



The Case Study Blueprint

How to capture, share, and cash in
on customer success stories

@JoelKlettke





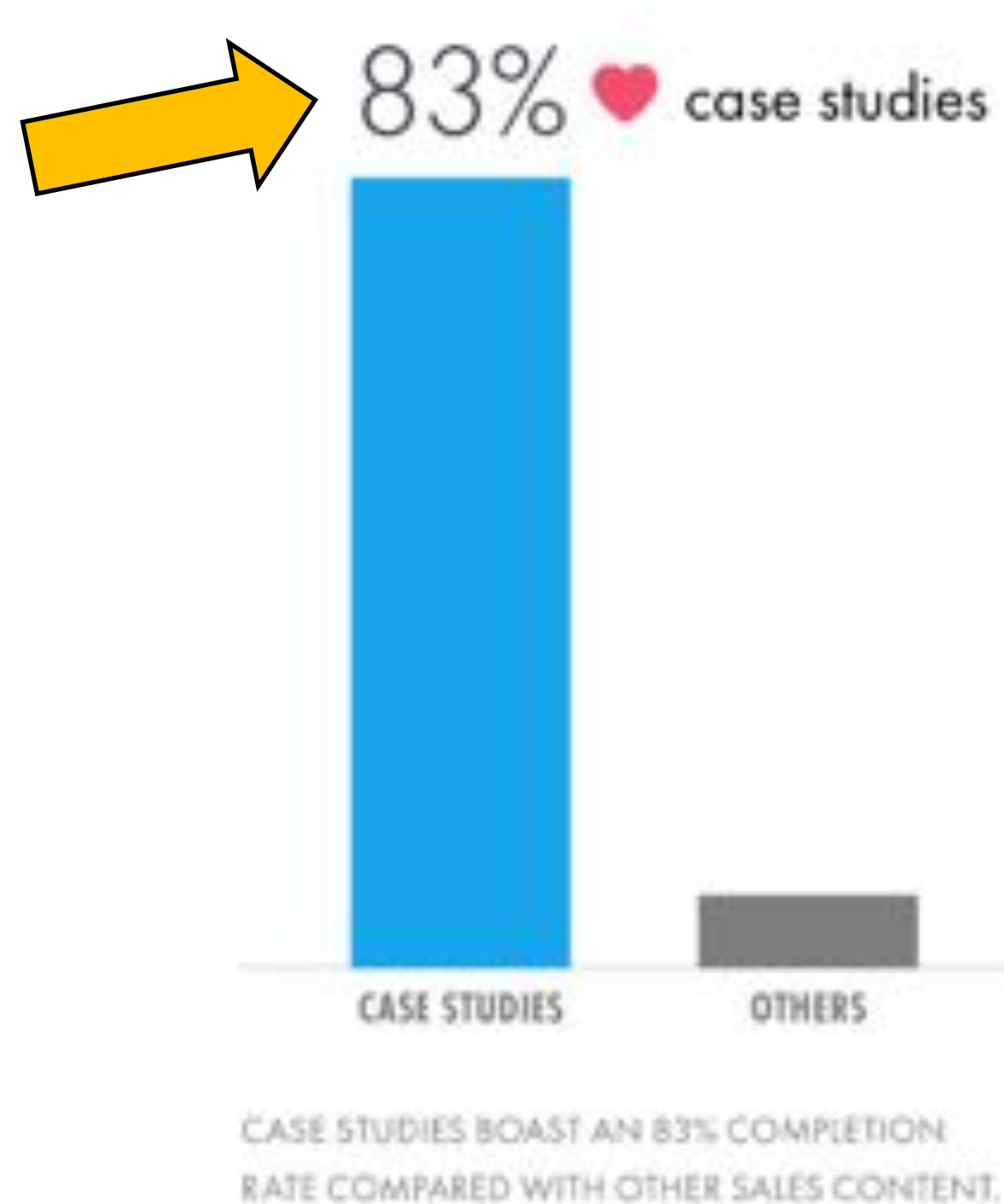
Customers love 'em...



Image source: <https://www.orbitmedia.com/blog/how-to-write-a-customer-success-story/>

Info source: <https://www.demandgenreport.com/resources/research/the-2017-content-preferences-survey-report>

Customers read 'em, too...



They influence decisions...



Of US Agency Execs

cited case studies as the most effective content for lead generation.



Of B2B Buyers

cited customer success stories as the most influential content they consumed.

Left to right:

1. RSW/US: <https://www.emarketer.com/Article/Agencies-Use-Content-Case-Studies-Generate-Leads/1010213>

2. Hawkeye: <http://www.hawkeyeww.com/view/2013/fall/3-keys-to-b2b-success.php>

No wonder, right?

Top 3 Most Effective Types of Content B2B Marketers Use for Content Marketing Purposes

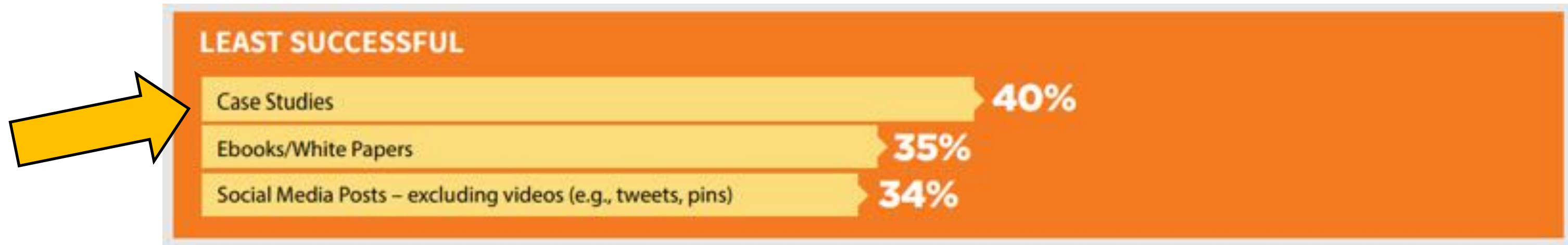
ALL RESPONDENTS



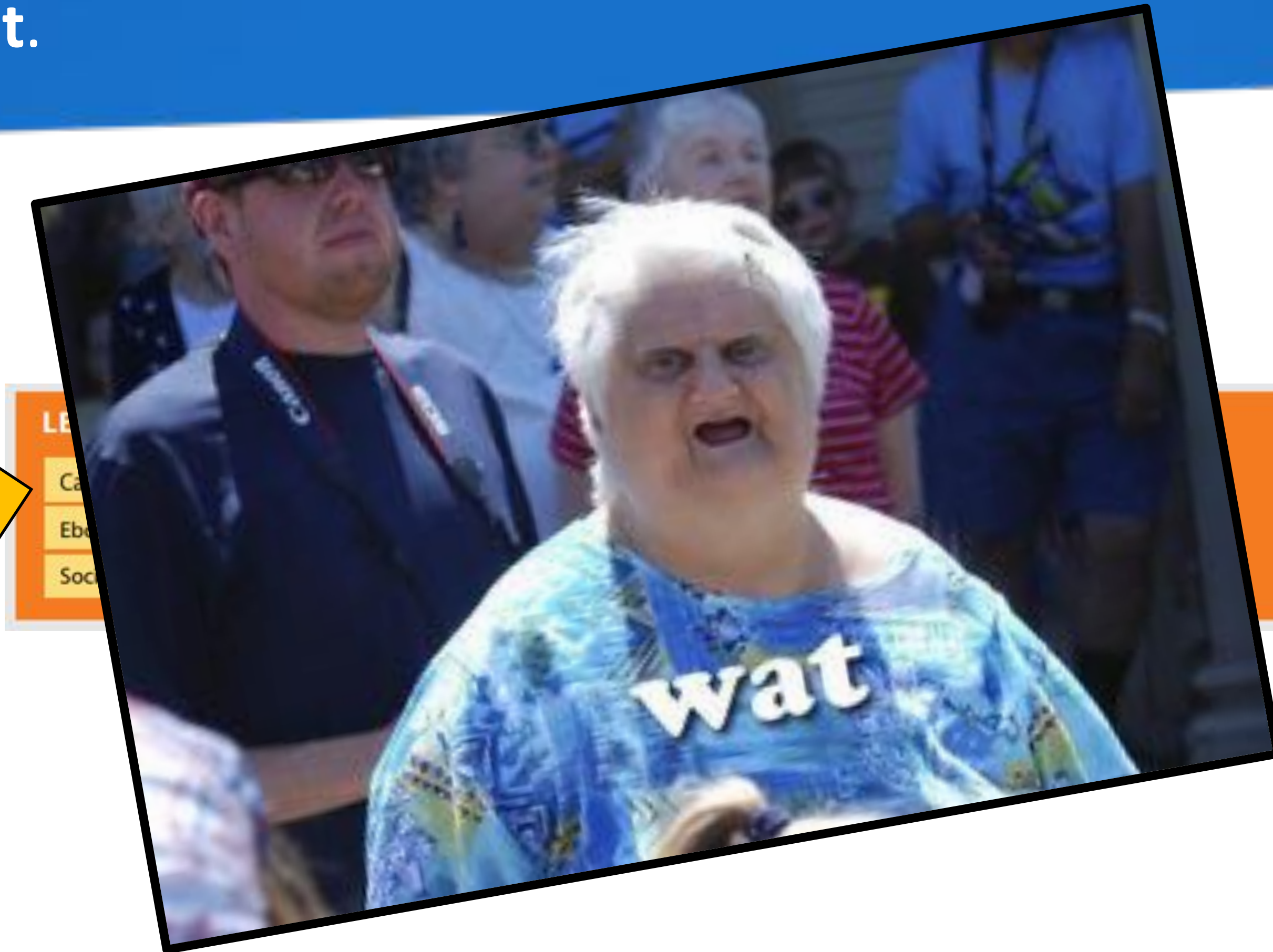
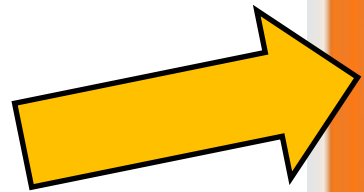
MOST SUCCESSFUL



