



Your Guide to Creating  
Compelling Case Studies  
That Drive Sales

# Case studies are an effective tool for generating new business. >

When done well, they can give prospective customers the confidence they need to partner with you. They can provide real-life examples of not just how your products and services work, but also the benefits they can bring.

In fact, according to Demand Gen Report's 2017 Content Preferences Survey, 78 percent of B2B buyers have used case studies to inform their purchasing decisions over the past year.<sup>1</sup> That's more than any other content type and up from 72 percent in 2016.

Yet to be effective, case studies need to be compelling. They have to tell a story that resonates with your audience, speaks to their specific situation and needs, and conveys a sense of value and security. To achieve that, you'll probably need to interview key stakeholders, both from your business and your customer's, to accurately chronicle what happened.

While writing a case study isn't hard, creating one that strikes a chord with your audience and actually helps drive sales, takes some finesse. To help, let's take a closer look at how to create effective case studies that will close more sales for your business.

<sup>1</sup> "2017 Content Preferences Survey Report," Demand Gen Report, 2017.





## The Basics: How to Structure Case Studies

Some case studies consist of just a few short bullet points or a single paragraph. Others go on for pages. No matter what length you're targeting, the trick to getting case studies right is to provide enough information to make them informative and interesting, without bogging readers down in unnecessary details. We recommend a target length of between 500 and 750 words (or the equivalent of a roughly 2-3 page layout) so that it's substantive, while still a quick read.

As you think about the case study you're going to write, remember that it needs to contain the following elements:

## 1 A compelling headline

Pique your reader's interest with a headline that's concise, pithy, and has a hook. For example:

- > How "Company A" Used "X Solution" to Build an Award-Winning App in Record Time
- > "Company B" Saves \$1 Million a Year After Switching to "Y Product"
- > Better, Faster, Cheaper: How "Company C" Doubled Sales in Six Months

Whenever possible, try to communicate — or at least hint at — the value that your customer derived from working with you. Using numbers or stats that show ROI can be an effective way of doing this. If you don't have any available, then try to figure out the most compelling way possible to describe what happened.

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## 2 A short synopsis

Now that you've caught your reader's eye, you need to reel them in with a short summary of the key points of your case study. The idea here is to quickly summarize what happened, making it sound as engaging as possible, so that your readers want to keep reading. Here's an example that plays off of the first headline suggested above.

*"Company A" realized it needed to upgrade its legacy software applications, and that it needed to do so fast. Not only were its existing applications outdated and difficult to use, they made the business less efficient. Fortunately, "Company A" discovered "X Solution." Together, they built a suite of new applications in just three months that exceeded expectations, helped the company streamline operations, and that were even recognized with an industry award.*

Keep your synopsis to no more than 75 words. Remember, it's just a teaser and doesn't need to include every detail.

### 3 A body that answers four main questions

No matter how long (or short) the body of your case study is, it needs to answer four important questions:

- **WHAT WAS THE PROBLEM YOUR CUSTOMER FACED THAT YOU HELPED SOLVE?** Describe the problem, highlighting whatever implications it had for the business. You want to make your customer's pain points clear, and describe any steps they used to solve the problem on their own before turning to you for help.
- **WHY DID THE CUSTOMER CHOOSE YOU TO HELP?** You could devote paragraphs answering this question, but more likely than not you'll be able to do so in a sentence or two. The purpose here isn't to brag about how great your company is, but rather to identify a couple of differentiators that led your customer to choose you.
- **HOW DID YOU ADDRESS AND ULTIMATELY SOLVE YOUR CUSTOMER'S PROBLEM? WHAT STEPS DID YOU UNDERTAKE?** Was there a lot of hands-on involvement? Explain what happened, calling attention to any potential concerns you know prospects might have, and how you addressed them with this particular customer.
- **WHAT WERE THE RESULTS ACHIEVED? WHAT HAPPENED AFTER THE CUSTOMER IMPLEMENTED YOUR SOLUTION?** Try to include both quantitative and qualitative results to show the impact. If you don't have any tangible results that you can share, then maybe you need to ask yourself if creating a case study makes sense.

With these elements in place, it's time to wrap things up.

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### 4 Conclusion

Your conclusion should be short and sweet. Since case studies are generally shorter documents, you don't want to rehash what you've already said. Instead, talk about the overall impact your product or solution had and how that's helped the business. For example, if you've cited a 20 percent increase in efficiency, as a direct result of using your product, how is that in turn affecting things like productivity and sales?

Your conclusion is also the place to insert a relevant CTA, such as where your readers can go to learn more about you or a link to another related case study.



## Other elements to include in your case study

You should also consider adding the following elements to your case studies:

- **LOGOS.** You may want to include your customer's logo in the design of your case study, so make sure to ask for a high-resolution version or find one online yourself.
- **PHOTOS.** High-quality images can go a long way toward bringing a case study to life. It might be a picture of the team involved in the project, the final outcome or product, or just a headshot of the person your case study quotes. Whatever the case, try to find some visual elements that you can use to enhance the overall look of your case study.
- **CALL OUTS.** Do you have a lot of numbers in your case study? If so, why not create a "By the Numbers" call out that lists them all in one place. The idea is to look for other ways to break up your case study so that it's easier to scan and more visually engaging. Selectively using pull quotes is another great way to do this.

