

Compliments of Your Technical Communication Experts at Freund Associates

Recently, one of our clients asked us to write several case studies for an upcoming marketing campaign. Preparing an effective Case Study or Success Story, however, is not always a slam dunk. More than a testimonial but certainly less than a full-blown marketing campaign, developing Case Studies for our clients has been a staple at Freund Associates since Day One. We would like to offer some help in the way of questions and answers that may help you overcome some of the challenges that will allow you to maximize YOUR success with your customers.

Question 1:

How do I begin my case study?

A: Easy! Think of the last time you overcame a particularly difficult obstacle for a customer. If you went the extra mile, your customer may have thanked you profusely, offering to spread the word about your fine service or product. Here is your chance to accept their gracious offer! Ask your satisfied customer if they would like to be the subject of a Case History. Tell them it may involve a few questions and quotes which can be done easily over the phone. They would just have to sign off on the final copy. Your customer will probably be flattered that you are telling their story, and if they are astute marketers, will realize that this is an opportunity for free publicity for them as well. Win-win!

Question 2:

What if my satisfied customer doesn't want to tell his or her story?

A: We have encountered situations in which a satisfied customer does NOT want to talk about his or her success story for fear of letting the public or more specifically, their competition, know what they are doing to gain an edge. Your option could be to tell your customer that they shall remain anonymous, and the focus will be on how you helped them solve their problem with your product or service. As a Case Study, it can still be an effective story if the success is extremely compelling.

Question 3:

The idea of having a customer gushing over how great our product or service is strikes me as over-the-top self promotion. Is it possible to maintain some objectivity while telling our story in a professional, dignified way?

A: This is where writing an effective Case Study gets challenging. Quite often you or the staff who were involved with the customer are too close to the story to write it in an entirely objective way. This is where the expertise of a third-party interviewing, writing and documentation company (Freund Associates, for example) comes in. Your goal is to get to the point and tell the story using the facts and quotes from the customer that reflect actual information. If written correctly, the facts and the quotes will tell the story, and you will not insult your reader with gratuitous self promotion.

Question 4:

How long should the Case Study be?

A: Generally speaking, an effective Case Study should occupy no more than two sides of an 8.5 x 11" page. Busy business people usually will not spend more than 3-5 minutes on a piece of marketing literature containing 500-750 words. Keep in mind that your Case Study should be more than just words on a page. In order to enhance its appeal and readability, you will want to include some graphics, including your logo (keep building your brand), your customer's logo (if he or she is so inclined to give it), a photo of the customer or your product, or some other generic yet representative image that will make the piece attractive and informative.

Question 5:

What is the best way to distribute a Case Study?

A: That depends on how your customers and potential customers want to receive it. You can ask them individually by phone or via a mass e-mail, but a large contact list may make this impractical. Most business people today rely on e-mail for their information, so you would do well to distribute a version of your Case Study electronically to your database via a blast e-mail. The potential downside of this is that new e-mail filtering products often incorrectly divert marketing messages with attachments to the "SPAM" folder along with the real garbage. Your Case Study may never be received, much less read. This is why it is also prudent to print (use cost-effective digital printing for runs of 200 or less) and mail your Case Study to a pre-selected list of active and potential customers. Nothing replaces holding a colorful, attractive, and informative piece of paper in your hand!

Question 6:

How will I know if our Case Study is effective?

A: First, by simply asking. You've spent some time, effort, and resources in creating and delivering your Case Study. Now, instead of waiting by the phone for calls that are unlikely to come, be proactive and spend some time following up. Pick several representative names (5-10% of your entire list) and personally call or e-mail (without an attachment) to see if your recipient actually received your Case Study. If so, great. If not, resend it. Now, your recipient will be more likely to read it and may appreciate the fact that you followed up. The phone call may even initiate a sales dialogue that has nothing to do with the Case Study. Just like any other form of marketing, it may take repeated efforts for you to begin reaping rewards for your efforts. Send another Case Study in another three months or so to the same list. Also add the media to your list. Continue to follow up and be sure to post the completed Case Studies on your web site for maximum exposure.