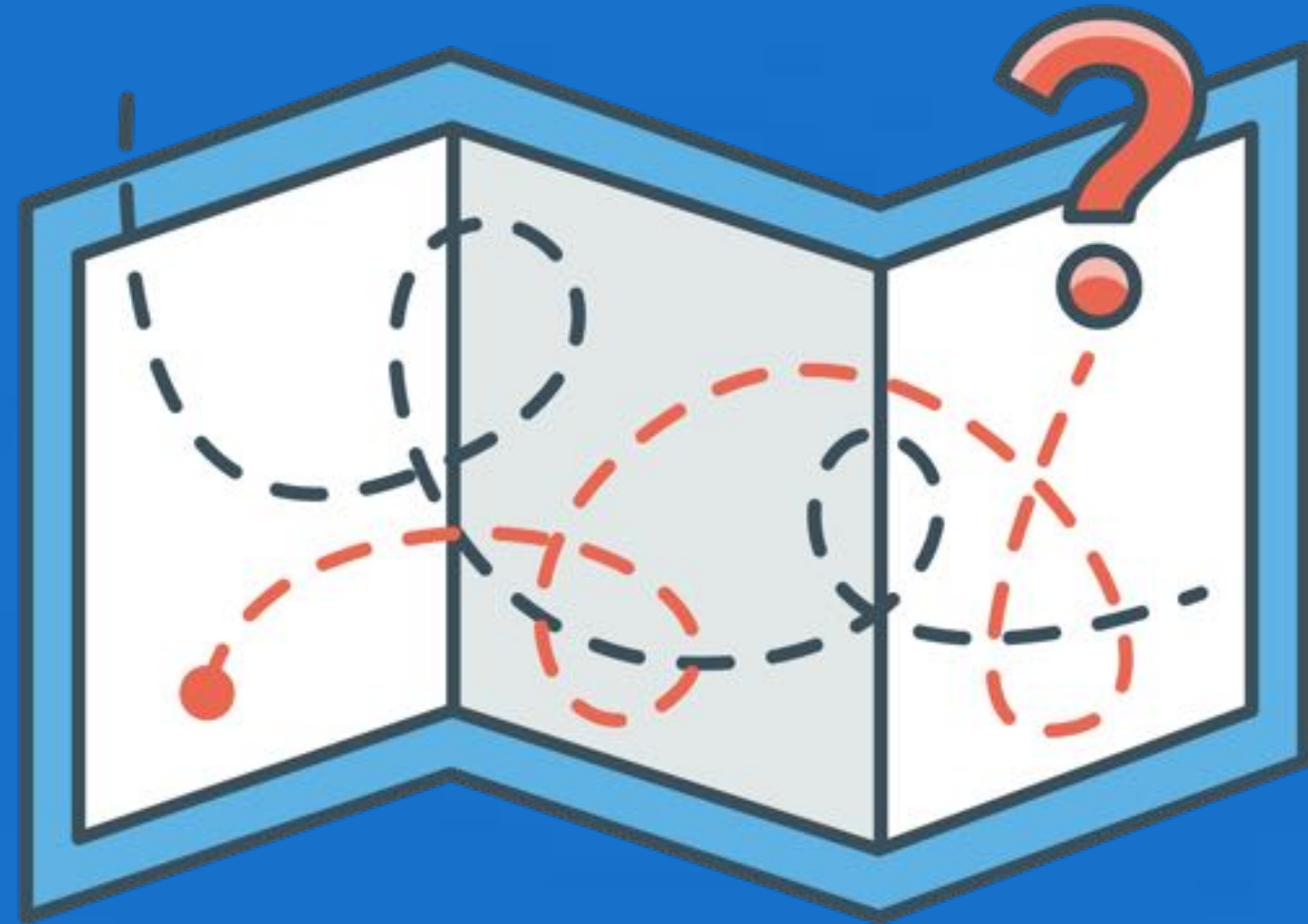
Um....



wat.







Step 1: Define Your Strategy

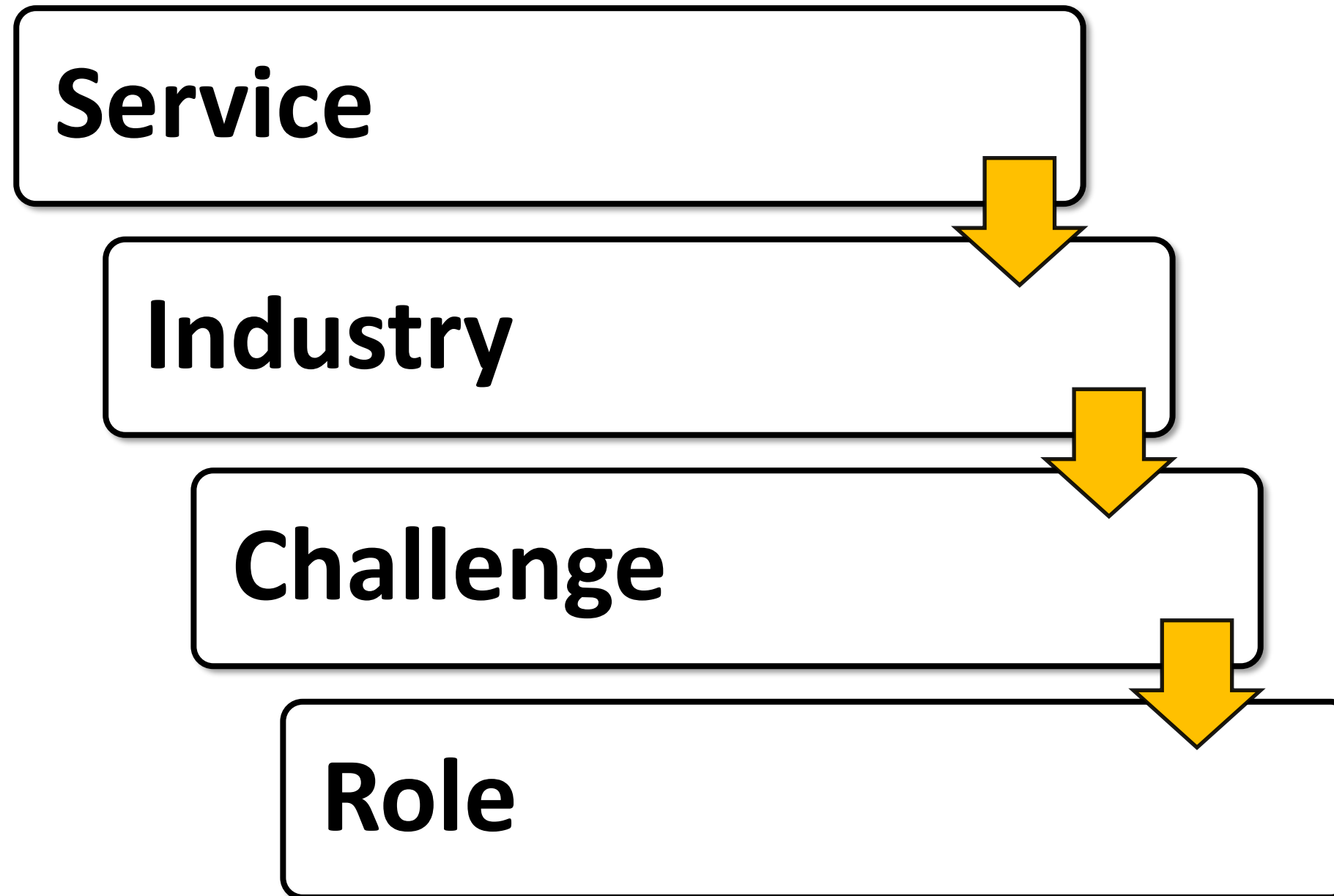
(And yes, you need one.)

Four questions to answer:

1. What is our **goal**?
2. Who are we **targeting**?
3. How will we **use** them?
4. Who owns the **relationship**?



Goal + Target = Story



Shortcut?



Use Case = Format

SHORT FORMAT

- Email outreach
- Social sharing
- Pitch meetings
- Send with RFPs

LONG FORMAT

- Lead magnet
- Blog content
- Staff training
- Newsletters

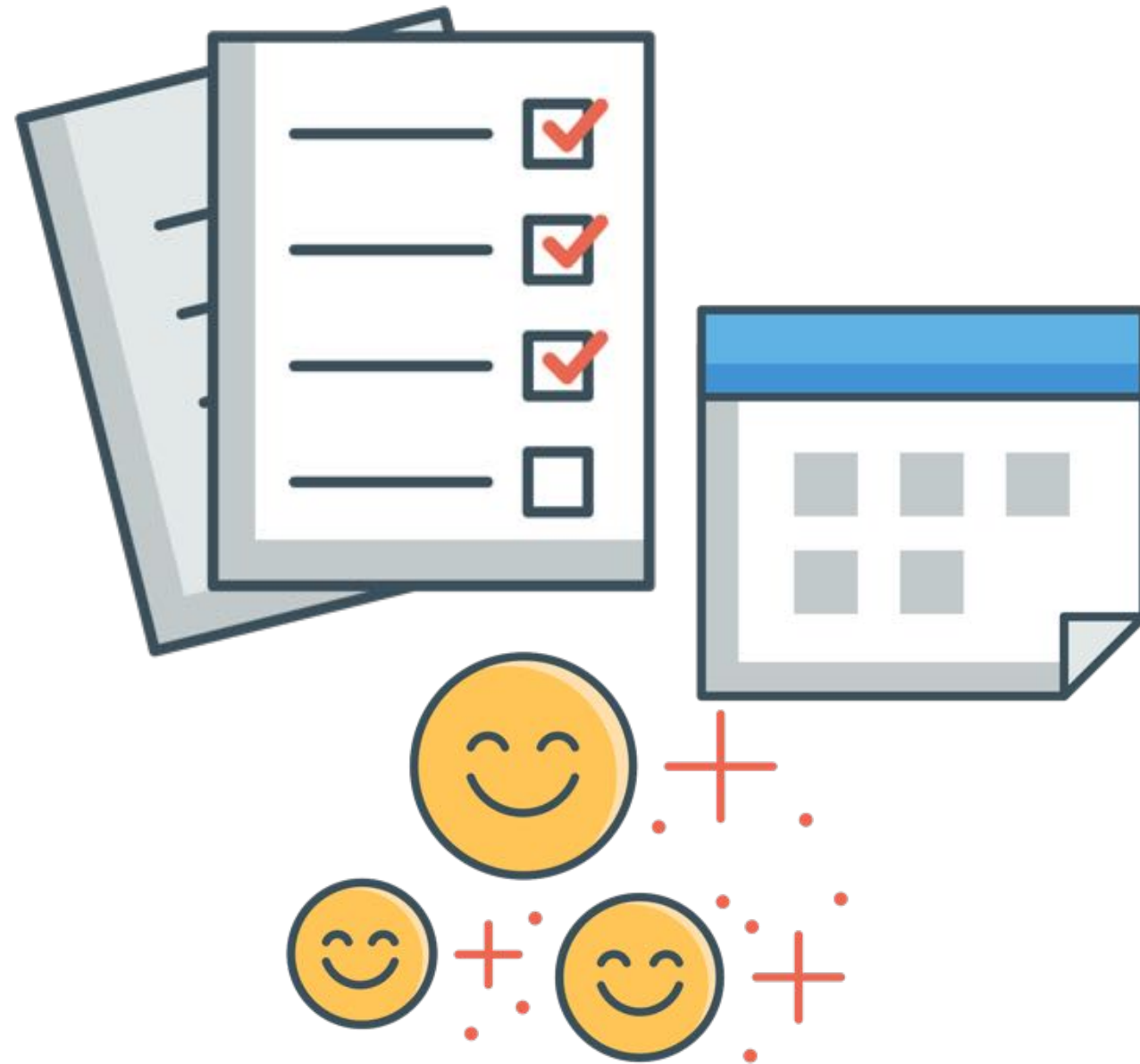


VIDEO

Do NOT do case studies
in a vacuum.



What makes a GOOD candidate?



