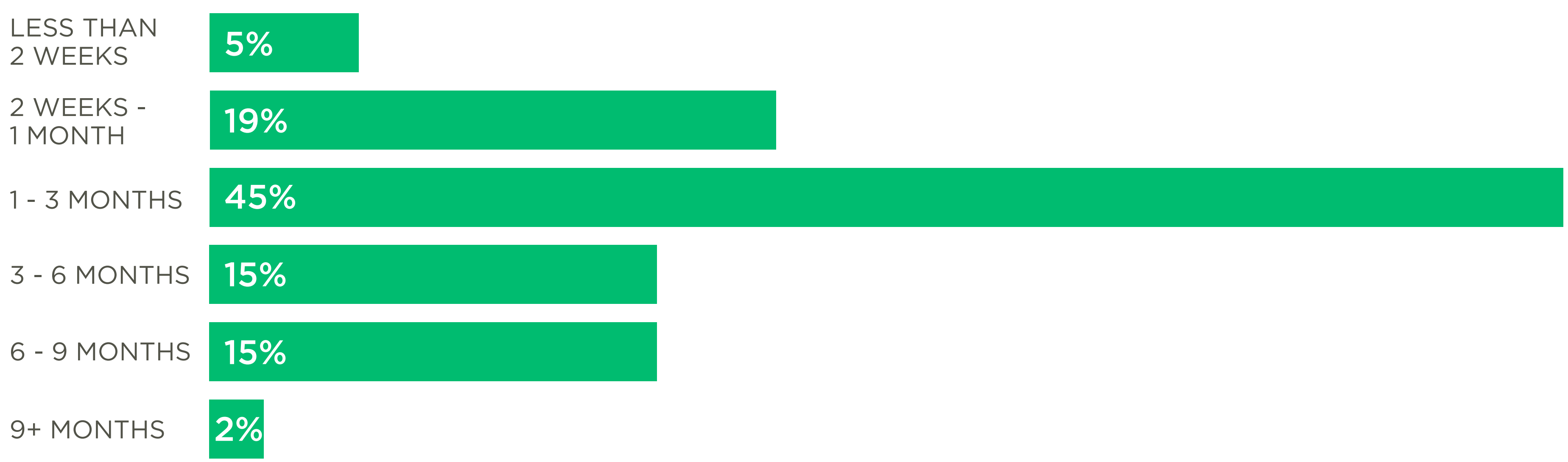
A Nielsen study found buyers are 92% more likely to trust peers over marketers.

But, for all their benefits...

Case studies are no walk in the park. Between the preparations, research, interviews, writing, editing, design, approvals, and publishing, case studies can be extremely time-consuming. In fact, we surveyed our customers and found that **77% spent over a month on each case study—and 32% spent 3 months or more!**

And unexpected setbacks, like a bad interview or an unresponsive contact, can delay the process even more—or worse, leave a fully written piece with a major client in a legal impasse, where approval delays slow the process to a crawl.

Average time to create case studies



The challenge

"Having been a former member of the sales team, I know how incredibly powerful it was to have those client stories in helping convince somewhat skeptical prospects. But meeting with existing clients, crafting their story, and presenting it in a meaningful way to our sales people was a huge time suck.

As a result, we had a couple of really good case studies but they were few and far between, and they did not fully represent the growing portfolio of hotels, resorts, and vacation rental companies that we work with around the country."

