WHITE PAPER

Capturing Case Studies that Captivate

How to unearth the telling details that grab potential customers' attention and inspire them to take action

Goldberg Communications

Executive Summary

Case studies are among the most popular types of B2B content. But they only live up to their potential if they're packed with telling facts that grab potential customers' attention. This white paper describes a process you can follow to help ensure you get all the details you need to produce an engaging customer success story that inspires prospects to take action.

Why Case Studies Pack a Punch

Year after year, case studies are among B2B marketer's favorite content-marketing tactics. The B2B Content Marketing 2014 Benchmarks, Budget and Trends—North America[1] report found that 73% of content marketers take advantage of case studies.

And with good reason.

Stories are among the most memorable types of content you can produce. Stories are powerful because they provide context missing from abstract prose. They present information in a manner that's more lifelike and true to day-to-day existence. As someone reads a story, he or she actually reenact the situation in their head. Reading a story is the next best thing to doing something yourself.

By producing a strong case study, about a real customer with characteristics similar to your prospect, you help your prospects actually put themselves in the shoes of a real customer. They can feel what it's like to face their challenges and to take action to solve them using your product or service. Reading such stories can inspire prospects to want to take similar action to solve their own challenges.

The Elements of a Good Business Story

How do you know what makes for a good story? You don't need to figure it out from scratch. You can simply follow plots that have been proven effective.

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[1] http://www.iab.net/media/file/B2BResearch2014.pdf

In fact, marketers only need one plot for business stories. In the book “Made to Stick” the Heath brothers call it the “challenge” plot. In the challenge plot, the protagonist overcomes a formidable obstacle and succeeds. Think David and Goliath.

Now these challenges don’t need to be life and death. The only prerequisite is that the obstacles seem daunting to the protagonist. These stories inspire us by appealing to our perseverance and courage. They make us want to work harder, take on new challenges, overcome obstacles. And most important from a marketing perspective, challenge plots inspire action.

Challenges in Getting the Story

Business stories have the potential to pack a lot of power in supporting your sales efforts. But only if your story is well executed. It needs to fully describe the business challenges the customer faced, how they used your solution to solve their problem, and the business benefits they achieved by doing so.

Yet, one client recently confided to me that her company, which makes complex technology, was having considerable difficulty finding freelance writers who could “get” the story. The writers either didn’t understand the business issues the customer was facing. Or they failed to follow up and get the technical details and the solution messaging right. She asked me what process I followed to produce case studies for technology companies. My response to her was the inspiration for this white paper.

A Recipe for Impactful Case Studies

My process centers around carefully defining what I’ll need from my interview with the customer and then having a real-conversation with them that encourages them to tell their story in their own words.

Assembling the Ingredients

I start with a list of ingredients I’ll need to gather to create a customized questionnaire for each one of my customers. These components include a high-level outline, messaging for the vendor’s solution, and a list of ROI metrics I’ll need to gather.

The High-Level Outline

I start with a standard outline for most customer stories that gives me the 30,000 foot view of what my story will have to cover. This outline will include:

- The protagonist—In this case the customer. Who is the customer? What do they do? Why are they interesting?
- The challenge—What was the business challenge the customer faced that caused them to consider your solution? This challenge should tie into the customer's overall goals for their business—often driving revenue, reducing costs, improving the customer experience, or enhancing regulatory compliance.
- How they found your solution and why they chose it.
- Optionally, the implementation—Case studies meant for use in later stages of the sales cycle generally include a discussion of the implementation. Case studies for early stages of the sales cycle don't typically talk about the implementation unless it's important for a particular vertical market. For example, healthcare providers are particularly interested in ease of implementation because physicians tend to be very resistant to any inconvenience that a technology implementation might cause.
- How the customer used the solution to overcome their challenges.
- Benefits achieved from using the solution.

Messaging for the Product of Service to be Featured

Now I'll look for any background knowledge I need to flesh out various parts of the outline. For starters, I need to understand the vendor's solution and the messages the vendor wants the customer to convey about the product. While you don't want to put words in the customers' mouth, it's important to understand the vendor's messaging to remind the customer about any key points they may have failed to recall.

Questions to ask about vendor's products or services include:

- What is product/solution?
- What does the product/solution do and how does it work?
- What are the solution's differentiators? What makes the product or service unique?
- What are the key benefits of the solution?

