# MAKING YOUR CASE

EVERYTHING YOU AND YOUR COLLEAGUES NEED TO WRITE COMPELLING, LEAD-GENERATING CASE STUDIES

JONATHAN KRANZ

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# WHY CASE STUDIES?

Case studies are the written equivalent of the in-person demonstration, an opportunity to illustrate your product or service in action. The more complex or abstract your offer (attention all "solutions providers" out there) the more valuable your case studies become: their specificity has the power to cut through the fog of business rhetoric. Better yet, they allow your prospects to see themselves in your customers' shoes, encouraging them to imagine what it would be like to enjoy the benefits of buying your product or applying your service.

You can think of the case study as a cross between the testimonial and the business article. Like the testimonial, the case study features a satisfied customer who "speaks" on your behalf. Like the article, it's structured dramatically, with a clear beginning, middle and end that holds your audience's attention through the tension of conflict and the anticipation of resolution.

In format, the case study is simplicity itself. Many are limited to just one page—a brevity that makes them especially useful as trade show handouts, direct mail inserts, supplemental pages to Web sites, and as sales collateral that can be faxed to hot prospects. Most are conveniently divided into three or four labeled sections that telegraph the case study structure to readers, guiding them quickly to the happy ending. These labels go under any number of names, but for the purposes of this ebook—and to illustrate the principles of case study writing, regardless of length—I'll stick to three: Challenge, Solution, Result.


**VISIT THE WATER COOLER VIDEO:**
Why Case Studies?

## How to use this ebook

I've created Making Your Case for two kinds of people: individuals who want to write case studies for themselves or for their organizations; and professionals who want to teach their staff, colleagues and/or associates how to prepare case studies. Either way, Making Your Case has everything writers and learners need to craft successful cases, including:

- Step-by-step **instructions** that cover every stage in the case study process
- **Examples** that illustrate the instructions
- **Advanced tips** that expose trade secrets for more effective writing and marketing
- Hyperlinks to informal **video clips** that explore key ideas in greater detail
- Answers to the most **frequently asked questions**
- **Worksheets** you and workshop participants can use to craft your own case studies

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### *Can I get even more help writing case studies?*

Of course you can. I can help you in two ways:

You can hire me to teach you and your staff how to write case studies and other marketing materials—Web pages, ebooks, direct mail, articles, collateral, whatever you wish. I bring the training directly to your organization, in-house. And every participant receives a custom binder loaded with worksheets and other reference materials so that the learning remains long after I leave.

You can simply hire me to write the marketing materials you need.

Getting started is as easy as contacting me at jonkranz@kranzcom.com or calling (781) 620-1154.

Good luck with your case!

Jonathan Kranz
KRANZ COMMUNICATIONS
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CHAPTER 1

# WRITING THE CHALLENGE

## Setting up the context, problem and stakes

Think of The Challenge as the first act in a three act opera: this is the place to set the scene, introduce the lead character—your client or customer—and present the problem or challenge that puts your story in motion.

Introducing the character and establishing context is easy—just state the facts. In this ebook, ProjectMaster is the company creating the case study (the stand-in for you or your organization), and Widgets is ProjectMaster's client, the customer ProjectMaster wants to write about.

Here's what ProjectMaster might say to introduce its client to readers: "Widgets, Inc. is a $50M industrial design firm serving extrusion plastics concerns in the southern United States." When you write your case study, you may incorporate the facts into a lead sentence, as in the previous example, or literally present them in a list that precedes the body of the case itself. These lists may include:

- Name of the company/organization/client
- Location
- Industry
- Annual revenue
- Number of employees

The latter two bullets, revenue and employees, give readers a sense of scale—the size of the company and, therefore, the relative significance of the case challenge. Should the client prefer to withhold revenue figures, you can say that the number is confidential, or simply not raise the issue altogether.