Jeff Robertson,
Director of Marketing,
NAVIS

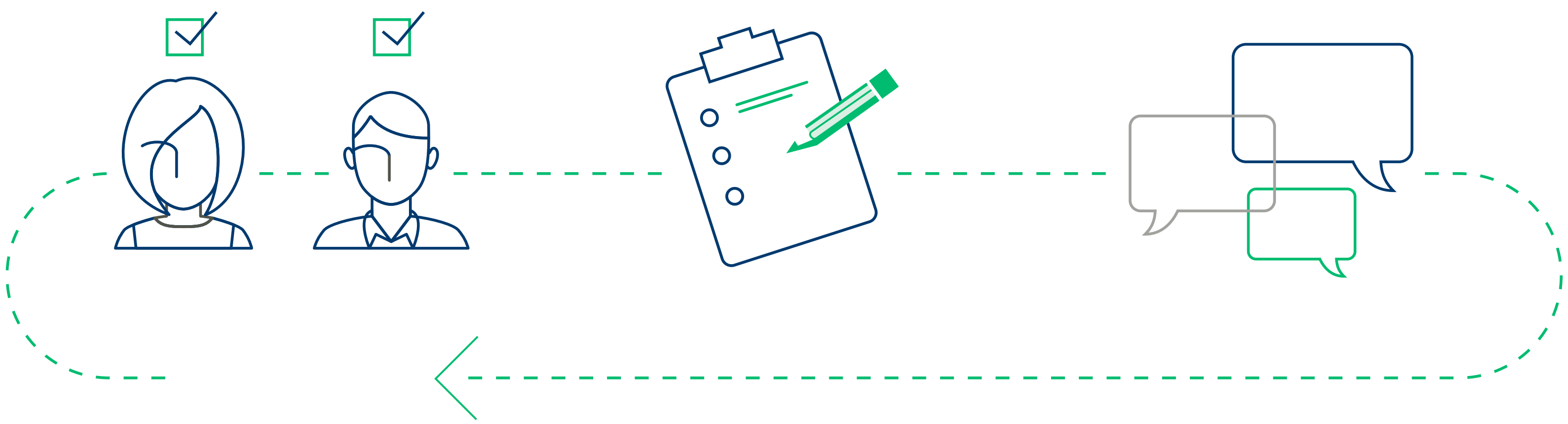
TechValidate
by SurveyMonkey

Your guide to mastering the art of case study creation in 3 steps

We created this guide to help you avoid a few common pitfalls in the case study process, as well as provide some tips to maximize the impact of your case studies.

1 Come prepared, leave successful

As you select customers to work with, write interview questions, and begin customer discussions, do your homework first to avoid wasting your time—and your customers'.



Streamline how you identify case study candidates

Don't rely on your sales team alone to pass on their customer contacts. Their priority is selling, and that can leave some major gaps in the flow of customer references. As a result, one month you may scramble to kick off projects with dozens of sales-identified customers, while the next you have nothing to work with.

Taking back the reins and reaching out to customers directly is more effective, but it also runs the risk of excluding customers who want to share their positive experience—they just haven't been asked to.

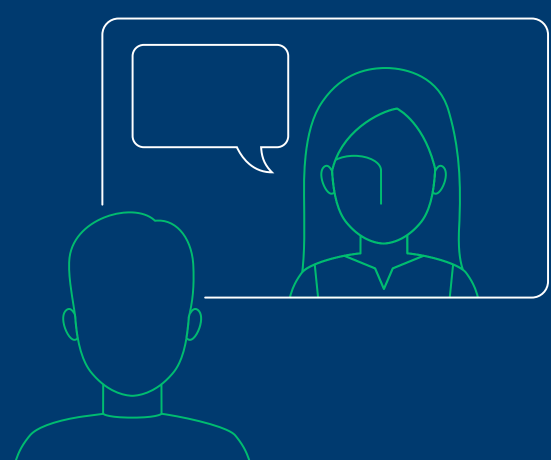
Increasingly, marketing teams are using customer surveys to gauge interest. Because surveys are fast and easy for the customer to fill out, they're a lot more effective at getting tons of responses. You can even ask clients to specify exactly what marketing activities they're interested in participating in—whether they're up for a video case study or a joint webinar, or they'd rather just provide a quick quote for a press release.

Some customer reference managers confess that they spend more than 50% of their time canvassing their sales teams for leads on customer advocates.

Speak to the right people

When a client hears the word 'interview,' they might rush to loop in a marketing, brand or PR spokesperson to speak with you. But interviewing the wrong person, who doesn't personally use your product or have a strong understanding of the use case, will lead to a weaker story.

To avoid a disappointing interview, do your research. Ask for an introduction to a relevant contact from your sales rep, or if you're already in touch with someone who you suspect might be the 'wrong person,' ask them to invite someone with direct experience with your product to fill out your questionnaire or hop on the phone interview. Whenever possible, interview multiple people in different roles at the organization to get the full picture.



Learn how TechValidate can help you create case studies automatically.

Get legal signoff first

Have you ever gone through all the steps in the case study process up to the point where you only need final sign-off from the customer—only to have them come back and apologetically say they can't actually endorse vendors? In a perfect world, the person you speak with would have their corporate legal policy memorized. But that's not often the case. Rather than risk wasting your time, just get sign-off upfront. You'll thank yourself later.

The easiest way to do this is to create a standard release form that can be drafted once and given to all subsequent customer references. See the example to the right to get an idea. If you do find yourself with a case study that can't be approved, not all is lost. You can always anonymize it by removing references to the company name and logo.

Click the release form above for a detailed example

Ask the right questions

For the most part, case study questionnaires can follow a formula. Organize questions by category (background, challenge, solution, and results) for the best flow. Make sure to use open-ended questions—yes or no questions won't yield the details you need.