1. Positive

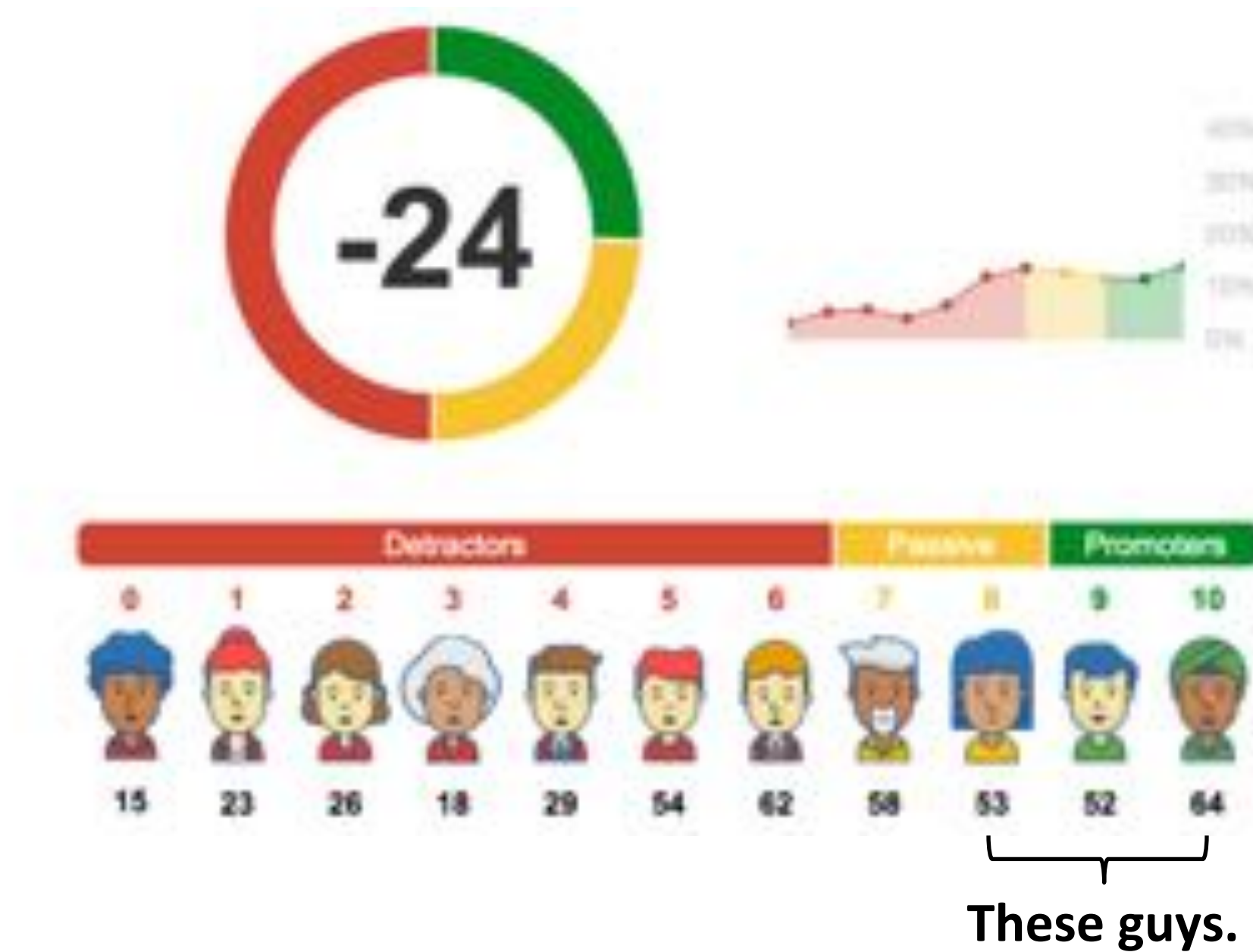
2. Recent

3. Relevant




**Sneaky tactic:
Escalating commitment!**

Candidates: NPS



Candidates: Reviews

Showing 179 FreshBooks reviews LinkedIn Connections



Johnathan L.

Review Source

Great for the Solo Entrepreneur Start-Ups

★★★★★

Updated On December 30, 2017

Validated Review
Verified Current User

What do you like best?

The price point is perfect, the ease of setting up an account. The ability to set up my services in the application, no software to install since it is cloud based, the mobile app, ability to set up the invoice and estimates template, connection to my business bank account, ability to track when an invoice has been opened.

What do you dislike?


It is a good simple account receivable system to use. I don't have many dislikes. Perhaps it would be nicer if they had more templates to choose from? Also, the manual entry for each service is annoying. Also, I would like to have an auto-incrementing invoice number system for each client. It wants to have the autoIncrementing across all clients and my system does not work that way. I have to remember each clients invoice number and increment it manually, again annoying.



Recommendations to others considering the product

Definitely, try the free trial. The trial gives you all of the features you would with the paid version. Also, I entered previous invoices so I can have a more fuller picture of how I have been doing for the year as a whole. I recommend you do the same. In doing so, you are also able to really test out the software to make sure it is a good fit for you.

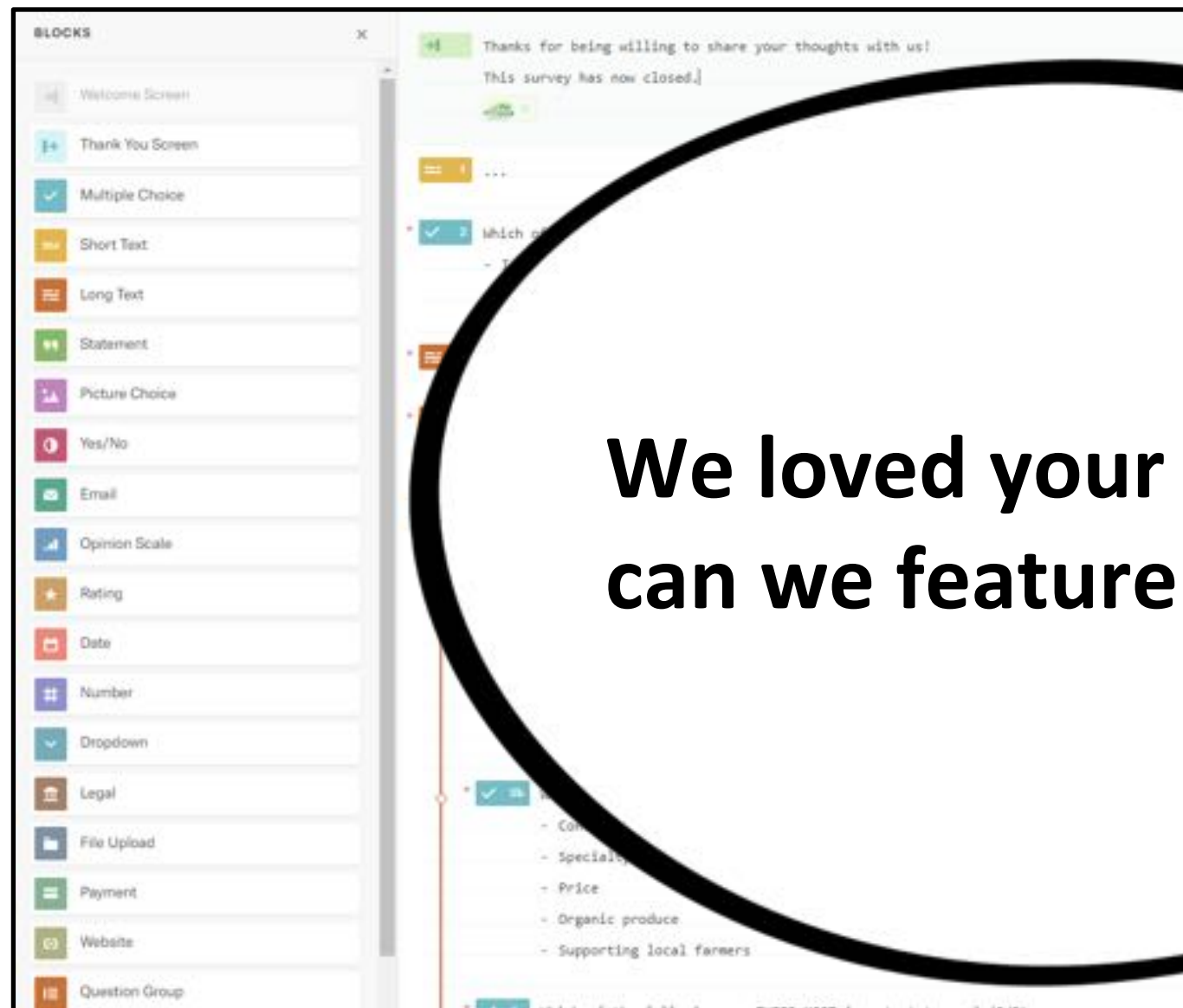
What business problems are you solving with the product? What benefits have you realized?

I used to invoice and provide invoices using Excel and Word. It took up time for me to do this. I ended up delaying a few times in getting invoices out. This is, in turn, caused me not to get paid faster. Using FreshBooks has eased this for me so I am able to create and send invoices much faster. Also, the invoices I send out now are very professional looking and having the ability to track my client's actions on the invoices saves me from having to do as much follow up with them to get paid.

SHARE ON  1

0 of 0 found this helpful.
Helpful?  Yes  No

Candidates: Surveys



**We loved your feedback;
can we feature you?**



**The stories you tell
will be the stories you attract.**



MINE!



Step 2: Get Buy-In

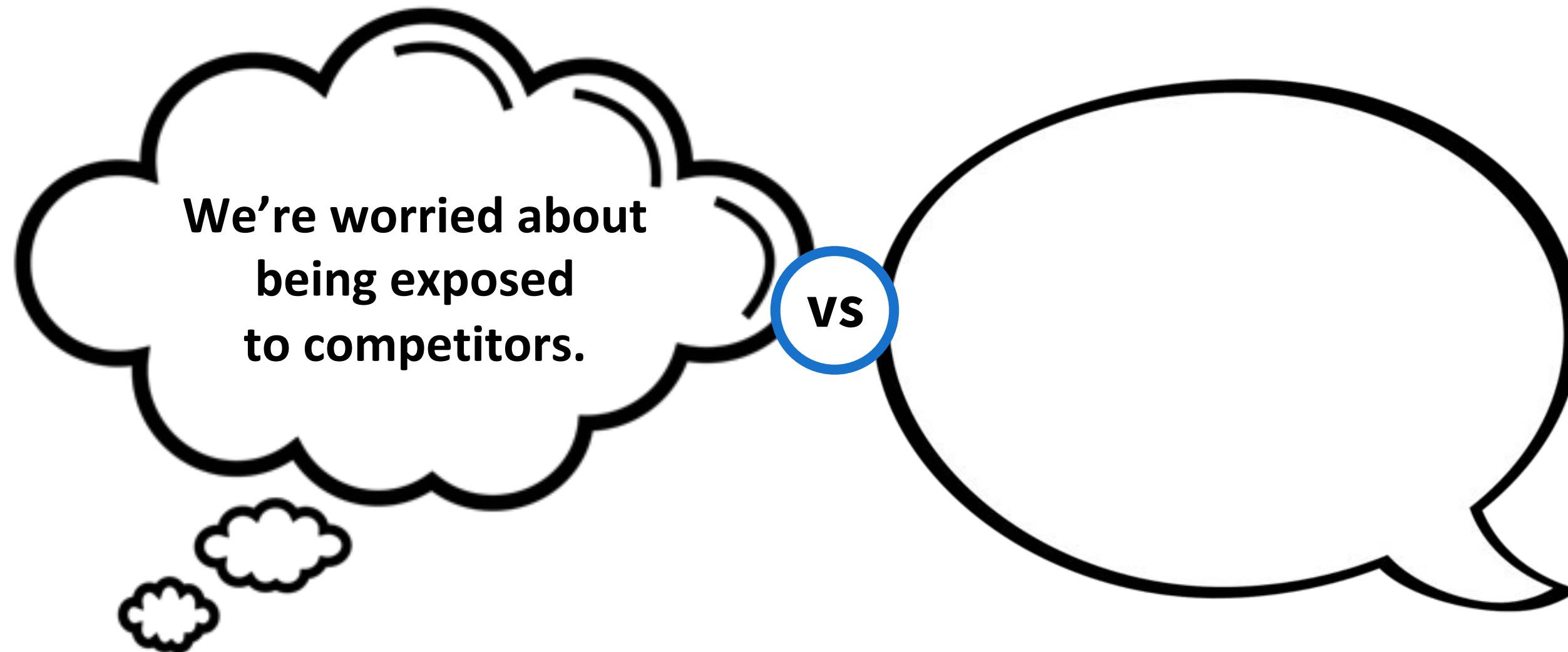
Three things to start doing now:



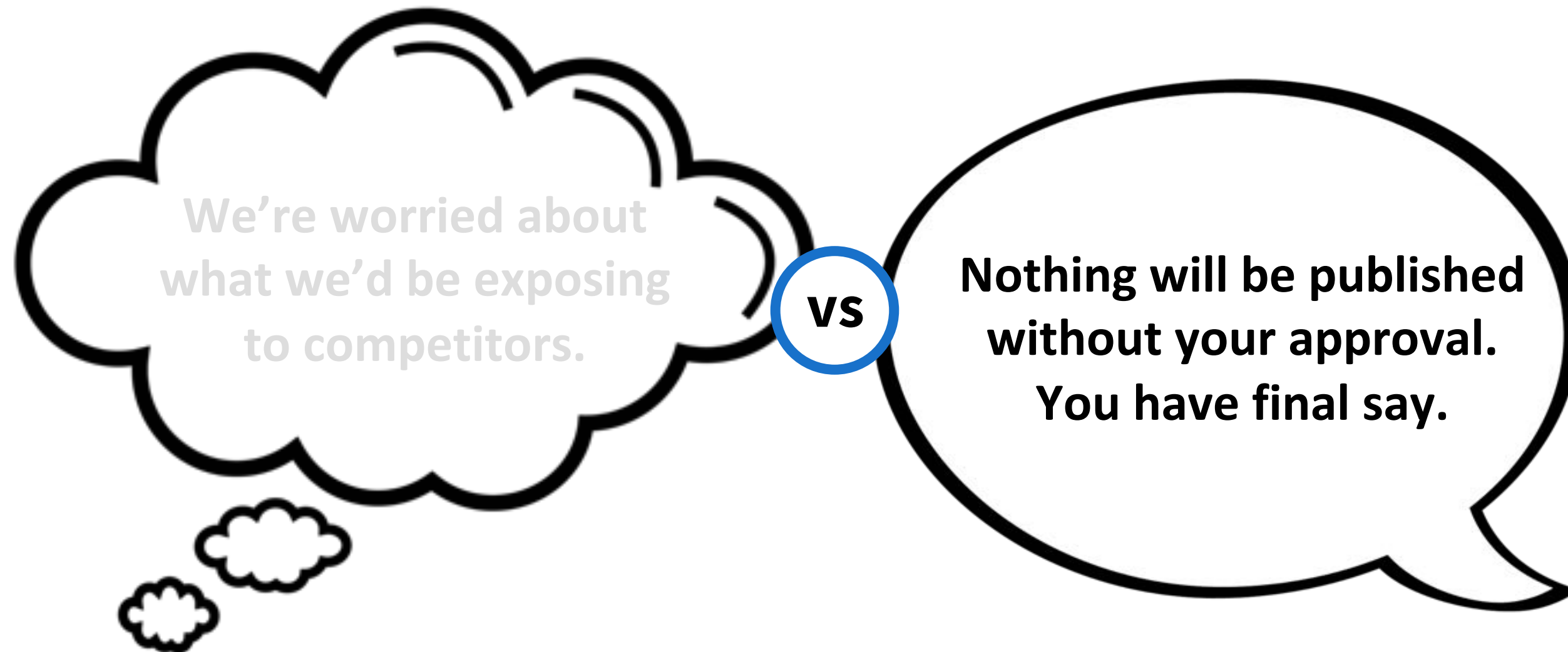
“No” is really...

- 1. Uncertainty**
- 2. Inconvenience**
- 3. Selfishness**

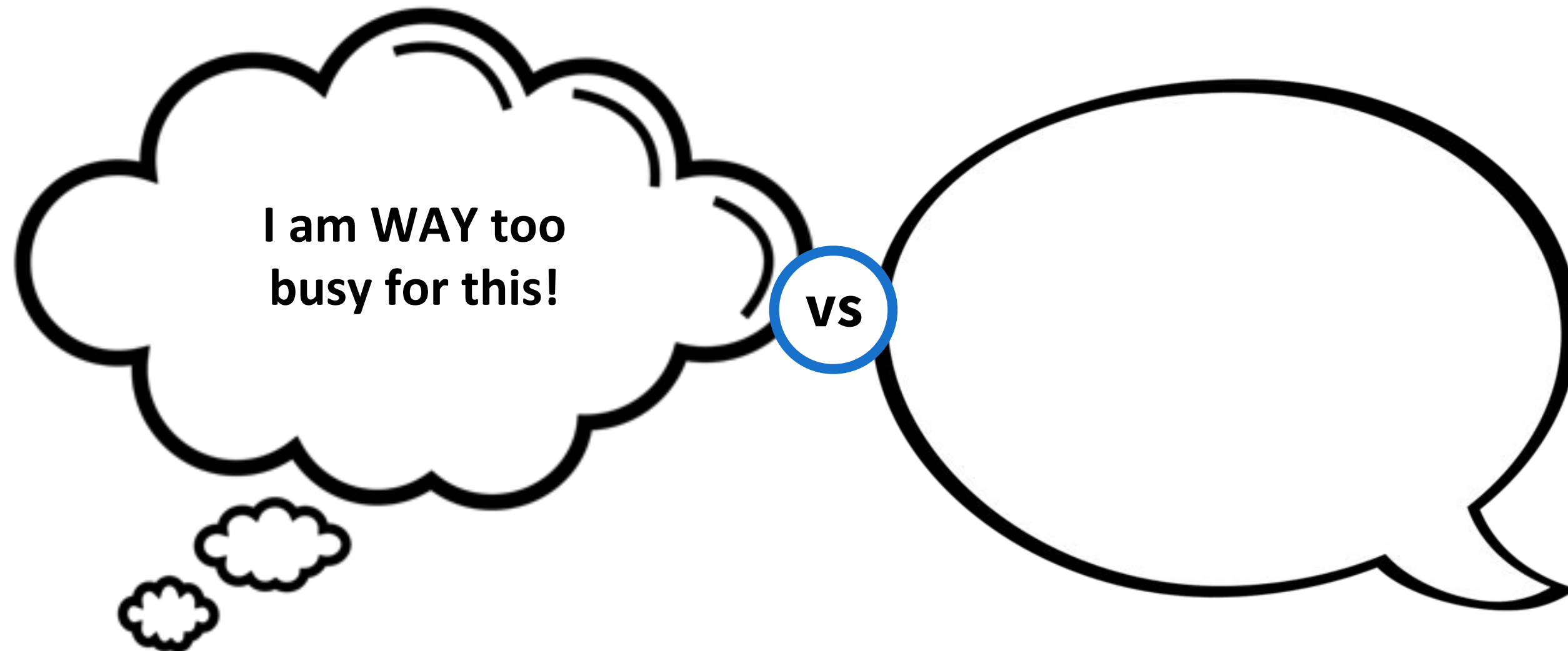
Uncertainty?



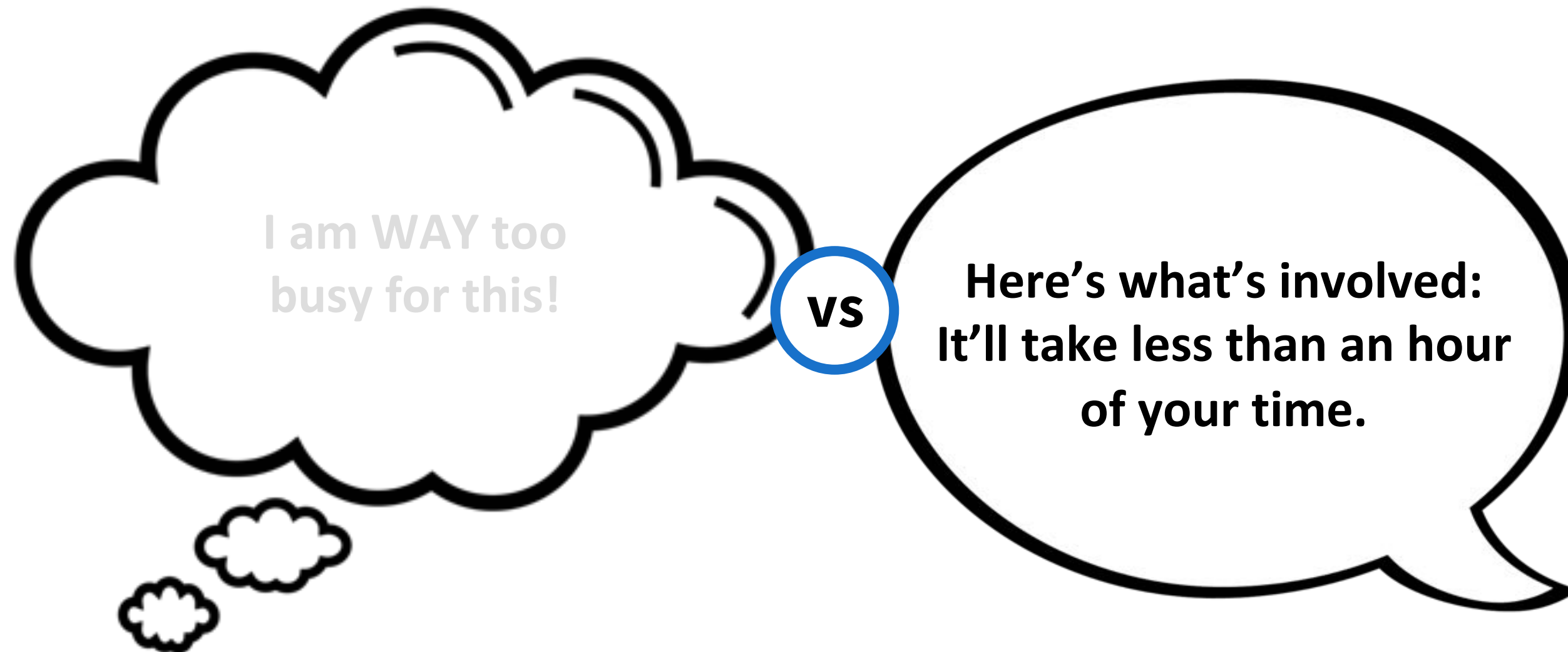
Uncertainty? Control.



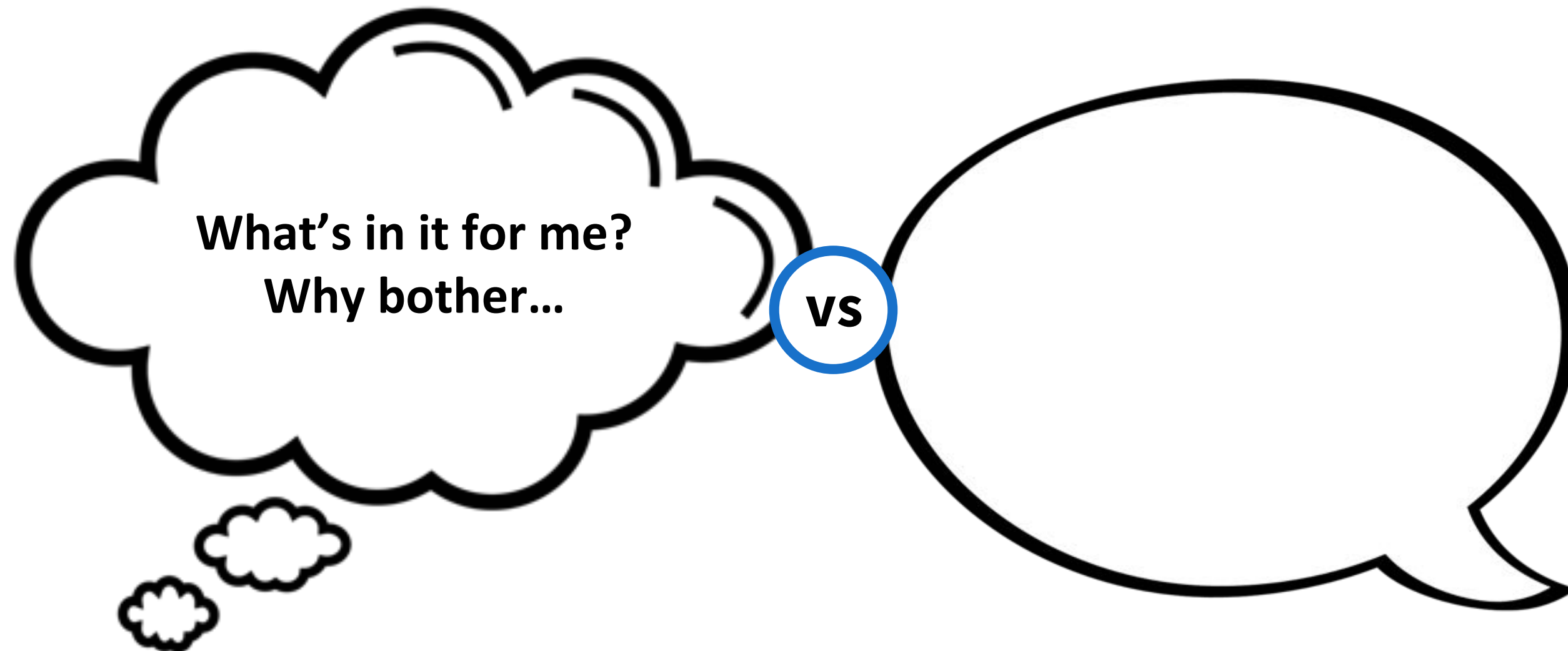
Inconvenience?



