



Freund Associates
Technical Communication

The Case for Case Studies

Using Your Success Stories to Increase Business

White Paper

Where Value and Values Meet

As a business owner whose goal is to increase sales and generate revenue, you are constantly challenged to find new ways to capture the attention of your customers and potential customers. One of the most effective ways is by using a **case study**.

The Power of Stories

Above all, a case study is a story, a success story. And people love stories. Stories define who we are as a culture, a society, a community, and as individuals. The sustainability of your business—and your career—depends on creating revenue, which is why you need to tell your stories to your existing customers, as well as your potential new ones. You need success stories—stories of challenges overcome, problems solved, revenue generated, and money saved.

Use the power of your success stories to create case studies, and you can enhance your sales presentations and proposals by supporting your case with verifiable results. As a business owner, you know who your major customers are. You also know who you would like them to be. Very likely you also know about their business problems and how you can solve them, which is why you should have at least three compelling case studies aimed at persuading each of your major customers and potential customers to do business with you.

Testimonial vs. Case Study

A testimonial is a verbal or written statement of satisfaction, usually a sentence or two, from someone who has had a successful experience with your company's product or service. Testimonials are often hastily written, grammatically incorrect, and rarely subject to a review

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or editing process to make them as effective as they could be. Thus, it does not come close to the impact of a case study that is professionally written, designed, and presented to your customer. If your office is going to take the time and effort to solicit testimonials from satisfied customers, then you should also take the extra step and ask that customer be a part of your case study.

Develop Your Case Study

The best source of knowledge for a case study is a satisfied customer. Your customer's goal, however, is performing their job, not writing about it. Likewise, your priority should be building business, not interviewing, writing, designing, photographing, printing and uploading your case study. **Writing your own case study cannot be your job.**

Even if you are a business professional who also has the ability to write a compelling case study, you might think you would be the ideal person to document your successes. But you would be incorrect. Your interview with a satisfied customer would most likely resemble a conversation with your best friend and might be viewed as contrived





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and unconvincing. This is the reason you don't interview your best friend. You appoint a third party to provide the objectivity, credibility, and expertise you cannot.



Leverage Professional Expertise

To maintain your professional distance and to keep you focused on what you do best, you should strongly consider retaining the services of a full-service communication firm. For the purposes of this paper, we will use "Firm" to refer to the professionals—the interviewer, writer, photographer, graphic designer, printer, and project manager—that may be involved in the production of your case study. Hiring a Firm that is experienced in the art of telling success stories will save you the time, effort, resources, frustration, and ultimately, money, saving you the time and expense of managing multiple tasks and professionals.

For example, your major customers are likely accustomed to seeing and responding to professional documents and proposals. You need to be sure your case study has a strong visual impact and reflects your professionalism, which is why you need the services of a graphic designer. If you have a graphic designer on staff, then this should be relatively easy. If not, your Firm should accommodate your needs.

Likewise, you need a professional photographer to capture your subjects, as well as the products or services you're trying to market. Don't compromise the impact of your case study by

taking photos on the fly with the camera in your cell phone. If you have a professional photographer on staff, getting photos should be easy. If not, your Firm should accommodate your needs.

Finally, you will need to have your success story printed. Don't even consider printing your professionally created case study on your office inkjet printer. In fact, don't print it on anything less than a high-quality, color laser printer. Ideally, you should consult your print vendor, if you have one, to discuss paper type, stock, color and the remarkable advances in digital printing technology that make creating great looking personalized documents both easy and affordable. If you don't have a print vendor, your Firm should accommodate your needs.

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A compelling case study requires input from two primary sources: the satisfied customer and the person(s) at your company, hereinafter the “solution provider,” who made the favorable results possible. It also requires output from your retained Firm, whose professionals will conduct interviews with these primary sources. Your Firm will be sensitive to the time and demands of each source:



The Satisfied Customer

Usually very busy and often difficult to pin down for more than a few moments at a time, your satisfied customer or customers—there may often be more than one interviewee—will provide the primary information about your product or service, sometimes in terms incomprehensible to a lay person. An effective case study must translate material into language that can be understood clearly by your target audience: your existing and potential customers.