A List of ROI Metrics to be Gathered

One of the most valuable components of any customer success story is the quantifiable results the customer is able to achieve. These validate that the vendor's product delivers on its claims. Before a writer interviews the customer, vendors should lay the groundwork for a strong ROI story by doing the following:

- Have their sales force or support team work closely with the customer to help them identify opportunities for ROI. For example, one health-IT vendor works closely with its physician customers to explore all the ways the solution delivers a return. Areas they look at with their customers include time savings due to eliminating the need to pull and file paper records, reduced costs for medical charting supplies, lower transcription costs, and increased revenues through the ability to more accurately code patient visits.
- Provide the writer with a list of metrics that are important for your company to report on. For example, a workforce management product can reduce labor costs by allowing managers to more effectively schedule the workforce and eliminate the need for overtime. The vendor might want the writer to ask the customer about these overtime cost reductions.

Crafting the Questionnaire

With the high-level standard outline, the messages you want to convey, and the metrics you hope to obtain, you now have everything you need to put together a questionnaire for the interview. These questions follow the high-level outline but provide opportunities to drill down where necessary for more information. For example, I typically ask about:

- Relevant company background.
- What was the challenge the customer faced that caused you to consider the vendor's solution?
- What process did you follow to make your selection and why did you chose the vendor?
- How the customer uses the solution. Here's where I'll incorporate the information I learned about the company messaging to develop specific questions.

- Quantifiable results. Again, I'll ask about all the metrics the vendor thinks their solution can improve to make sure we've covered all the bases.

Conducting the Interview

Although I do extensive preparation for interviews, I may or may not go through all the questions in order when I actually talk to the customer. The list of questions is merely a reference to make sure that I've covered all the bases by the end of the interview.

Ideally, the interview itself should be a conversation. Customers should tell their stories in their own words because those words are far more powerful than generic marketing fluff. To that end, I start off by asking open-ended questions about the customers' business challenges and the benefits they achieved through their use of the solution.

I give the customer plenty of time to answer in their own words by continually asking, "Is there anything else?" and being quiet to encourage them to speak more.

Only when we've exhausted all their ideas will I go through my list of questions to make sure we've touched upon everything my client deemed important.

Leaving the Door Open to Follow Up

There's always the chance the despite my best efforts, I'll need to follow up on something said in the interview. At the end of each interview, I always ask the customer for permission to get back in touch. I'll then write a rough draft and see if anything's unclear or missing. If so, I go back to the customer and ask any additional questions.

Take Your Case Studies to the Next Level

The process I just outlined will cover the requirements for most technology vendors who wish to create the standard one page (front-and-back) case studies. However, some companies are beginning to talk about the idea of "brand journalism." Brand journalism seeks to use more of standard journalistic techniques to make customer stories even more engaging and compelling.

Brand journalism takes advantage of two techniques not generally used in standard case studies. It brings more human-interest elements into the story. Instead of simply talking about the business challenges for the company, a brand journalist will look focus on the particular person who faced this challenge and what it was like to walk in their shoes. How did the challenge affect them personally? Was there a computer crash that literally woke them up at night? How did they feel about it? Where were they sitting in the room when they realized they needed a solution? By incorporating these types of details, the reader can more readily empathize with the customer and the story will be more memorable.

Brand journalism strives to tell a balanced story. Most case studies today are relentlessly positive. If an aspect of the story presents the solution in a remotely negative light, someone is sure to edit that out. However, a journalist writing a human interest story will report on the good and the bad. These stories talk about challenges that cropped up during the implementation and use of the solution and how the customer successfully resolved them. These less-than-positive facets make your story not only more credible but also a closer match for the “challenge” plot. The more challenges the protagonist faces, the more inspirational the story and the more likely it will drive action.

The trick, of course, is to select challenges that won’t make the vendor and its solution look bad—as if there’s a problem with the vendor’s solution. One idea would be to discuss a challenge that was slightly outside the standard scope of the vendor’s solution and how the vendor’s customer support saved the day by helping the customer perform some slight customizations.

Conclusion

Customer success stories are one of the most powerful weapons in your content arsenal. But like all content, this tactic is only as good as its execution. By keeping in mind proven customer-story plots, planning carefully for the interview with the customer, and following up on any details that are missing or don’t make sense, you can make sure that you create the compelling stories that grab customer attention and inspire them to take action.

About Goldberg Communications

Goldberg Communications is a strategic marketing communications company headquartered in North Carolina's Research Triangle. The company specializes in creating credible content that engages buyers and drives results for technology marketers. Founded in 1996 and originally located in California's Silicon Valley, the company has produced more than a thousand successful marketing pieces for clients ranging from start-ups to some of the biggest names in high tech.

About the Author

Cheryl J. Goldberg is principal of Goldberg Communications. Prior to starting the company, she worked as a senior copywriter for Sybase, Inc., and in senior editorial positions at leading technology publications including *PC Magazine* and *PC/Computing*. She has also written for publications including *Entrepreneur*, *InfoWorld*, *Oracle Magazine*, *Sybase Magazine*, and *Working Woman*.

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