To get the best story out of your interview, it's often necessary to tailor some questions to the customer. For example, if you aim to show prospects in the manufacturing industry how well your solution can work for them, then ask your manufacturing reference about the industry-specific challenges they face and how your solution has helped them be more successful within that space.

To help your customer prepare, send your list of questions over a few days before the interview. For help writing questions, use the sample questionnaire on the next page as a starting point.

Trying to decide whether sending a written questionnaire is enough or if you should schedule a call? In-person and phone interviews are the best route to get the most detailed responses and quotable testimonials. Plus, you can ask follow-up questions on the spot to clear up any points of confusion or have the customer elaborate.

Sample Questionnaire

Background

1. Please provide some background about your company.
2. What are your department's main objectives currently?

Challenge

3. What business or industry challenges were you facing that led you to look for a solution?
4. Were you using a different solution previously? If so, how was the solution no longer able to fulfill your needs?

Solution

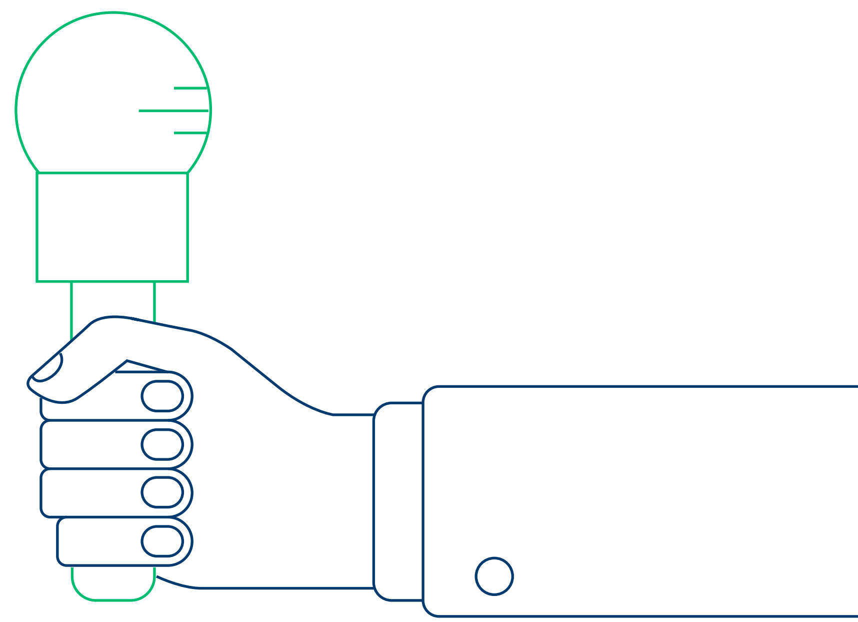
5. What requirements were you looking for in a solution? How were we able to fulfill those requirements?
6. Describe the implementation process – how long did it take, did you encounter any challenges, did you require assistance from our support team?

Results / Benefits

7. What benefits have you experienced from using our solution?
8. Do you have any business metrics that show a positive ROI, time savings, and/or increased efficiency?

2 Think like an investigative reporter

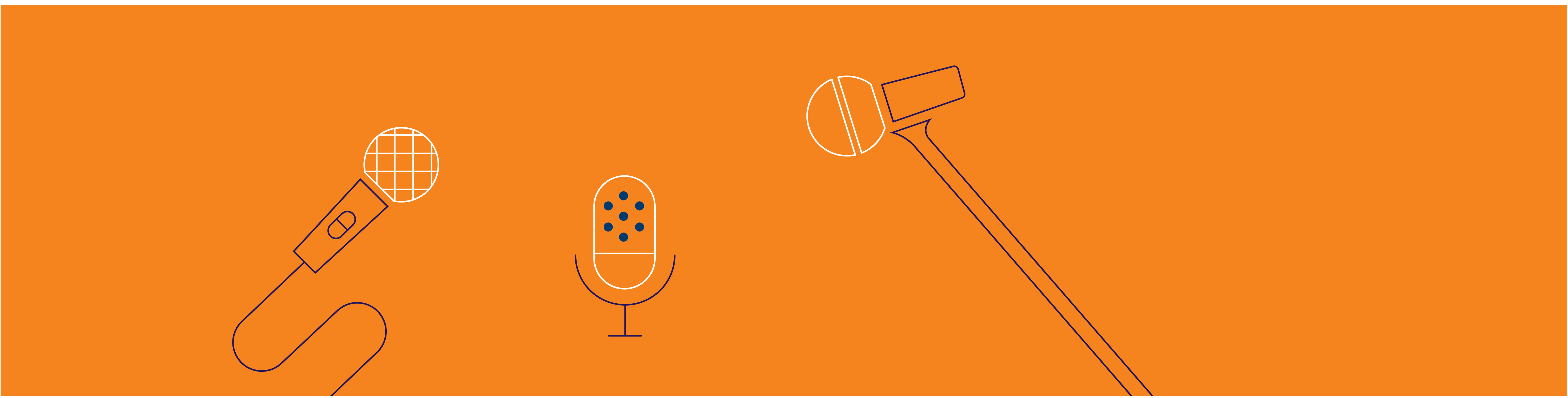
Maybe you didn't set out to be a professional writer, but you still need to write that case study. Luckily, there's a thing or two we can learn by taking a page from a journalist's playbook.