For the challenge itself, present both the problem to be solved (or the opportunity that may be reached) *plus* the stakes—the reason why the problem or opportunity matters. It's important to understand the difference:

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The **challenge** is the engine that drives the case; it's ultimately what led the client to buy your product or service. It could be a need to integrate account data into an ERP system; an initiative for training new employees; a faulty high-pressure valve that needs replacement.

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The **stakes** are the "so what?" of your case; it's what the client hopes to gain by overcoming the problem, meeting the challenge or seizing the opportunity. For each of the examples above, it could be a demand for improved cash flow; a desire to accelerate employee productivity; or an urgent need to restore production delayed by mechanical failures.

It's not enough to say that Widgets, Inc. had an inefficient project management system. So what? You need to articulate the meaning of the challenge and to do so, you have two fundamental choices:

A **negative** consequence the client wants to overcome, defeat or avoid, such as excessive taxes, customer attrition or broken production facilities.

A **positive** consequence the client wants to obtain, achieve or reach, such as greater customer satisfaction, higher profits or larger market share.

For the purposes of your case study, both options are good. Your choice of a negative or positive stake entirely depends on the nature of the available facts and the client's ultimate goals. In the Widget's example, the stakes could be posed either way:

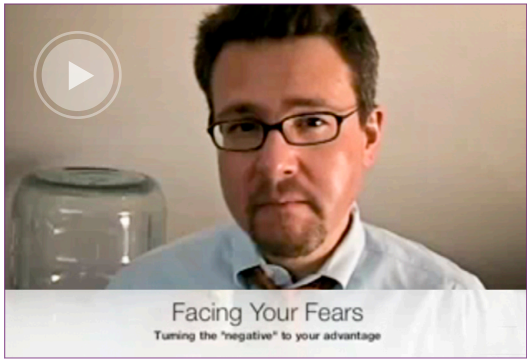
**Negative:** "Widgets CFO Lex Palmer estimates that the company lost approximately 25,000 man-hours a year—or $1,875,000 in wasted resources—through the mismanagement of project-team time, talent and focus."

**Positive:** "According to Widgets engineer Rufus Manchester, a fifteen percent improvement in management efficiency would cut the average project time from six weeks to four, and lead to $0.75M to $1.25M in additional profits for the company."

ADVANCED CHALLENGE TIP

## FIND THE RIGHT FOCUS

The whole point of your case study is to establish credibility. That's why it's essential that the focus of your case be on your client, not on you or your company; on what your product or service did for that client, not on the product or service per se. If you fail to resist the temptation to sell your company, product or service, you'll undermine the empathy you want to construct between the reader and featured client. Any self-aggrandizement will be readily transparent to your readers, who will reject your piece as just another example of blatant self-promotion, rather than respond with the sentiment that leads to sales: "Hey, your company has really helped someone like me; maybe I should give you a closer look…"




**VISIT THE WATER COOLER VIDEO:**
Facing Your Fears

CHAPTER 2

WRITING

# THE SOLUTION

## Putting your products or services on stage

In the middle or second act of your study, The Solution, you introduce the hero: the product or service your company provides that solves the customer's problem or helps them achieve their goals.

This is the scene that brings your company on stage, but remember: your company is not the star. Even its product or service, in itself, should not be the true center of attention. The real hero is not a noun (people, place or thing), but a verb (action): what the company, product or service *does to meet the challenge*; what it does for the client.

Here, your objective is to paint a picture, to illustrate the action so graphically readers can "see" the evolving events in their imaginations. Specificity is critical: every detail you contribute makes the solution more tangible, more real. That's why a broad, vague assertion is insufficient:

*"Widgets, Inc. deployed the ProjectMaster solution across its departments."*

Instead, build the description piece by piece, fact by fact:

> *"First, the ProjectMaster team of workflow analysts, IT network developers, and systems engineers spent a week on-site analyzing Widgets' work processes. The team's subsequent report, reviewed by senior managers at Widgets, formed the basis for a new workflow design. ProjectMaster recommended a wireless networking infrastructure, new collaborative management software applications, and a set of specific policies—tailored to Widgets' unique circumstances—to reduce meeting times and streamline product development. After a one-month trial period with one Widgets department, ProjectMaster deployed the complete solution across the entire enterprise, and established regularly reporting protocols to monitor progress and make adjustments, as required."*

ADVANCED SOLUTION TIP

## TURN GENERIC PHRASES INTO TARGETED POINTS

After you've written your first draft, go on a search and destroy mission to identify unnecessary adjectives and vague generalities such as "cutting-edge technology" or "best practices." Circle them. But instead of mourning the number of ovals in your Solution section, use them as an opportunity—each one represents a place where you can insert a fresh, specific piece of concrete information that deepens your description.

In the previous example, there are at least two general statements that could be improved through greater specificity: "new collaborative management software applications" and "a set of specific policies." I might replace the former phrase with, "collaborative software that integrated far-flung teams, regardless of distance or time differences, and facilitated simultaneous cooperation on centralized documents, eliminating redundant (and confusing) spreadsheets." For the latter, I could define or describe some aspects of the policies, e.g. "procedures that established common workflows, assigned responsibilities and created standard reporting formats."

CHAPTER 3

WRITING

# THE RESULT

## Making the payoff

At this point, your case study should positively tremble with tension. The Challenge established a conflict between "what-is" and the desired "what-could-be." Then the Solution detailed a response to the Challenge. Now every reader will want the payoff: did the Solution work? And what change did it bring about?

The Result is, as its name suggests, an articulation of the results; your job is to present the consequences of the Solution. As you had in your description of the Solution, make the Result as specific and detailed as you can. If the data is available, quantify the results with numbers, perhaps with an amount of money saved (or earned), a percentage increase in productivity, or a dramatic reduction in time or waste.

But whenever possible, put the most important result in your client's words. If you can get permission to use a direct quote, use it—it's the most credible source of information. A great Result quote might look like this:

> *"In just six months, we cut our average design-to-implementation time from six weeks to seventeen work days," says Bill Sharpton, Widgets COO. "With ProjectMaster in place, we're on track to realize an additional $1M in profits this year and an additional $2M next year."*

ADVANCED RESULT TIP

## PUSH YOUR PEOPLE

Your clients mean well, but often when you ask them for a quote about how you helped them, they'll come back with something like this: "The ProjectMaster people were terrific to work with and really helped us a lot." Sure, it wins points for being positive, but it's too vague to be meaningful. Remember, your goal is to paint a crystal clear picture—a window for the reader's imagination. You need specifics. When you get a vague quote, gently push for the particulars by asking questions like these:

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"What exactly did [PRODUCT/SERVICE] do for you?"

*"How did the* [PRODUCT/SERVICE] *work?"*

*"What were the results of using the* [PRODUCT/SERVICE]*?"*

*"Can you quantify the results?"* (THAT IS, PROVIDE OBJECTIVE NUMBERS OR STATISTICS.)

*"What features of the* [PRODUCT/SERVICE] *were most productive or effective?"*

*"What impact do you think the* [PRODUCT/SERVICE] *will have on your future?"*

*"What did you like best about working with* [YOUR COMPANY]*?"*

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Sound complicated? Make it easy. When you approach a client with a request for a quote, offer to write it yourself. As long as the facts are true—and that you've obtained approval by the person the quote's attributed to after you've submitted it to that person for review—the practice not only saves time and trouble, but is entirely ethical.

CHAPTER 4

# WRITING HEADLINES AND SUBHEADS FOR CASE STUDIES

Headlines for case studies fulfill the same duties as those for articles or brochures: they set expectations for the text to come; they whet the reader's appetite by providing a reason to continue reading.

