How to write a

case study

Writer's JobGuide

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About this guide

This guide is part of a series of professional writing guides written by professional writers for professional writers. In it, we distill best practices proven over hundreds of similar documents. The approaches and suggestions in WritersJobGuide come directly from the ongoing business writing work at a multi-million dollar copywriting agency based in Atlanta, Georgia—Write2Market. They find that great documents share similar properties including:

- High client acceptance
- Minimal revisions
- High willingness of the client to pay for the content
- Better expectation of repeat work for your growing writing practice
- Ease and simplicity of writing by following a scripted set of guidelines

By following the instructions in this guide, you should find yourself:

- Saving time
- Making more money
- Working with greater confidence.

Let's get started!

What makes a great case study?

A case study is the short story of the business writing world.

Case studies, like other short forms such as sonnets and short stories, are among the most demanding professional writing tasks. In one-to-two pages, the writer has to focus a business *story so that the reader is compelled to contact the client* because the reader *now desires the same experience* that the case study presents.

Case studies create credibility for your clients by showcasing a real world example of their product or service in action. In this guide, you'll learn a honed approach that creates muscular, tight documents that will be critical to your client's sales successes and help them regard you as an indispensable professional resource. At Write2Market, we've had clients who remarked that our case studies make the difference in winning large RFPs with national clients such as GE and Boeing. That's the gold standard in case study writing, and the one you'll learn here.

As you approach your case study assignment, realize that the stories you are telling are intensely important to your client. The success story is the culmination of the work of many people who have sold, serviced, and cared for the customer you are writing about. As you write the case, you're actually moving the story forward, drawing a portrait of a profitable relationship between a customer and a client.

This understanding should help you respect your critical role in these business dramas, and help you approach the situation with the gravity, professionalism, and significance it demands.

Key concepts for writing great case studies

- **Research the context of the case**. How *exactly* did your client help the customer? What did the customer need? How did this solution affect them?
- **Interview your client's customer after you are well prepared.** Go straight to the source. Happy customers make the best interview subjects. Let them feel good about what they got and brag about the decision they made.
- **Organize your case study around the reader's pain points.** Why would this example be important to anyone else? What solutions are being provided?
- **Quantify the business scenario, using solid numbers when possible.** Put a dollar on the value of the service provided by your client. Define the ROI in as much detail as you can. Don't neglect to include time and labor in this consideration!
- **Be consistent in use of tone, style, voice, and person**. Don't make careless switches between second and third person, make sure your document has a consistent format, and, as always, quadruple-check your grammar and spelling agreements.
- **Read over your work and edit out sentences that do not directly appeal to *the reader*.** The goal here is to boil down a successful client-customer interaction so that other readers will be interested in your client.

The professional approach to case study writing

The generalized professional approach to case study writing is simple and is outlined in the step-by-step process below. The first part of the process is research. Don't feel like you have to answer every question in the very beginning, however.

You won't write your white paper until you have all the information you need to make your client's case, but research is not a linear path, so don't be afraid to double back, or take your time. As you start asking questions, new, valuable, informed questions will occur to you. Trust your instincts and remember that too much information is a good problem to have.

Firms expect you to spend about 1/3 of total project time on research. If you're working directly with a client, use this time frame as a guide, and be sure research in the delivery schedule.

The second section, about the writing process, discusses the tricks of the case study format. This section also contains a few tips about protecting yourself from computer data loss.

And, finally, the last section is a simple list of expectations you should have for dealing with clients or development firms after you've crafted the first presentable draft of the white paper.

Process overview

In writing a case study, the order of operations tends to follow this logical progress:

1. Assignment
2. Research and background gathering
3. Interviewing your client's client
4. Organizing the information around the reader's pain points
5. Drafting the case study
6. Revising and editing the case study
7. Presenting it to your client
8. Making any suggested revisions

Before you write—the research phase

A. Determine your ideal reader.

The reader of the case study needs to be in your mind as you craft every sentence. As we mentioned, short forms are particularly challenging. Now you see why: there is no room for exposition, or any chances to get tangential. Readers want meat from beginning to end.

Your case must be compelling, relevant, and interesting to the reader over all. The reader is not our client, nor is the reader your editor. The reader is ***the person the client is selling to.*** Another way to say it is that the reader is the "target market." To write to this person, you have to spend a little time getting to her.

Find out the answers to questions like:

- **What are typical titles of the reader?** Are you writing to the CEO or the accountant?
- **What is their work life like?** Are they constantly pulled in a million directions, or do they have one major concern for the entire day?
- **How stressed are they, and about what?** What are they responsible? What is going on in their market right now?
- **What pains them about their work day?** That is, what aspects would they like to remove? What aspects would they increase?

B. Uncover the reader's needs.

Learning about your readers should help you uncover 3-5 top **NEEDS** of the reader. These **NEEDS** are high level, surface issues that exist on the top of the reader's mind. They are sources of anxiety and stress.

Generally speaking, you can ask your client these sorts of questions:

- What are the **PAIN POINTS** for our target audience?
- What is their **ROLE** in buying your product or service?
- How much **TIME** do they tend to spend on a purchase like this?
- What sorts of things are most likely to **DISTRACT** them?

For example, in reading about CEOs, you may discover they **NEED** confidence in their relationships with the board of directors.

You may additionally deduce they **NEED** more **TIME** because their days seem **OVERSCHEDULED**.

You may also find out they **NEED** clear and accurate reports about their company.

State your readers' **NEEDS** to yourself so that, as you angle for the best way to write the case, you can write to the reader's **NEEDS** and tune the presentation of the story to their interests and desires. For example, if you are writing about an accounting system, and you are writing to an audience of CEOs at midmarket firms, you will want to cite the features that save time, make it easier to communicate financial date, make it easier to see warning signs, and make it easier to see real time company financial performance with simple reports.

