

Trade secrets of writing...

Case studies



What's the secret to writing a good case study?

It's knowing the answer to a simple question: what is a case study for?

Is a case study a chance to show off your breadth of capabilities by saying 'we did this' and 'we did that'? No. Is it a place to wax lyrical about your incredible, internationally-renowned client? Again, no – although of course, the client must be happy enough to sign it off.

It is, quite simply, an opportunity for you to **prove** to your **prospects** that you can do something fantastic. For **them**.

'Proof' and 'prospects' – these are two magic words. If you want to sell something to a specific community of interest, you've got to prove to them that they need it, and that you're good at it. Perhaps this sounds obvious, but it's surprising how many case studies out there – case studies that are being written, designed and printed using hard-earned and overstretched marketing budgets, right now – do not fulfil this deceptively simple criteria.

Case studies - the cardinal sins

To see if you may be guilty of missing out your proof and forgetting your prospects, here's a selection of cardinal case study sins that we see committed far too often:

- **Case studies that start by talking (often at length) about the customer's business.**

If you do this right at the start of your case study, it's a real problem. What do 400 offices, 30 countries and 20,000 staff matter until you've **proven** your capabilities? Is £250m turnover and a FTSE top 50 place of interest until you've caught the attention of your **prospects**? No. To add credibility, this kind of material should be in boxes at the side of your document, instead of forcing your reader to switch off from the very start of your case study.

- **Case studies that have a challenge, a solution... and hardly any results.**


This linear format aside (we'll come onto the merits of this and other formats later), what is the use of a case study without any real results? **Proof** is the name of the game. No results proves precisely nothing about what you've done or sold.

- **Case studies with no quotes.**

The voice of the customer is critical in all case studies. You may as well not bother otherwise. Without quotes, all you're saying is "We think we're great". And how does that **prove** anything?

- **Case studies that are just plain dull.**

Long and complex words and sentences, unnecessary jargon, awkward flow of thought from one section to the next... all of these things add up to make a case study that is really, really boring. No **prospect** will want to read it, which means it doesn't make use of your chance to **prove** yourself.



The fact is, a case study that falls into any one of these pitfalls is a missed opportunity. So woe betide those who are guilty of more than one!

What counts as a 'good' case study, however, isn't simply one that manages to avoid these pitfalls; it's much more than that. A good case study is written in the appropriate format to help you meet your **objectives**. The wrong case study format can undermine your competitive edge just as much as the wrong content.

So, how do you decide which case study format is best for your objectives? On the next page we discuss a range of them in turn, and how each should be used to help you achieve your marketing purpose.

Different case studies for different jobs

Supporting case studies - Best for supporting sales situations

Perhaps the most common form of case study is the linear-narrative, 'supporting' case study. These tend to be very formulaic and often follow a variant of the following structure:

1. Who was the client?
2. What was their problem?
3. What was the solution?
4. What were the business benefits / results?
5. Conclusion / plans for the future

This format works particularly well when companies want to add credibility to a sales situation; for example, when a salesperson is trying to sell a particular product or solution, and wants to prove that the theory works in practice. It also works reasonably well in publications aimed at a captive audience – that is, when the readership is familiar with your company and would generally be interested in your products.

However, the structure doesn't have the flexibility you need if you want to catch the attention of a reader that isn't listening – or if you want to persuade the reader to change their mind about something. In such circumstances, it is necessary to grab the reader's attention and maintain it long enough to convey the key marketing messages. The typical 'challenge', 'solution', 'results' format is too restrictive.

Almost certainly, there are a awful lot of case studies out there in this 'supporting' format right now which simply aren't fit for purpose.

Evangelical case studies - Best for grabbing interest and changing opinions

If you find yourself needing to change opinions or speak to individuals that aren't really listening, what you need is an 'evangelical' case study.

Unlike a supporting case study, 'evangelical' case studies do not assume that the audience will be interested in either your company or your products. Written more in the style of a magazine article, they take a generic subject and 'spin' it to resonate with your target audience. This encourages readers to identify with the story, at which point it becomes relatively straightforward to introduce your business which just so happens to be putting theory into practice.

Because they assume no real company knowledge on the part of the reader, they also work very well for PR purposes, for inclusion in magazines and for Direct Mail campaigns. They are also ideal for communicating success and thought leadership to a more senior, CxO audience.

Hybrid case studies - Best for both

Of course, there are no firm rules about the structure of case studies. Between the 'supporting' and 'evangelical' extremes there is a whole gamut of structures which to some extent do both jobs.

Such 'hybrid' case studies work well as printed collateral and may include an evangelical case study and a generic opinion piece, as well as a technical section. This enables them to be useful in both supporting and evangelical situations.

At Writing Machine, we call these "showcase documents", as they do in fact provide a mini showcase of your business and its capabilities. Because they are so self-contained and work well for so many audiences, these documents are ideal to support a range of sales situations, and are excellent as event giveaways.

Business case documents - Best for big stories

Some organisations, however, are fortuitous enough to be able to produce 'business case' documents. These are in-depth, business-level studies – as long as 12 to 16 pages in length – which are designed to make a compelling business case to board level individuals for choosing your organisation.

This is 'fortuitous' because the conditions for writing a business case have to be just right. At Writing Machine, we've produced a number of these for our clients, but we only do it when they fulfil four important criteria:

- Our client has the opportunity to make a board-level sale
- Our client has a really 'big name' customer they wanted to write about
- That customer has been involved in a very interesting and very high profile story – very important
- The story ties in well with our client's competitive positioning at the corporate or campaign level

It's no good producing a business case document if you can only fulfil one of these criteria. For example, if you've just got a big name, so what? Lots of companies do. If it's a really interesting story but no-one's heard of the company, it's probably not worth the effort. And if the story doesn't reinforce any of your competitive messages, why bother?