Unfortunately, a quick search for case studies on the Web exposes headlines similar to these:

*Case Study: Widgets Inc.*

*How Widgets Used Project Master*

*ProjectMaster Helps Widgets Save Time and Money*

The first headline is static—there's not even a verb in it to suggest the story to come. The second has a verb, but no implied benefit—why read further? The third offers a benefit, "save time and money," but the promise is overly broad and the headline gives pride of place to ProjectMaster, instead of to the client. (Remember, your goal is not obvious self-promotion, but building trust through credibility.)

## An easy headline formula

There are many ways to write an effective headline. But when you're stuck the following formula will never let you down:

**Client name *plus* verb *plus* benefit *equals* your headline.**

Here's how the formula could work with our Widgets/ProjectMaster case study:

**Widgets** [NAME] **Slashes** [VERB] **Implementation Time In Half** [BENEFIT]

The observant reader will recognize that the above headline features a benefit, "slashed implementation time in half," that circles back to a negative stake (an obstacle to be overcome—in this case implementation delays) articulated in The Challenge. We can just as easily write another headline that spins the same case emphasizing a positive stake:

**Widgets Gains $1 Million in New Profits in Just One Year**

ADVANCED HEADLINE TIP

## APPLY THE POWER OF NUMBERS

Use hard numbers to your advantage: quantifying the benefit lends added credibility to your case study. Odd or non-rounded numbers (as opposed to clean "50% off" or "by more than 100%") seem even more believable: **Widgets Accelerates Time-to-Market by 62.3%.**

### Writing successful subheads

Subheads are simply mini-headlines that identify the sub-sections of your piece. In the case study, they should lead the three elements we discussed: The Challenge, The Solution and The Result. As with headlines, there are many ways to craft great subheads, but this is an easy method that will ALWAYS work:

*Section title plus colon (:) plus summary of section equals your case study subhead.*

In our Widgets example, the set of accompanying subheads might look like this:

THE CHALLENGE:
*Shrink product development cycle, move to market faster*

THE SOLUTION:
*ProjectMaster retools workflows for greater speed and oversight*

THE RESULT:
*Widgets cuts time-to-market, realizes new profits*

ADVANCED SUBHEAD TIP

## SUM UP YOUR STORY

Strong subheads serve two purposes: they break up the monotony of long paragraphs of text, making the document more inviting; and they help scanners/skimmers get the gist of your message at a glance. Read your subheads in succession: you'll know you've succeeded if the subheads, *in themselves*, deliver the essence of your story.

?...

## FREQUENTLY ASKED QUESTIONS

*What if I can't get the client to collaborate?*

You have a great story to tell, but for a variety of reasons (regulatory restrictions, protecting proprietary information) the client isn't willing to participate. Should you proceed anyway by simply changing the background info (name, location)? Or create a similar case study based on a hypothetical situation?

Let's go back to the beginning: the power of the case study is rooted in its reality—a real story about a real client with whom the reader can empathize. When you take away that element of reality, you've just drained the case study of its core value. My advice: if a client doesn't want to cooperate, take what you learned from working with that client and turn it into an article. If Widgets declined to participate, for example, I could transform the substance of the project experience into something like, "Eight Secrets for Reducing Development Cycles and Increasing Product Profits." By doing so, I would be shifting the focus away from the client (the heart of the case study) and unto the working process (the essence of the article). FYI: Writing articles will be the subject of an upcoming Kranz Communications ebook.

*Can my case study be longer than one page?*

Case studies aren't worth anything unless they are read. That's why I advocate a less-is-more approach. In my experience, very few cases really require more than one page—most additional copy is marketing filler.

That said, you're certainly not obligated to confine yourself to one side of a sales sheet. In fact, there are exceptions that merit greater length. When you're writing for a technologically sophisticated audience, for example, you may want to explore issues regarding installation or implementation (probably in The Solution section) in substantial detail—tech people tend to be eager consumers of facts and figures.