The Solution Provider

Usually busy because of their many responsibilities, solution providers will be happy and flexible enough to make the time to be interviewed, as the company will directly benefit from the new business that may be generated by the case study. Still, your Firm must be sensitive to solution provider’s time constraints and professional responsibilities.

The Case Study Formula

The formula for writing your case study comes down to answering 5 basic questions:

- 1 What was the problem your customer was trying to solve?
- 2 What was the solution to the problem?
- 3 Who benefited or will benefit from the results?
- 4 How did your product or service help solve the problem?
- 5 How can the results be quantified or “dollarized?”

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Length of Your Case Study

The ideal length for a case study should be both sides of a standard 8.5" x 11" page, including photos. Interviews may be as long as 30 minutes for each source, longer if there are technical details and specialized terms involved. If this is the case, it is important to include definitions of these terms. There are also source-specific questions designed to solicit answers that will make effective direct quotations. Understand that the following are general questions whose answers will generate more specific follow-up questions. Your Firm should know how to extract the necessary information from each source quickly and concisely.

Satisfied Customer Questions

- What is your full name?
- What is your title? Key responsibilities?
- How long have you been at this position?
- What was the problem that you were trying to solve?
- What obstacles did you encounter along the way?
- How was the obstacle overcome?
- How did the solution provider's solution help achieve your goal?
- How much money, time and effort did the solution provider save you?
- How much money, new business, or other positive results (media exposure, customer satisfaction, new product lines, etc.) did the solution provider help you create?
- What might you tell others about the solution provider's product or service?

Solution Provider Questions

- What is your full name?
- What is your title? Key responsibilities?
- How long have you been at this position?
- How did you first come to meet the satisfied customer(s) and learn about their need(s)?
- Why product or service was the right one for the satisfied customer and why?
- Were there any unique challenges or unusual obstacles that had to be overcome in delivering the product or service?
- How long did it take to implement/performance the satisfied customer's solution?
- Were there any other issues or circumstances that made this success story remarkable?



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Monetize Your Case Study

Your completed case study will create a powerful first impression, one that will make a compelling statement for its readers. You can feel confident in approaching your customers with a documented, persuasive record of your successes. Make case studies an ongoing part of your proposals, marketing programs, and e-mail campaigns. The sustainability of your business—and your career—may depend on it.



About Freund Associates Technical Communication

Freund Associates is a full-service communication firm specializing in technical and medical writing for business and industry. Founded in 1996 and located in northern New Jersey, Freund Associates is a certified woman-owned business that provides a tightly organized team of writers, editors, graphic designers, new media specialists, engineers, and project managers to serve clients anywhere in the United States.

Our approach to medical and technical writing can save you time, money, and worry. Freund Associates will:

- Simplify your project by providing a single point of contact. No need for you to coordinate multiple writers or resources.
- Work with you to define the project, including audience, objective, scope, message, deadlines, and optimal media for delivery.
- Approach every project with knowledge of your industry and the ability to meet your specific communication challenges.
- Arrange and conduct teleconference calls or meetings with your in-house subject matter experts.
- Supervise your entire project and thoroughly review all work to ensure consistency of tone, format, and style.
- Deliver a high-quality product—on time and on budget—that can proudly bear your company name.

▶ To take the next step in telling your success stories with case studies, visit www.freundassociates.com, call **Dr. Annette Freund** at 201-512-0022, or email her at afreund@freundassociates.com.

Steps to a Successful Case Study at a Glance

- 1 Contact the satisfied customer and solution provider to get their cooperation and let each know they will be contacted by your Firm to be interviewed.
- 2 Authorize your Firm to contact each source directly to schedule a telephone call or in-person interview.
- 3 The Firm conducts and transcribes all interviews and creates a written document.
- 4 The Firm writes the “story” that becomes the body of the case study.
- 5 The case study goes to you and your Legal Department (if required) for approval and sign off.
- 6 Requested changes, if any, are returned to the Firm and integrated into a template that has been designed specifically for the case study.
- 7 A revised and completed draft containing words and images is sent to you along with printing recommendations and specifications.
- 8 The Firm makes final changes, if necessary, and sends the approved document with printing specifications to the printer.
- 9 The Firm delivers copies of the case study to you, which can be presented to customers and potential customers.
- 10 An electronic version (PDF) is uploaded to your company’s web site.