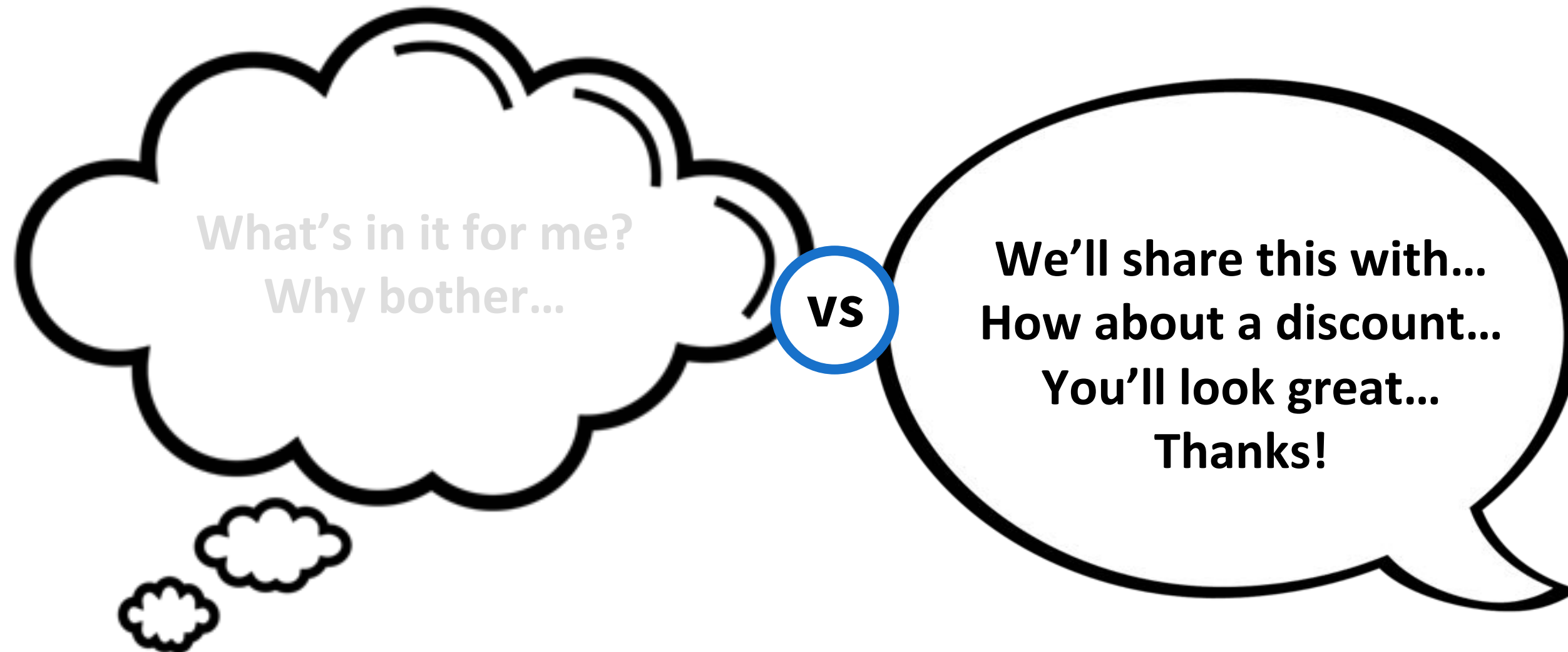
Inconvenience? Process.



Selfishness?

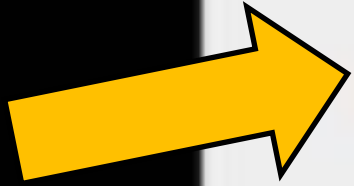


Selfishness? Benefit.



In your pitch...

- 1. Thank them in advance**
- 2. Keep it short**
- 3. Give a “because”**
- 4. Answer WIIFM?**
- 5. Give it a deadline**



Thank you for considering sharing your success story with us.

Our goal is to create some positive exposure for the great work your company is doing, share your successes and highlight the benefits you've seen from working with us.



01

We promise to keep it quick.

The entire process should take less
than an hour of your time.

02

You have the last word.

Nothing will ever be published
without your approval.

What's Involved?

We've partnered with Case Study Buddy, a case studies consultancy, to make this process as quick and convenient for you as possible.



01 SHORT INTERVIEW

A writer from Case Study Buddy will contact you to arrange a 20 - 30 minute interview at a time convenient for you.

You can see a list of the typical questions you'll be asked [here](#).

02 FIRST REVIEW

Within 1 - 2 weeks, you'll be sent a draft to review. You're welcome to make edits and request changes to make sure you're happy with how you and your company are presented.

We encourage you to share the draft with anyone who needs to approve it.

03 FINAL SIGN-OFF

After we incorporate your changes, you'll be sent a polished draft for final approval and asked to provide a headshot and logo for use in the story.

04 DELIVERY & USE

We'll send you a finished digital copy of your business story to use however you choose.

With your consent, your story may be shared on our website and social media channels in email campaigns and newsletters, at industry events and in other direct marketing efforts.

Whenever and wherever the story is shared, we will ensure the audience is your company's strengths, best practices and positive impact.

Let's get started!

To begin, reply to this email and confirm you're interested.
We'll have the team at Case Study Buddy follow up to schedule your
interview at a time convenient for you.

Or, click [this link](#) to schedule your interview directly.

Thank you for your time.

If you have any questions about anything we've
outlined here, please don't hesitate to ask.



Secret weapon: samples



Don't give up...



INDUSTRY

Financial Services

LOCATION

Global

3+

Years of Partnership

50+

Successful Content
Projects

The Company

The client is a global financial services company with a diverse line of products that help their customers live their best lives.

They've allowed us to share their story on the condition of anonymity. Client names have been changed.



"Kristina and her team have a great framework to start from and experience you can't find anywhere else."

In partnership with them, we've ensured we're not just technology-driven, but stay user-centered."

Riley, Assistant Director of Digital Strategy

The Challenge

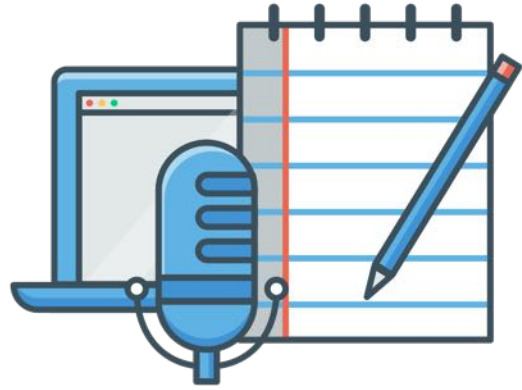
The client initially engaged Brain Traffic for a one-day working session with their retirement services group to create a roadmap that would help them create, plan, deliver, maintain, and govern their online content.

Alternatives...

- 1. Agree to gate**
- 2. Internal use only (fireside)**
- 3. Exclusivity agreement**
- 4. Testimonial only**



Step 3: Capture the Story



Your one job:

Maximum info, **minimum** time.



Planning the interview

- 1. Keep it to two**
- 2. Test your tech**
- 3. Give lead time**

Structuring the Interview



B

Before



D

During



A

After

Running the Interview

“What does success look like for you?”

Running the Interview

“What does success look like for you?”

“What was going on in your business when...”

Running the Interview

“What does success look like for you?”

“What was going on in your business when...”

“Most valuable thing _____ brings to the table, and why?”

Running the Interview

“What does success look like for you?”

“What was going on in your business when...”

“Most valuable thing _____ brings to the table, and why?”

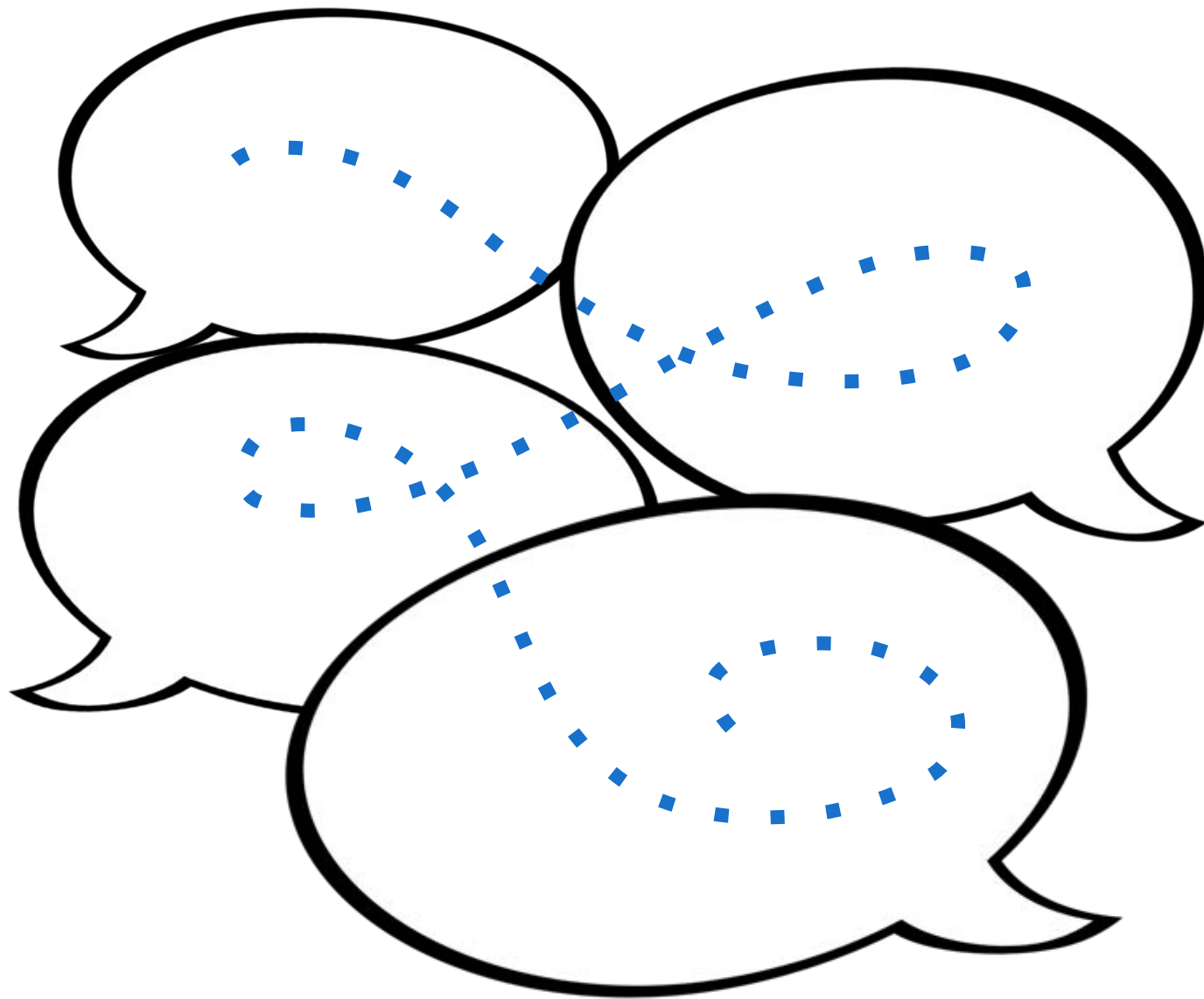
“What results have you seen because of...”



