Marketing Tips

5 easy steps to get your case studies rolling

Customer case studies help in building confidence with prospective buyers. However many companies stumble at getting their case studies right. This document talks about 5 easy steps that get your case studies rolling and leverage them as effective marketing assets at your website and in your campaigns?

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Step 1 – Capture data through interviews

When creating a case study, it is important to capture key parameters about the engagement through a detailed questionnaire. This can be directly through customer interviews or discussions with the primary client contact at the vendor end. Capture data in 3 distinct sections

- What were the **challenges** that the company was facing because of which they started evaluating a solution like what your company offers. This will form the business challenge/Need section
- Details of the elements of the **solution** that were interesting for the client. Some details about specific customizations/configurations that were needed at the client end to make the solution successful. Salient points about the solution implementation.
- **Benefits** that the client could derive based on the implementation. These should typically be measurable business benefits.

Step 2 – Organize content along messaging themes

The content that you would have generated might be along multiple dimensions. It is important to start organizing it along the main messaging themes that the organization has laid out for its products/services. This will ensure that every piece of collateral that is designed adds value to the primary messaging themes identified.

Defining a standard design template helps provide all the case studies a common look n feel. While designing, make sure that you follow your brand design guidelines.

Step 3 – Populate marketing artifacts

The case study could take multiple forms, could be a presentation, and could be a PDF flyer. Populate the content across the chosen artifacts so that it becomes a usable marketing asset.

Step 4 – Validate with client

The content that you created also makes a mention of your client. It will definitely need an approval from their teams. Several times, in order to highlight the benefits of the solution/product, the situation at the client is portrayed in a negative light. This will create problems in getting approval from the client. Using neutral situations and making forward looking statements are usually a better option than to portray the client in a negative tone.

Step 5 – Publish and propagate

Publish the final form of the case study. Make sure that sales teams and other customer facing teams are informed about the availability of this piece of collateral. Use it in your online campaigns, newsletters, link it in your blogs and make sure that the content gets propagated.

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