Record your interview

Working from memory or poorly scribbled notes isn't exactly a recipe for success. Even if you're an expert at notetaking, it's easy to get caught up in thinking of a perfect follow up question and then—oops—you miss the perfect sound-bite. On the other hand, frantically trying to write down every word makes it much more difficult to follow the conversation.

To take the pressure off and make sure you've got all the info you need to produce a shining case study, supplement your notes by recording the conversation using your web conferencing tool, a third-party app, or an old-fashioned portable audio recorder (bonus: you'll feel like a real reporter).



Don't bury the lede

Even prospects who are very interested in your solution can smell a boring case study from a mile away when your headline doesn't spark interest. If you can't capture the reader's attention in the first few lines, you'll no longer have a reader.

Don't be afraid to get a little creative with your writing. Focus on writing a compelling title, and make sure to open with the most important—and hopefully interesting—concepts in your introduction. Bullet points in the sidebar and within the text are useful to highlight and summarize key points.

Remember to place the spotlight on your customer – don't bore readers with tons of marketing fluff about your company. Instead, let the customer's story shine through and celebrate their success.

TechValidate customer spotlight

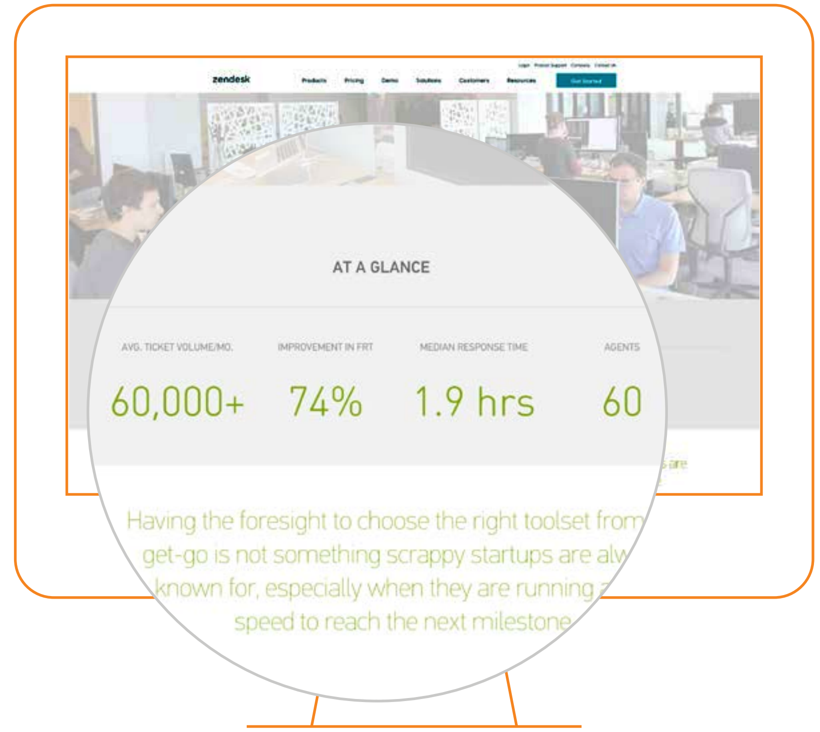
Check out the eye catching headlines Salesforce uses

View Salesforce's case studies →

Use quotes and concrete evidence for more impact

Any marketer can spin a sales pitch in their collateral, but if you can show that revenue grew by 95% while costs decreased by half as a direct result of using your product—now that's impressive. Numbers give factual context to anecdotal evidence, so whenever possible, sprinkle in some interesting stats, charts, or graphs.

But just as stats add concrete evidence to your story, quotes add compelling and relatable narrative. When it comes to quotes, it's actually best to take your journalism hat off. No need to write the customer's words verbatim—instead, take their concept and edit for clarity, grammar, and conciseness. Your customer will more than likely be happy you made them sound more articulate. As for how many quotes to include, aim for a minimum of one or two.