Lindsay's List

[**https://www.casestudybuddy.com/contentjam**](https://www.casestudybuddy.com/contentjam)

Interview Flow



1. **“Why?”**
2. **Repetition**
3. **Silence**

The golden rules

1. **Experience**, not opinion
2. **Process** > perfection
3. **Impact** over platitudes
4. **Context** is critical



**Secure a way to
follow up.**



Step 4: Create the Study

Headline: Hook

- **How** (service/company) helped (client) (result)
- (Result) **for** (client)
- (Client) **gets** (result) **with** (service)
- **How** (client) (eliminated pain) **with** (service)

Cover Page: Bait



- **No “grand reveal”**
- **Headshot where possible**
- **Good enough to stand alone**

Intro: Set the scene

CHALLENGES

Paper-based quality management system not keeping pace with company growth

For businesses in the pharmaceutical, biotech, and medtech industries, meeting strict regulatory and compliance requirements is non-negotiable. Failing to meet compliance standards might mean lost business or even a complete shutdown of operations.

These were risks that Jasmine Beukema, VP Quality at SOPHIA GENETICS, knew all too well.

“As a biotechnology company in the health industry, we need to prove that we’re handling data in the most secure way possible—which means passing our ISO 27001 certification audits,” Jasmine says.

“We’re constantly working to improve the quality of our products, processes, and the way we work together as a company, and it’s essential that we remain compliant with everything we need to be compliant to.”

- Ditch the “Company” line
- Show the consequences
- Make it personal
- Let your client tell the story

Solution: The How & Why

The Solution
PREDICTIVE ANALYTICS

To identify key areas of improvement, the River Cats sent SeyVu anonymous survey data. SeyVu used this data to perform cluster/sentiment analysis on fan comments that would identify actionable insights Jeff could use to enhance the fan experience.

SeyVu arrived at these insights using their Six-Step Process:

- 1 Define the problem
- 2 Analyze existing customer data
- 3 Transform data into easy to understand formats
- 4 Make predictions and test outcomes
- 5 Deploy in production
- 6 Discover other potential opportunities

- **“Just enough” detail**
- **Sequential process**
- **Don’t leave out the why**
- **Focus on experience**

Results: More than Metrics

Results

4,500+ NEW LEADS & DOUBLE THE TRAFFIC

In the first six months of 2017, Konstruct Interactive has helped Bucars generate more than 4,500 leads from their website. They've also increased traffic by 173%, along with a 74% increase in organic search traffic and a 45% decrease in cost per click for AdWords—results that have surprised even Jeff.

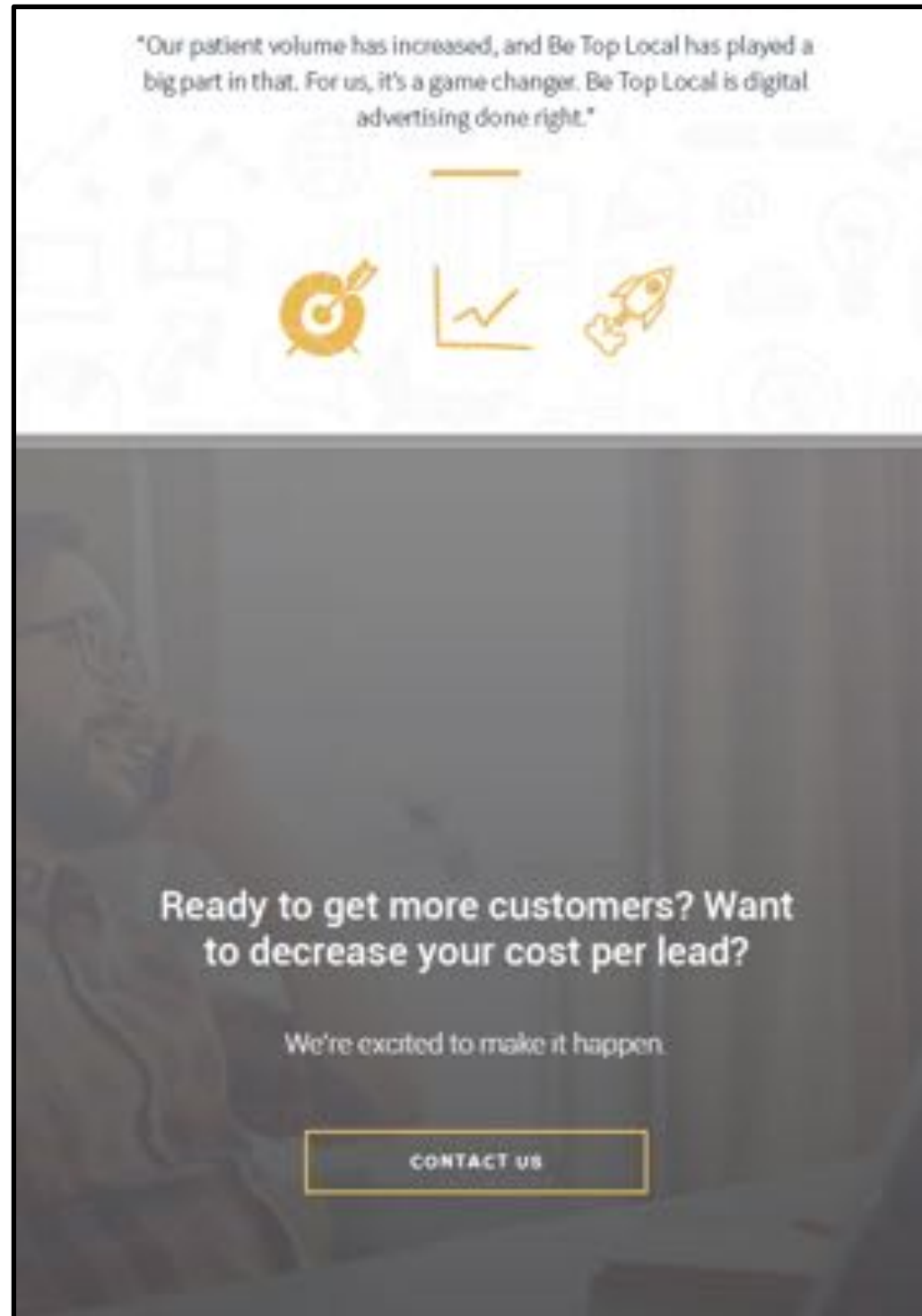
"They've been so great at everything. Looking at the results for organic and paid traffic, they're doing so well. They're killing it," laughs Jeff.

Since implementing their initiative to garner more Facebook and Google reviews, Konstruct has helped Bucars obtain 67 new five-star reviews in a six-month period—a massive increase from the five reviews that Bucars had prior to beginning the campaign.

It's not just about numbers.

It's about what they mean for the business, its people, and its future.

Context-Rich CTA



- **Specific pain**
- **Specific outcome**
- **Specific action**
- **Tied back to the story**

Trusted Formats



- **Challenge/Solution/Results**
- **Interesting sub-heads**
- **Call out quotes visually**
- **Short sentences and frequent breaks**

Appealing to Scanners

**(BUSINESS
BY DESIGN)**

James Wedmore has been teaching businesses how to market themselves on YouTube for over nine years.

His course, Business By Design, teaches influencers how to package and sell their knowledge.

Highlights

Challenges

- Brand new launch underperformed targets
- Need to embrace a new audience in a highly competitive market
- Unfocused, ineffective messaging

Solution

- Extremely detailed research process
- Brand new sales page
- Supporting copy for affiliate promotion

Results

- \$490,183 in launch sales
- Nearly 2x improvement in earnings per lead (\$67)
- "Carl Open" Day: 67 units/\$146,786 (30.02% of total sales)

Challenges

Breaking into a new market

After more than nine years of teaching businesses how to master video marketing, James Wedmore had become a respected authority in the field. He knew his audience, his messaging, and his offer inside and out.

But as time went on, James realized that clients had another need: they didn't just want to learn how to be successful on YouTube, they wanted to know how to rebrand themselves as industry leaders.

"

After every course, I had people come up and ask, "How did you build a brand around being the video guy? How did you build a business around it? I want to do that." James smiles.

"

"So in 2016, my team and I shifted our focus to teaching others how to do what we did," James explains. "We came up with Business By Design, which helps course creation and online influencers package and sell their expertise in the form of online courses, group coaching, or membership sites."

For James and his team, shifting focus meant charting new territory.

"