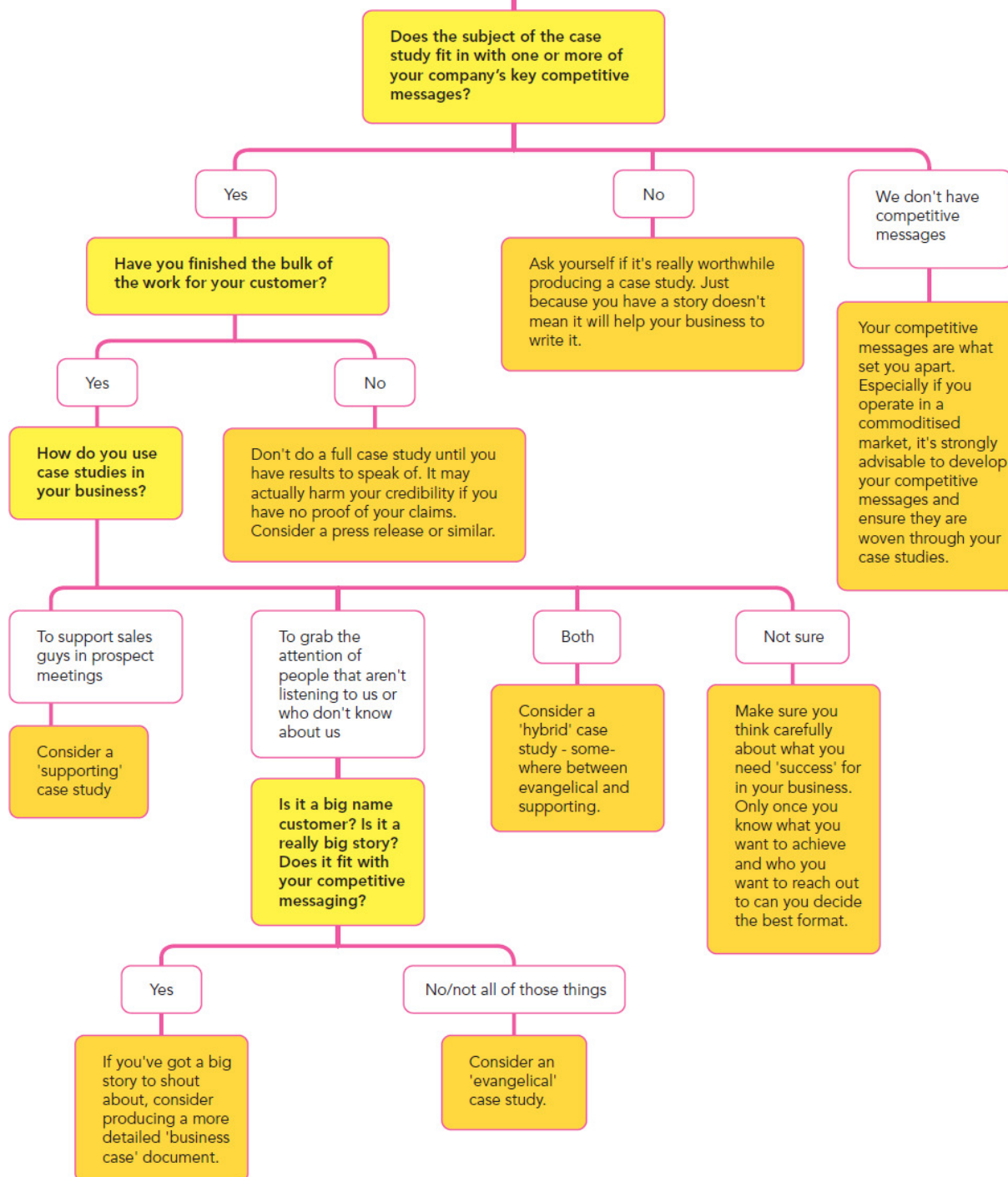
(It goes without saying that if you're not going to get anywhere by talking to the board, then there's no point in writing this kind of case study at all.)

Of course, a document like this will also help to raise your profile in PR terms. However, with budgets as tight as they are it's probably not justifiable to produce such a document for PR purposes alone.

Which case study is right for you?

If you're not sure which case study you need, then why not follow the flow chart on the following page?

Which case study is right for you?





Conclusion

Ultimately whichever case study you choose must be fit for your purpose if it's going to be effective.

The trade secret is this: don't let yourself be constrained by how you *think* your case study should be written. To get the greatest value from your written investment, think hard about your story, your prospects and what you want your case study to achieve, before you decide how to write it.

About the author

Katie Gaines is Editorial Director at Writing Machine.

After graduating from Bristol University with a degree in Spanish and Portuguese, Katie joined Writing Machine in 2003 as a junior writer. Today she leads the writing team.

In addition to copywriting, Katie delivers editorial consultancy to a number of Writing Machine's clients including TomTom, Alcatel-Lucent and Mitchells & Butlers. She has also developed a number of bespoke and off-the-shelf services, including writing training courses, bid writing services and tone of voice consultancy.

About Writing Machine

Clear, Concise, Competitive & Compelling

Writing Machine is a leading provider of writing and training services to marketing and sales departments. We have an impressive client list including organisations such as HP, Nortel, TomTom, BT, Alcatel-Lucent, Siemens, Juniper Networks, QinetiQ, Thales and SITA, as well as many others.

What makes Writing Machine different is the time we take to understand and refine key business messages, right at the start of a project. We then use this to create compelling copy across the entire sales and marketing spectrum, working with web and design partners to deliver websites, corporate brochures, case studies, white papers, press releases, opinion articles, pre-written content for proposals and executive summaries for 'must win' bids.

For more information, please call Writing Machine on 01962 841250.