*How should I distribute my case study?*

Liberally. Squeeze every ounce of value from your efforts by considering ALL the possible ways of sharing your case study:

- As content to **share via social** media forums such as Twitter, LinkedIn groups, Facebook pages, blogs, etc.
- As a **leave-behind** on sales calls
- **Hand-outs** for conferences, exhibition booths
- **Inserts** in direct mail packages
- **Follow-ups,** via email, to phone discussions with prospects
- As an element in your **press kits** to relevant media/editors/reporters
- As **Web content** that attracts visitors and holds their interest

ADVANCED WEB DISTRIBUTION TIP

## STOP HIDING YOUR CONTENT

Don't make site visitors *work* to find meaningful content. Case in point: navigation schemes that bury great material in "content ghettoes" where testimonials, case studies, reports and articles are left to whither away unread. (Don't believe me? Check your site statistics with an analytics tool that records visitor behaviors.) If you really need a repository that compiles like materials in one place, fine. But don't make the only means of access a visit via a click on a "library" or "case study" navigation button.

Instead, make links to your case studies *throughout your website* so that visitors to your "database integration plug-in" (for example) will find a link to a relevant case study, featuring that particular product, on the product page itself—they shouldn't have to hunt for it among a list of studies in a "library" or "resource center." Got a service-oriented case study? It should have a link on your "services" page. A case study featuring a utility company? Should be on your "energy industry solutions" page. And so on.

# WORKSHEETS

SECTION 1

## THE CHALLENGE

For the background context, provide the fundamental facts about the client:

COMPANY NAME

LOCATION

INDUSTRY

ANNUAL REVENUE

NUMBER OF EMPLOYEES

SUBHEAD FOR THIS SECTION

### THE CHALLENGE

What did the client/customer/subject want (the challenge)?

Why does the challenge matter (the stakes)?

Remember, the stakes can be something positive, a thing you'd want to attain such as profits, savings, fame, popularity, etc. Or the stakes my be negative, a thing you want to overcome or avoid, such as layoffs, cost overruns, taxes, pain, bad publicity, etc. Both are good; your choice depends on the nature of the challenge and/or your client's story.

SECTION 2

## THE SOLUTION

What exactly did your organization, product or service do to meet the demands of the client's challenge?

The key here is specificity, painting a clear picture in the reader's mind of what you did and how you did it. These actions may include (but are certainly not limited to):

- Any steps to analyze, assess and interpret the client's situation
- Reports or recommendations produced as the result of an analysis/ study/investigation
- An outline of resulting action plans
- Products purchased (or leased) to address challenge, resolve problem or achieve objective
- Services deployed to address challenge, resolve problem or achieve objective
- Features of product or service that were especially helpful in accomplishing objectives
- Rollout plan and/or time table for execution/installation/implementation
- Applicable service agreements or support plans
- Arrangements for monitoring/measuring progress or effectiveness
- Follow-up actions to make changes, adjustments or improvements

SUBHEAD FOR THIS SECTION

### THE SOLUTION

SECTION 3

## THE RESULT

What did the customer get as the result of using your product or service? A good Result section should demonstrate fulfillment of the desire described in The Challenge—and as concretely as possible. If you can, get a direct client quote that puts the results in the client's own words.

Results—describe the payoff:


**VISIT THE WATER COOLER VIDEO:**
Giving Feedback—Some Food for Thought

SUBHEAD FOR THIS SECTION

## THE SOLUTION

## ABOUT JONATHAN KRANZ

Jonathan Kranz is the author of *Writing Copy for Dummies* and *The eBook eBook: How to Turn Your Expertise Into Magnetic Marketing Material*, and is a fourteen-year copywriting veteran. A popular writer on numerous *marketing- and copy-related topics*, Jonathan specializes in transforming complex messages into compelling, sales-generating content. His clients include Cisco, Dell, Dow Jones, Fidelity Ventures, Gomez, Harvard Business School, Liberty Mutual, Wausau and many others *too numerous to list*.

*A popular and provocative* speaker, Jonathan offers in-house marketing training sessions that help organizations leverage their internal expertise to establish authority, attract leads and build market presence.

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