

Writing Case Studies Using the Reader-Centered Approach

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Case studies are a highly-effective selling tool for your products or services. You take a success story where your company's products or services provided a successful solution for one of your clients -- and write a 1-to-5 page summary of how you were able to solve your client's problem. In doing so, you demonstrate the value and effectiveness of your products or service solutions.

Potential clients are hungry for this kind of information. A success story with a previous client provides evidence of the value of your products or services. The potential client wants to know how your products or services can solve *their* problems as well. A case study may make the difference in convincing a potential client to do business with you.

That's why it's best to use a Reader-Centered Approach to write your case studies. With this approach, you write your success story from the point of view of the *reader* -- that is, the potential client -- who will read the case study.

What Is Your Market?

First, define your market(s) for the case study. Which customers, in which markets, are you trying to impress with your success story? Will your case study be a general case study about your work for a large, high-profile company or organization? Or will your case study target customers in a specific market, or sub-set of a market?

It's important to have both kinds of case studies. General case studies show the versatility of your company in providing solutions to different, high-profile industries, hospitals, universities, government organizations, etc. Market-specific case studies let you target potential customers within those same markets.

Once you have defined the markets for your case study, select a success story for a client company that appeals to those markets. For example, if you are targeting high-tech customers with your case study, select a success story where you provided a solution to a high-tech client.

Who Is Your Reader?

What position will your reader hold at the company where they work? Are they the CEO? The CFO? The Chief Technology Officer? The Director of Business Operations? The VP of Sales and Marketing?

Ask yourself, who have you dealt with in the past? Look at the client company that is the subject of your case study. Who did you work with there? Which executive or manager made the first call to engage your company? Who made the decision to buy? These same kinds of executives and managers at other companies will be the people who will read your case studies.

One trick I've learned is to go to your client company's web site, and read the short biographies of the executives and managers that you will mention in the case study. It's probable that readers of your case study will have similar backgrounds, duties, and responsibilities.

What Does Your Reader Know?

How familiar is your reader with the basic concepts of your products or services? What do they know about the solutions you provide? What do they NOT know? How much will you need to explain to them?

If your readers are familiar with your products or technology, you probably won't need to explain the basic concepts. You can focus instead on the technical features of your products or services, and how those features provided benefits to the client company.

If your readers are CEOs or other executives, they will be focused more on the "bottom line" -- the problems you solved for the client, the cost savings, ROI, TCO, etc. You don't need to go into too much technical detail. But be wary of assuming that a CEO or other executive automatically understands your products or services. You may need to explain some basic concepts to them.

Once, a high-tech executive returned a case study draft to me with a section crossed out. He added a margin comment: "We don't need to explain this. Everyone already knows this part of the technology."

I wrote back to him: "Everyone in *your industry* knows this part of the technology. But we are targeting your high-tech solutions to business CEOs, real estate executives, and hospital boards. They have no prior knowledge of this technology. Therefore, we need to explain the concepts to them."

Anticipate Your Reader's Questions

A case study should answer specific questions that your reader may have about your product or service. As an example, say you are writing a case study for a network software product. The reader may have the following questions:

- How is this software product installed on a company network?
- How will the features of this software help our employees to do their jobs better?
- What kinds of benefits can we expect from using this software product?

You can easily adapt these questions into an "interview questionnaire," to use when you interview the people at the client company that is the subject of the case study. For example:

- How was the software deployed on your company's network?
- In what ways did your employees use the specific features of the software? What tasks or goals did they accomplish through the software?
- What benefits did your company experience from using the software? (Increased productivity? Faster time-to-market? Etc.)

Tell Them A Story

The information in a case study should not be a bland listing of facts and bullet points. The reader is looking to see how your products or services work in a "real world" scenario. Therefore, as you write the case study, you want to tell the reader a story.

The trick here is to keep the story focused on the client company. You want to focus not on the various features of your products or services, but on *how those features were used to the client's benefit*. How were the features employed to help the client company achieve their goals? What tangible benefits did the client company receive as a result?

Describe how individual people or departments at the client company made use of your solutions. Use real names if you can; or, if not, use titles like "the Director of Product Management." The more personal you make the case study, the more readers will begin to trust that your solutions can help their company as well.

Organize for Maximum Effect

Organize the information in your case study into sections according to a basic template. This allows you to present the information in a logical format, so that the reader can follow the story and understand how your solution worked.

Use headings and sub-headings to guide the reader through the various sections. The template I use for a case study is:

- **Company Overview** -- A short description of the client company.
- **The Challenge** -- The problems that the client company faced before they employed your company's products or services.
- **The Solution** -- The product or service solutions that your company provided to the client company.
- **Key Benefits** -- The key benefits that the client company received by implementing your solutions.

The final section, "Key Benefits," should be divided up into four or five sub-sections, with one or two paragraphs each that examine each benefit. Examples of the sub-sections for "Key Benefits" might include:

- **Increased Productivity**
- **Lower Production Costs**
- **Easy Tracking of Production Data**
- **Faster Time-To-Market**

Use Illustrations, Photos, Graphs, and Quotes

Whenever possible, illustrate concepts in your case studies using illustrations and photos. Use graphs to provide statistics and analytics on the effectiveness of your solutions (i.e. increases in sales, etc.). Readers appreciate visual input to help them understand concepts and benefits, and to break up the large blocks of text they have to read.

Also, be sure to highlight quotes from executives at the client company who describe and praise the effectiveness of your solutions. (Example: "*Acme Company's solution allowed us to reduce our time-to-market by 66%.*" -- **Ron Jones, VP of Operations.**) A good place to put these quotes is in text boxes in the left-side margin of the case study, so the quotes are highly visible to the reader.

Give Them the Numbers

Readers are looking for statistics. They want some idea of how effective your solutions have been for other client companies. Some common statistics to use in your case studies include:

- Increases in productivity
- Time and cost savings
- Decreases in waste and unnecessary expense

- Return on Investment (ROI)
- Total Cost of Ownership (TCO)
- Increased sales or revenue

Provide an Abstract

Provide a one-paragraph abstract at the beginning of each case study. This makes it easy for the reader to find out if the case study relates to a client company similar to theirs. Also, a short abstract may attract the reader to read the case study, especially if it concerns solutions your company provided for a well-known, high-profile client.

Also, be sure to print the case studies on a company letterhead that includes the company's address, web site URL, and phone number.

Think Outside the Company

The most important thing in writing a case study is to put yourself in the place of someone outside your company. You want to write the case study from the point of view of a reader who is not familiar with your company, and who wants to know how your products or services can solve their problems and help them achieve their goals.

It's not always easy for people inside your company to see things from the perspective of the potential customer. That's why it's sometimes better to have a professional writer to write your case studies for you. A professional case study writer has a better view of things from outside your company. They can see your company from the point of view of the would-be customer, ask questions that a would-be customer might ask, and write a case study to answer those questions.

AUTHOR BIO

Robert Lindsay is a freelance business writer and technical copywriter. He has written case studies and other marketing and communications materials for software, IT, and network technology companies, telecommunications companies, industrial manufacturers, construction and engineering companies, medical research firms, and healthcare organizations.

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