

Making Your Case: A Guide to Compelling Customer Case Studies

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I recently took a stroll down memory lane—and tripped and fell. The occasion was a look at some of the first customer case studies I ever wrote, way back in 1992. Rereading those pieces, it turned out, was not exactly a pleasant excursion—more like visiting an embarrassing relative. I was relieved no one else would have to sit through a visit with Crazy Uncle Frank.

Which begs the question: What's improved my case studies since then? Simple—I pay someone else to write them. As a busy marketing manager, I often delegate case studies to contractors. But I do still write, and my writing has strengthened with both age and regular exercise.

Over the years, I've developed a handy four-step guide to strong case studies, which I share with each of our junior marketing managers.

Step One: The writer is the key.

It seems obvious—find a writer with strong writing skills. Sadly, many people who bill themselves as “professional writers” are neither professional nor very good writers. Look for someone who writes clearly without marketing jargon or esoteric language, someone intelligent who can grasp complex concepts quickly. Ask for writing samples. Provide a transcript from a customer interview; from it, ask candidates to write an outline and three introductory paragraphs. If you lack the skills to judge strong writing, ask a colleague you trust to review the material. An important corollary: never overestimate experience. Industry expertise is a bonus, but not the critical component. I can always teach a smart writer about my company's technology, but I don't have time to teach an industry expert how to write.

Step Two: Tell a story.

I encourage my writers to write professionally and artfully, to capture the reader's attention and hold it. Truth be told, chances are good that your audience will read the first paragraph and skim the rest. Yes, you can mitigate this tendency by highlighting important content up front. But you can also combat it altogether with a straightforward yet compelling story.

A typical customer storyline follows the classic plotline: challenge, solution, result. In the first section, create drama by showing how difficult your customer's situation was before the solution, then relate that to the fears and challenges faced by your target audience. Next, explain how your company helped relieve the pain. I have read (or skimmed) far too many case studies that rambled on, laying out step-by-step technical minutiae without a hint of narrative. In contrast, a good writer will be able to construct a good story, if you have one to tell.

Step Three: Prove it, Mister.

Too many case studies offer no proof of a product's benefits. Many customers, particularly government agencies, aren't willing to measure success. For-profit companies, meanwhile, can be reluctant to publish the details of their successes, which they see as offering competitive advantage. In one case, a

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customer told me that he didn't want to share the fact that our software had reduced his costs dramatically. He feared that the information would lead customers to demand lower fees.

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With these customers, my advice is simple: forget 'em. Nothing is quite as pathetic as an argument without proof. Find a customer willing to provide strong metrics that demonstrate the benefit of your product or service. How do you convince a customer to do that? Well, that's another post. In the meantime, visit resources like the [Customer Reference Forum](#) for tips and tricks.

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Step Four: Nix the empty promotion.

A quote like "XYZ is the best solution in the world" will do you more harm than good. In contrast, "This machine lowered our printing costs by 27%" is far better. Quotes are the dialogue of your story. If they seem forced or wooden, readers will understandably begin to doubt everything you say. My tip: read each quote aloud to yourself. If it doesn't sound like something someone would actually say, rewrite it. It's fine to do so as long as you build in customer approval for any changes. Customers want to sound natural and articulate. If the language is to promotional or falsely effusive, readers might start wondering what kind of kickback you offered for such an over-the-top effusion.

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You can't make a silk purse from a sow's ear.

A final caveat: this guide applies only to the fortunate few who have happy customers. A marginally satisfied customer with no significant successes to showcase will not make a strong reference. Do your research and find one with a compelling story to tell.

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And beware the salesperson who recommends a customer for the wrong reasons. The contact could be too junior to serve as a reference. Or maybe the salesperson hopes that choosing a particular contact will improve client relations and increase quotas. Ask the hard questions. Accept no less than a willing and enthusiastic customer, a compelling story, and the metrics of success. A talented writer can spin that combination into gold.

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So much of business involves resolving customers' problems. With case studies, you get to work with delighted customers. And a compelling series of success stories can make you a hero to the sales force. Now go find those stories and spread the word.

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