Each of these extra elements can go a long way toward making your case study seem more polished and professional.

# Beyond the Basics: Credibility and Storytelling

To be effective, case studies need to be credible. There are three main ways to ensure this:



## 1. Incorporate the voice of your customer.

Include first-person accounts and testimonials of what the company experienced while using your product or service. Make sure you get permission to use any testimonials you want to include, and always attribute them correctly, noting the name and title of the relevant person. And remember that more often than not, the best way to get testimonials is to ghost write them for your customer, rather than asking them to come up with something on their own. That not only makes the process easier for your customer (who then simply has to edit and approve what you've written), it also helps ensure that each testimonial focuses on the most important points.

Including a testimonial or two from a relevant stakeholder from inside your business can also help further personalize the case study and build credibility.

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## 2. Create a well-written, clear, and concise document.

As with all of your external content, make sure your case study is well-written, clear, and error free. This is especially important with case studies because you're not only representing your brand, but also *your customer's* brand. And, if that representation contains errors, typos, or other quality issues, you're associating your company and your customer's company with that poorly written content. Make sure you have a system in place to adequately review your content before you publish it, whether that involves human editors or some form of optimization technology.

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### 3. Show tangible results.

We touched on this earlier but it bears repeating. While stating what you did is important, it won't get you very far unless you can also explain the resulting impact. While qualitative results are great (we increased sales, customer satisfaction went up, etc.), quantifying those results is even better. By what percentage did sales increase? How much higher is customer satisfaction now than it was before? Numbers can go a long way toward demonstrating tangible ROI, which in turn builds credibility.

And while credibility is certainly a top priority, to really ensure that your case study resonates, it needs to do more than simply relay facts. It has to tell a story. Practically speaking that means:

- Making the case study relatable by putting it into the appropriate context so that your readers identify with it.
- Ensuring that you have a strong narrative and adopt a conversational tone of voice.
- Incorporating the elements of any good story: strong characters trying to overcome a challenge, ups and downs along the way, and a satisfying resolution.

If you can wrap your case study into a compelling and credible story, you're all but guaranteed to create a highly effective piece of content.

## Final Thoughts

As with any piece of content, a bit of planning goes a long way. Figure out what the key messages are that you're trying to tell and then talk to the right people to get the details you need to craft them into a story. And make sure that you always share a draft of the case study with your customer before publishing it. They need to be able to review, edit, and approve it before it's made public.

Ready to write your next case study? The worksheet, suggested interview questions, and checklist on the following pages will help get you started.



# Case Study Worksheet

Use this worksheet to gather the information you will need to create your next case study.

<b>Customer name</b>		
<b>Customer description or boilerplate</b>	<b>Names and titles of everyone you plan to interview and/or reference</b>	
<b>Challenge that the customer faced</b>	<b>Reason the customer chose you over your competitors</b>	<b>Solution that you provided and how it was implemented</b>
<b>Results achieved (both qualitative and quantitative)</b>		

# Case Study Worksheet

**Noteworthy implementation challenges and how they were overcome**

**Any other points to highlight**

**Customer quote(s)**

**Internal quote(s)**

# Recommended Interview Questions

Use these questions as a starting point for your interviews with the stakeholders you're talking to.

## **For Internal Interviews**

- What problem was the customer facing when they came to us and what were the implications of that problem for their business?
- Do you know why the customer chose us and not one of our competitors?
- What exactly did we do to solve the customer's problem?
- How long did it take and what was the outcome?
- Can we quantify the results in any way?
- Is there a particular angle that you think is worth focusing on with this case study? Is there a particular aspect of our product / solution / approach that we should highlight?
- Is there anything we haven't covered that would be worth including in this case study?

## **For Customer Interviews:**

- How would you describe the problem you faced before working with us?
- What implications did that problem have on your business?
- What, if anything, did you do to try to solve the problem?
- What led you to choose us to help you?
- What success factors were you hoping to achieve?
- What were your impressions of working with us / of our product / of our service?
- What have the results been since working with us?
- What metrics can you share that reinforce the results you've experienced?
- Is there anything we haven't covered that would be worth including in this case study?

# Is Your Case Study Ready to Publish?

Think you're all done? Double check that you can answer yes to all of the questions below.

- Do you have a compelling headline?
- Is your synopsis concise and does it draw the reader in?
- Does the case study tell a story?
- Is it well written, concise, and clear?
- Does it explain why the customer chose you?
- Does it adequately describe the problem the customer faced and its related pain points?
- Does it include tangible results?
- Does it include testimonials?
- Have you spelled people's names right and used their correct titles?
- Is it between 500 and 750 words?
- Do you have copy of the customer's logo?
- Is the case study visually appealing and easy to scan?
- Have you shared a copy of the case study with the customer and received their approval?

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