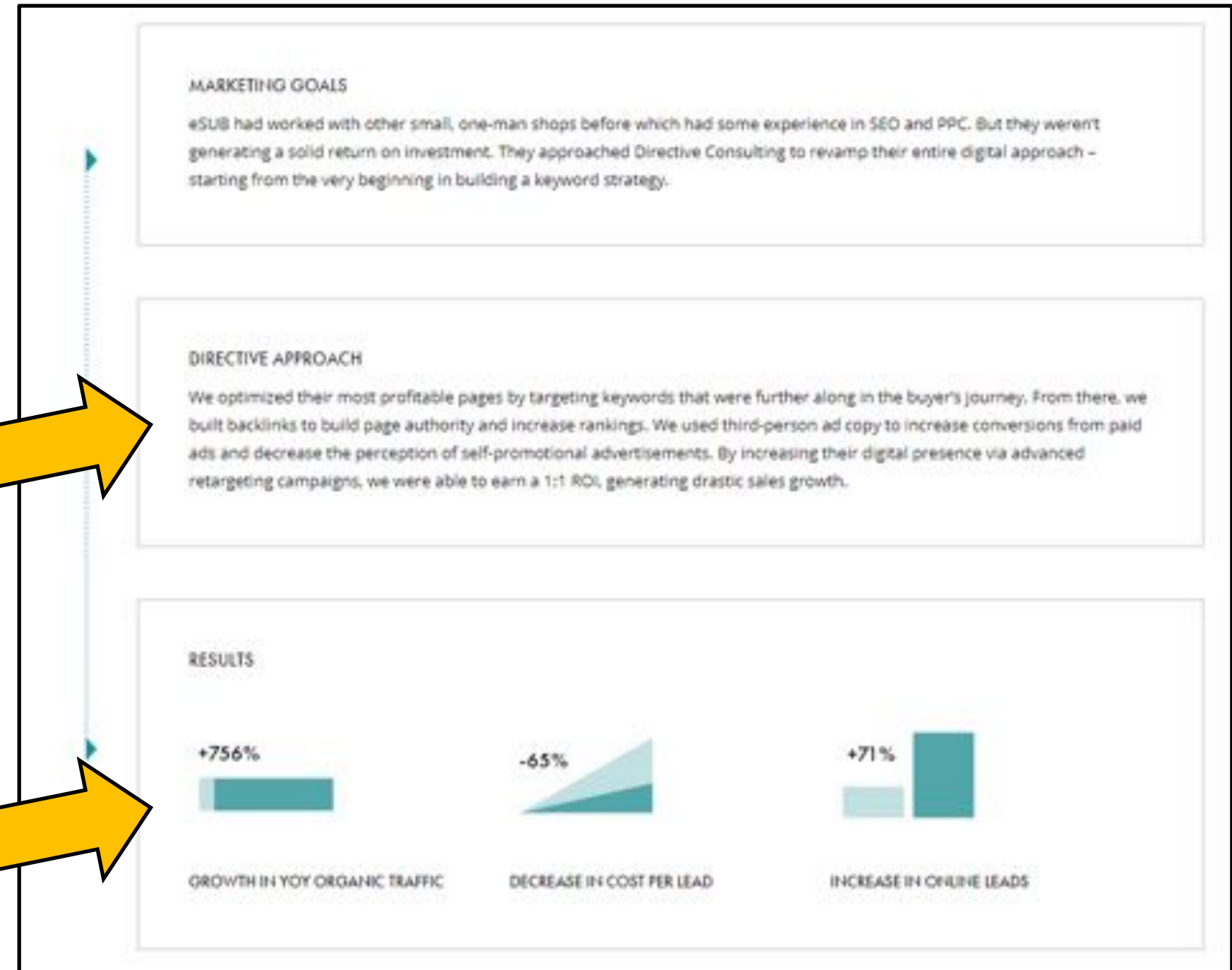
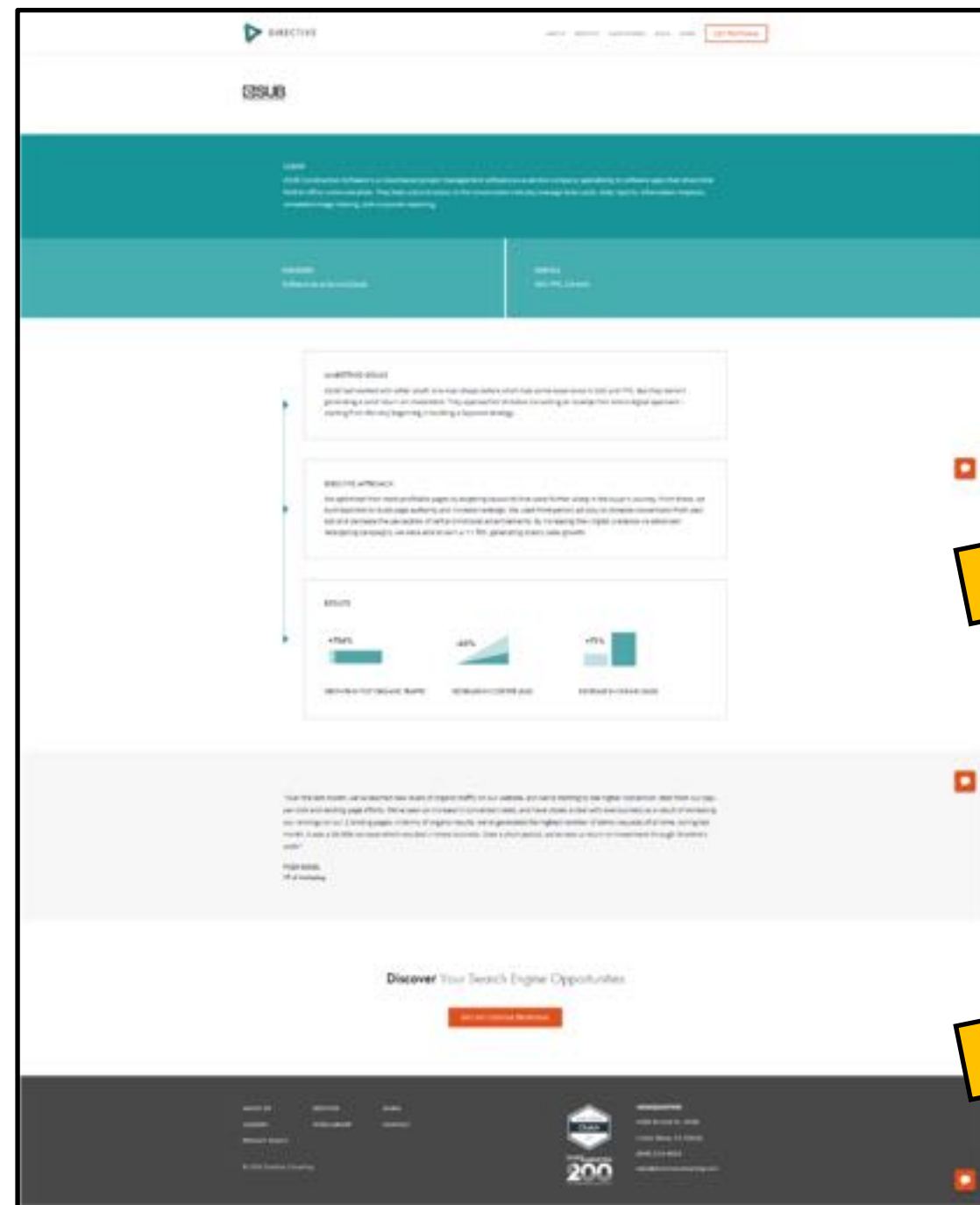
"Stepping into a new market was like starting over," James recalls. "We were back at square one, learning new market research and creating a new avatar—and we found ourselves in a more competitive market. That's when our need for a copywriter became apparent, very quickly."

"

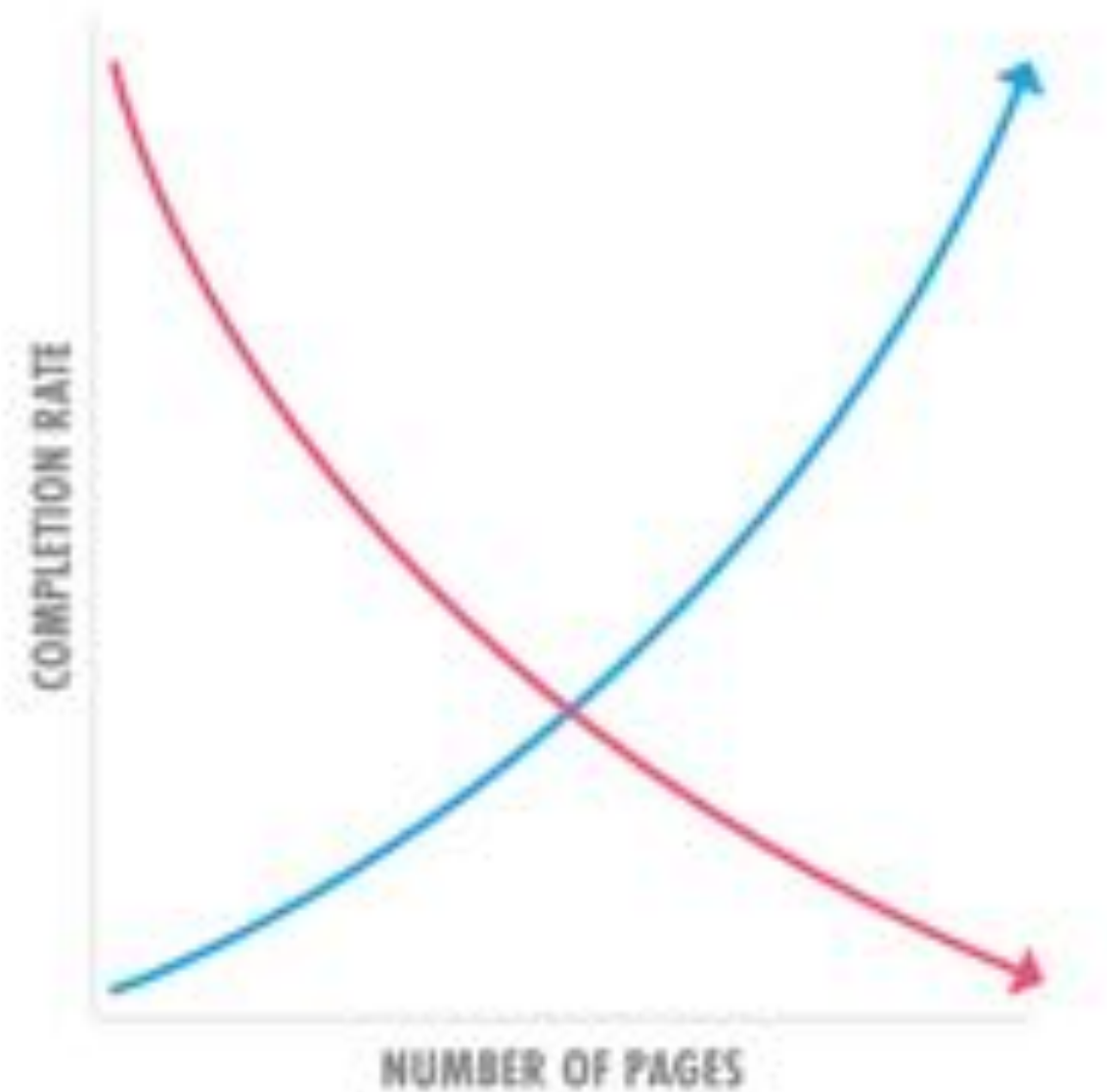


Case
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Buddy

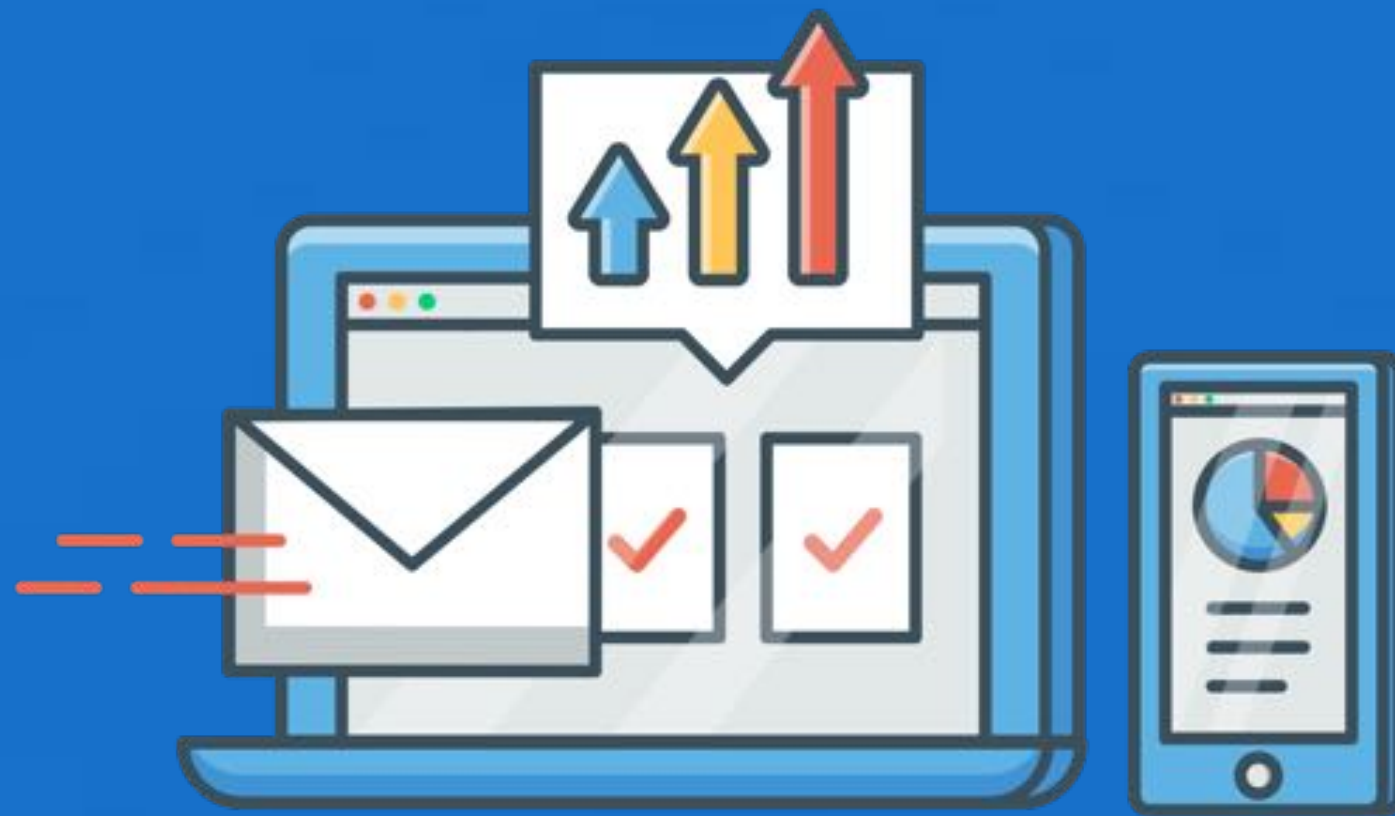
Reducing Cognitive Load



Is there a “magic” length?



