



TIP

Case Study Fundamentals

Case studies are a great way to show your business in action. Demonstrating what you have done for others builds your credibility, making it easier for potential clients or customers to see what you can do for them. We've compiled some quick tips to help you present your work effectively.

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General Reminders

1 **Keep your case study short.**

You'll want to keep your case study short. Use it to drive people to contact you for more information. You want the case study to start a conversation so that you can learn more about the person you are talking with and what you can do to be of use to them.

2 **It's not about you.**

It's natural to want to talk about all the things you can do for potential clients or customers. Fight that urge. We all face dealing with too much information. Your story should be about meeting specific needs. Everything else is just noise that detracts from your message.

3 **Commissioned photography can help make your case study more believable.**

A photo of your customer or client interacting with you or your business goes a long way toward making your case study real. While stock photography has gotten better, unless you buy the rights to the image, you still run the risk of seeing your photos appear on competitors' or others' ads or websites.

4 **Illustrations or diagrams can make difficult points easier to understand.**

Think of the clearest way to present what you have done; maybe a small diagram would work better than 350 words.

5 **Design your case study so that a quick glance gives a reader the whole story.**

If they want to take time to learn more, they can, but if you make the headlines and subheads bold and clear, a reader can learn what you've done in just a few seconds.

When Writing

Below are some simple guidelines that can help your case study be stronger.

- **Shorter is Better**

People have no spare time; be respectful of that. Keep it short, clear, and simple. A short, informative, emotionally appealing approach encourages a dialogue. Give them what they need to come to you with questions.

- **Clarity is King**

Being clear is hard work. Do the hard work. Would your 12-year-old niece understand it? If not, rewrite it.

- **Clear Headlines Save Time**

Headlines should speak directly to the benefit provided in as few words as possible. What did you do for your client or customer? How did you help them? Can you tell the story in just a few words?

The head and subhead should tell the whole story for those too rushed to read the whole thing.

You may want to write the headline and subhead after you've written the rest of the case study. It's a lot easier to summarize what you've already written than it is to summarize what you hope to write. Plus, you sometimes learn things as you write the case study that help you see what you did more clearly.

- **Start with Customer Needs**

It's about them, not you. **Your company's capabilities only matter to potential customers when they meet a need.** Begin your case study with a customer problem or desire—that's your challenge. Is there something they wanted to do that you helped them achieve? Define the challenge clearly. Make it particular so that the reality of it comes through.

You can use an employee, customer, or client quote if it helps make the emotional need behind the challenge more clear, but be sure to get their permission first.

Use only as much detail as you need to set up the situation and make it real and believable. You can even make a short list of client needs with a few bullet points.

- **Present Your Solution**

Once you have defined the problem, tell us how you solved it. This is where you tell the story of what you did. Remember to keep it short, and stay away from listing all the things you could do for a client. Speak specifically to how you solved the problem.

- **Present the Result**

Prove your solution worked. Use facts to support your emotional claims. Specific examples make it real and believable.

- **End with the Emotional Benefit**

Use another customer quote to show how you made a difference, and what that difference meant to them.

- **Call to Action**

Now that the story has been told, **encourage the readers to contact you with questions or to learn more about how you can help them with their specific needs**. It's all about starting the conversation.

There you have it! That is the basic structure of an effective case study. It is a story anyone can understand. It demonstrates what you do and how you helped in a believable way, and it shows that what you do is effective. A good case study informs your readers and motivates them to give you a call to help them with their business.