We love the way Zendesk highlights key stats at the top of each customer story

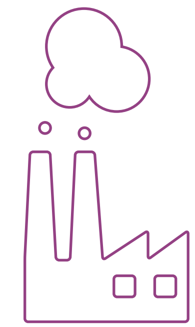
View web site →

3 Don’t let them gather dust

Your case study’s finished, but your job is just beginning. Promoting your customer stories through multiple channels, ensuring the sales team uses them, and refreshing your library as needs change will ensure your case studies have a real business impact now and in the future.

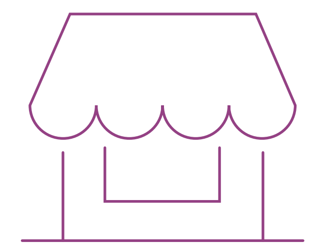
Stock your library with diverse company types, industries, and use cases

When a potential buyer browses through your case studies, will they find something that speaks to their unique situation? If not, your prospect may have trouble relating to your customer stories. And if they can't relate, they might not believe your solution can help them.



A good case study should establish your experience in their industry, demonstrate your knowledge of their specific pain points, and show proof that your solution can add value and provide results for their unique situation. If you're hoping to win the business of a healthcare company, you should serve them a healthcare case study. If your ideal customer uses your product for sales enablement, show them how a customer was successful in that application.

Aim to have a few case studies on hand for each industry, company type, or specific use case you serve. Every prospect faces unique challenges—show them you understand theirs.



Equip the sales team

If you've ever been inundated with sales requests for case studies, you know how important these assets can be in the sales cycle. Presenting a prospect with the right case study at the right time can be the difference that moves the needle to a sale.

As you build out your library of case studies, you'll want to keep them in a central repository where sales can easily find them. Otherwise you'll have a sales team desperate for customer stories and a bunch of case studies that aren't being used.

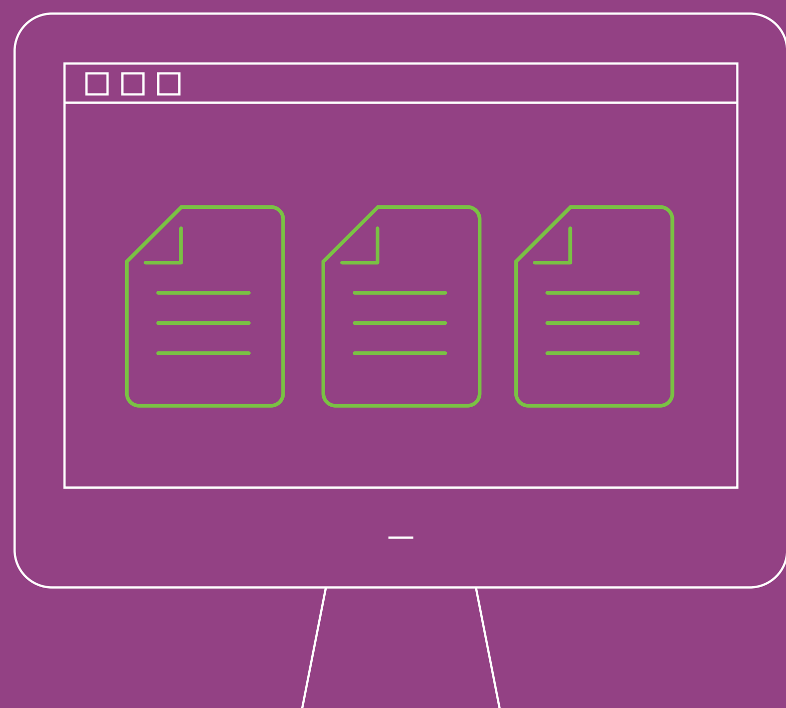
Here are just a few ways sales can leverage case studies for maximum impact:

- Spice up your sales slide decks with customer stories. Pull out attractive quotes and summarize the challenge, solution, and results in a few lines to add roof to your pitches.
- Include case study links in emails to prospects or have sales reps add them to their email signatures.
- Leverage your marketing automation tool, if you have one, to send case studies as part of your drip campaigns.

Help prospects find your stories

Today's buyers commonly turn to internet sources first—**67% of the buyer's journey is done digitally** so it's crucial to house your case studies where they'll be easily found.

Try adding a client showcase section to your website that's easily navigable from the homepage. You can also highlight a few key stories on your homepage, feature them in your blog, post them on social media, add them to your email marketing campaigns, and mention them in your newsletters.



Learn more about how TechValidate helps marketers generate case studies automatically using customer feedback.

Watch 60-second intro video

Request a demo