COMPLETION RATE WAS HIGHER WHEN
CONTENT WAS NO MORE THAN 2-5 PAGES IN
LENGTH.



Step 5: Put it to Use!

Repurpose

Bite

1. How Case Study Buddy helped Loop close 30% more sales with customer success stories
2. The Company
3. The Challenge
4. Building credibility in a crowded niche

Snack

The Company

Loop

When employees need answers, they don't read through a manual or click through a course. They search the web—or ask around.

Loop is a learning platform that harnesses those habits and makes it easy to give employees on-demand access to info they can actually use.

“Case studies are invaluable to us. With Case Study Buddy, we’ve saved so much time and money—and what they produced was far beyond what we could do in-house.”

Ben Murray
Co-Founder, Loop

loop

Industry
SaaS

Learning and Development

Location
U.K. (Global)

Services/Products

- Onboarding
- Client onboarding
- Onboarding
- UX Design

The Challenge

Building credibility in a crowded niche

With over 1000 competitors in the banking and development industry, Ben Murray, Co-Founder of Loop, knew that the best way to drive potential clients their value and maintain their innovative approach was with customer success stories.

But as a start-up, Loop already had a million things to do and not enough time in the day to get them done.

They wanted stories that helped them stand out, but lacked the experience and resources to do them right.

Ben needed a partner who could get to know his business' unique

Meal

The Company

Loop

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Ben Murray
Co-Founder, Loop

loop

Industry
SaaS

Challenges

- Needed access to what demonstrated what made Loop stand out from the crowd
- High-profile clients with limited time, needed to get the process right
- Producing case studies in-house was too time-consuming for a lean start-up

Solution

- Case Study Buddy took the time to learn what made Loop special and how to best bring that to the surface
- White-glove approach to interviewing clients kept things on schedule and professional
- Efficient process consistently churned out the kinds of stories that Loop needed to stand out

Results

- Loop finally had the customer success stories that proved why they were worth investing in
- As a result, they earned 30% more leads into sales, and incoming leads are more qualified than ever before
- The critical feedback Case Study Buddy gathered helped Loop better serve their clients and make their sales even more effective

Challenges

Building credibility in a crowded niche

In an ocean of "new" learning software, Loop has built something truly unique: a platform that harnesses the way modern employees actually learn to deliver useful information on demand.

But with over 1000 competing platforms to contend with, Loop needed a way to stand out and help leads clearly understand what made them better than the other guys.

Ben Murray, Loop's co-founder, knew customer success stories were the fastest way to make that happen, but collecting in-house time and resources just wasn't feasible.

“We had to move other important things to the side-to-day, we just couldn't prioritize them,” Ben explains. “We can't just put things on pause to write case studies, no matter how much we need them.”

TOFU

- ✓ **Use as lead magnets**
- ✓ **Post to social feeds**
- ✓ **“How-to” + “Interview” blog posts**
- ✓ **Print for tradeshow**
- ✓ **Pull testimonials into landing pages**

TOFU: Facebook Ads

 AgoraPulse shared a link.
Posted by Jenny Brennan (7) · December 13 · 

Facebook is becoming an increasingly effective marketing tool for local businesses.

Check out our most recent case study, where we look at how a salon grew their email list by over 2000 subscribers on a tight budget!



How to build your email list on Facebook on a tight budget
www.agorapulse.com

Facebook is becoming an increasingly effective marketing tool for local businesses. According to a recent online statement Facebook is working on

Organic	Paid
860	1,702

2,562 people reached

[See Results](#)

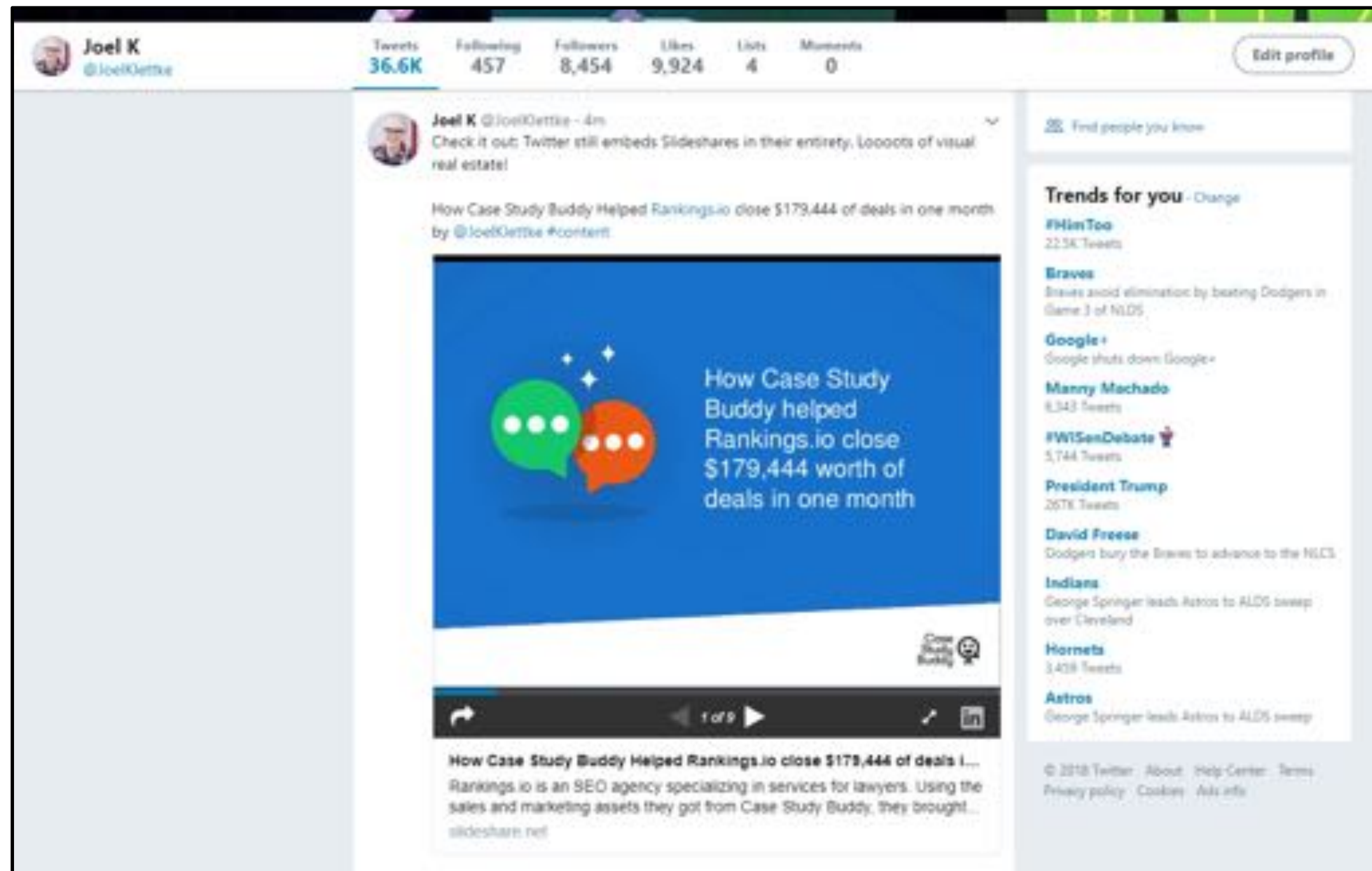
Like · Comment · Share

2 Shares

 2 Shares

 Nicolas Lix, Claire Lesage, Karim Fekal and 13 others like this.

TOFU: Slideshare + Twitter



Outreach Angles

Service

“How (service) drove (result)”

Industry

“Here’s how we did X for Y.”

Challenge

“If you want to X, we’ve done it.”

Role

“Why do X like you trust us to Y?”

Where to try?

- 1. Metrics or quotes in subject lines**
- 2. Quotes as support in body copy**
- 3. Short downloadable with CTA**
- 4. Video? EVERYWHERE.**

Subject Line Ideas

- “I wish I’d known about them earlier...”
- ____% higher (metric) in (time). Interested?
- What could you do with ____% more (metric)?
- How to get ____% traffic for your ____
- [CASE STUDY] How (known brand) got (result)

Body Copy Ideas

“Here’s what happened when we did **(thing)** for **(client)**: **(result)**.”

“One of our clients, **(client)**, was able to **(result)** because of **(service/offer)**.”

“Here’s what **(client)** had to say about **(service)**:”



“Prominently mentioning a famous customer in the email tripled the number of people who replied to the email and said “yes, I’m interested in this.”

- HipLead

Source: <https://www.hiplead.com/blogs/social-proof-works-for-b2b>


- ✓ **Send with RFPs**
- ✓ **Share in pitch meetings**
- ✓ **Add to newsletters**
- ✓ **Drip in email series**
- ✓ **Equip first contact**

MOFU: Retargeting

 Sync2CRM
Sponsored · 

Like Page

Thanks Charlotte! We are so glad you like Sync2CRM. Happy syncing!



★★★★★

"Sync2CRM is so easy to use and works like a charm."

Charlotte Parrish,
Brand Manager, SCA

★★★★★ "Makes My Life So Easy!"

Charlotte: "It's a game changer for our business as it allows us to do something we've ALWAYS wanted to do but never could before."

sync2crm.com

Sign Up

Like

Comment

Share

Buffer

- ✓ **Add near points of friction**
- ✓ **Justify an upsell**

TOFU/MOFU/BOFU: signature

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Joel Klettke

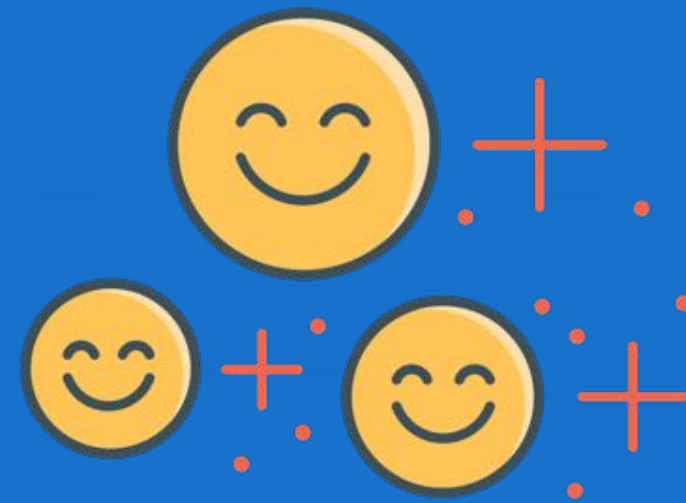
403-804-0493

>> CASE STUDY: [See how I helped HubSpot double their conversions](#) <<

BUSINESS
Casual

<copywriting>

Thank you!



@JoelKlettke

CaseStudyBuddy.com/ContentJam