The Case Study Blueprint
How to capture, share, and cash in on customer success stories
Customers love ‘em...

Image source: https://www.orbitmedia.com/blog/how-to-write-a-customer-success-story/
Customers read ‘em, too…

CASE STUDIES BOAST AN 83% COMPLETION RATE COMPARED WITH OTHER SALES CONTENT.

Image and info source: https://lp.docsend.com/sales-benchmarks-report
They influence decisions...

62.6% of US Agency Execs cited case studies as the most effective content for lead generation.

77% of B2B Buyers cited customer success stories as the most influential content they consumed.

Left to right:
Top 3 Most Effective Types of Content B2B Marketers Use for Content Marketing Purposes

**ALL RESPONDENTS**
- Ebooks/White Papers: 50%
- Case Studies: 47%
- Social Media Posts – excluding videos (e.g., tweets, pins): 41%

**MOST SUCCESSFUL**
- Ebooks/White Papers: 62%
- Case Studies: 47%
- Social Media Posts – excluding videos (e.g., tweets, pins): 43%

No wonder, right?
LEAST SUCCESSFUL

- Case Studies: 40%
- Ebooks/White Papers: 35%
- Social Media Posts – excluding videos (e.g., tweets, pins): 34%
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?
THAT'S NICE HONEY
Goal + Target = Story

Service
Industry
Challenge
Role
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

These guys.
Great for the Solo Entrepreneur Start-Ups

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 estimate 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 client’s 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 part, 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.

0 of 0 found this helpful
Helpful? Yes No
We loved your feedback; can we feature you?
The stories you tell will be the stories you attract.
Money fixes politics.
Step 2: Get Buy-In
Three things to start doing now:

We often feature clients in success stories...
“No” is really...

1. Uncertainty
2. Inconvenience
3. Selfishness
Uncertainty?

We’re worried about being exposed to competitors.
Uncertainty? Control.

We’re worried about what we’d be exposing to competitors.

VS

Nothing will be published without your approval. You have final say.
Inconvenience?

I am WAY too busy for this!

I am WAY too busy for this!

VS

Here’s what’s involved: It’ll take less than an hour of your time.
Selfishness?

What’s in it for me? Why bother...
Selfishness? Benefit.

What's in it for me? Why bother...

VS

We’ll share this with... How about a discount... You’ll look great... Thanks!
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.

- We promise to keep it quick. The entire process should take less than an hour of your time.
- 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’ll be 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 success 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, all industry events and in other direct marketing efforts.

Whenever and wherever the story is shared, we will expose the audience to your company’s strengths, best practices and positive impacts.
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 content 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
“What does success look like for you?”
“What does success look like for you?”

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

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

https://casestudybuddy.com/blog/how-to-write-a-killer-case-study-intro/
Solution: The How & Why

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

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
Results: More than Metrics

It’s not just about numbers.

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

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.
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

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.

Highlights
Challenges
- Brand new launch
- Underperformed targets
- Need to attract a new audience in a highly competitive market
- Unfocused, ineffective messaging

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

Results
- $180K in launch sales
- Nearly 3x improvement in earnings per lead (367)
- "Curl Open" Day 6
  - Win: 14,138 (50.0% of total sold)

"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 creators 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 profile—and we found ourselves in a more competitive market. That’s when our need for a copywriter became apparent, very quickly."

"Tell me more about the copywriter."
Reducing Cognitive Load

MARKETING GOALS

eSUB had worked with other small, one-man shops before which had some experience in SEO and PPC. But they weren't generating a solid return on investment. They approached Directive Consulting to revamp their entire digital approach – starting from the very beginning in building a keyword strategy.

DIRECTIVE APPROACH

We optimized their most profitable pages by targeting keywords that were further along in the buyer's journey. From there, we built backlinks to build page authority and increase rankings. We used third-person ad copy to increase conversions from paid ads and decrease the perception of self-promotional advertisements. By increasing their digital presence via advanced retargeting campaigns, we were able to earn a 3.7 ROI, generating drastic sales growth.

RESULTS

- +756% growth in YOY Organic Traffic
- -65% decrease in cost per lead
- +71% increase in online leads
Is there a “magic” length?

Completion rate was higher when content was no more than 2-5 pages in length.

Info source: https://lp.docsend.com/sales-benchmarks-report
Step 5: Put it to Use!
Repurpose

- **Bite**
  - The Company
  - Challenges

- **Snack**
  - The Company
  - Challenges
  - Case Studies

- **Meal**
  - The Company
  - Challenges
  - Results
  - Case Studies

---

**Case Study Buddy**
✓ Use as lead magnets

✓ Post to social feeds

✓ “How-to” + “Interview” blog posts

✓ Print for tradeshows

✓ Pull testimonials into landing pages
TOFU: Facebook Ads

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!

CASE STUDY

How to build your email list on Facebook on a tight budget

www.agorapulse.com

2,562 people liked. 860 organic, 1,702 paid.
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)
“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
✓ Add near points of friction
✓ Justify an upsell
TOFU/MOFU/BOFU: signature

Joel Klettke
403-804-0493
>> CASE STUDY: See how I helped HubSpot double their conversions

BUSINESS Casual
<copywriting>
Thank you!

@JoelKlettke
CaseStudyBuddy.com/ContentJam