In this case, you won't need to tell the reader about the system's ability to run on Windows or Unix systems. While that is important to CIOs, compatibility is not a **NEED** of CEOs. So, as you can see, the **NEEDS** of your reader provide the outline of your case study. You could call them the backbone of the case study, around which you can ask questions, develop key for, and weave supporting evidence.

Your task in the research phase is to look at a lot of information and separate out the information that is important to the reader because it addresses their "pain." There is an overabundance of business facts and disinformation available to most buyers. Your role as a professional case study is to help your client get information to the reader, without wasting time with superfluous detail. Winnow away those details that would distract them with data.

Just because something is factual, that doesn't mean that it is necessarily relevant to the story you're telling right now.

C. Read up on the industry.

Every industry has its buzzwords and concerns. Scanning the trade journals' cover stories and visiting a couple of news sites about the industry should arm you with any top of mind issues facing your client, and their customers.

Use this information to make sure your case is written in the appropriate **CONTEXT**.

- Create a folder on your hard drive for interesting articles you find to support your case. Your client may want to see your source file at some point, and having it shows your professionalism. It also starts a file for you on certain types of readers.
- Read your client's web site, as well as some results from a simple Google search.
- Consider setting a Google Alert on any particular service or product names relevant to your case.
- Go to two or three of your client's competitor's sites so you can learn from them. Learn how they position themselves, so that you can position your client's story in a truly unique way.

D. Develop questions for the interviews.

Armed with context, a basic understanding of the reader, the industry, and the client, it's time to develop detailed questions.

Your questions should focus again on the reader's needs, and how your client meets them in the specific case of "this case study." Your interview subject should be encouraged to talk about how your client solved their problem in both tangible and intangible ways. Do your best to quantify the solution.

Here are some common ways you can help quantify the information you're getting.

- **Did my client's solution save you time?** How much time? Get a number.
- **Did my client's solution save you money?** How much money? Get a number.
- **Did my client's solution protect an asset or mitigate a risk?** How disastrous financially would that risk have been? Get a number.
- **Did my client's solution allow you to redeploy some of your workforce on core tasks?** How many days or hours a week were saved? Get a number.

Sometimes your client may want to review your questions before the interview, and that's fine. But, even if they don't want to see them, don't conduct any interviews without having questions at hand.

The fact is, your case study will only be as good as the answers to your questions, so put some thought into what you need to ask. Often we find that the person we are interviewing loves the service or product for reasons that our client doesn't even realize. Encourage the interview subjects to brag about themselves and their sharpness in finding, and buying, our client's offering. It is to their credit that they have a successful business relationship—probe the interview subject for the real reasons why working with your client is so satisfying. Often you won't be surprised—but sometimes there's a gem of advantage that even the client doesn't realize.

As the writer of a compelling business case, it's your goal to find out the real needs that your client is meeting so you can reflect them to your reader, and hopefully create buying triggers.

You probably noticed that every bullet above ended in "get a number." You do not want to leave an interview without some quantifiable number. You do not want a case study filled with phrases like "a lot" of money. Readers are suspicious of language like this and numbers give you credibility.

E. Schedule interviews.

While some interview subjects are so laid back all you have to do is pick up the phone and get an interview, others are busy people that prefer you schedule them a week in advance. Go with the flow—remember the interview subject is making time as a favor to your client. You may want to gently let them know the case will reflect well on them, their industry, and their employer and that you'll make sure they have a chance to review it before it's final. Great phone manners, a big smile, and an upbeat attitude—along with a lot of flexibility—help make these interviews go well.

Consider:

a. Using Outlook Appointments (or the free Google Calendar) to set schedules

b. Remind your interview subject with a friendly email before the call

c. Put some of your interview questions in the calendar event so they are able to mentally prepare to talk with you

F. Conduct and record interviews.

If you need to set up a teleconference with several people, we're a big fan of the free conference call service at FreeConference.com.

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Many writers prefer to record interviews, and WritersJobGuide strongly encourages this. We recommend you use Audacity, free recording software you can download and install, or some other simple solution that keeps your hands free and your mind on the subject matter. You can save your interviews in convenient MP3 format by installing a plugin. In the information below, the plugin is referred to as "LAME", which is the name of the encoding software.

Interview recording software links

- Audacity download page
- Audacity plugin instructions
- Audacity plugin download

As you write

A. Write the case.

Writing the case is generally a breeze with as much preparation as you've done. Be led by your target reader's point of view, perspective, and needs. For example, if your reader is **HUNGRY**, then whatever you're writing about, you find support for it being 100% satisfying, delicious, and quick. In this way, the needs of the reader lead the exposition and development of the case.

B. Save your work.

Although many word processor programs automatically save documents to your local hard drive, if your computer system fails, you'll be left in the cold. Do yourself a huge favor, and use an online backup tool, such as the ones listed below.

- Mozy (2GB free, paid upgrades available)
- DropBox (2BG free, paid upgrades available)
- MicroSoft Sky Drive (25GB free)
- SyncBack SE (free software for those that already have FTP space)

C. Provide case to interview subject for fact checking

At some point, you'll want to provide the case to the interview subject to make sure they're comfortable with their quotes. You can use email, and some writers just send the subject's quotes for approval.

Whatever the requirements are for your interview subject, remember to never quote someone without approval. Even if your interview does not specifically ask to see what you've written, send an email containing the quote and a request for permission.

Case study must-haves

As you review your case study, make sure you have incorporated some of the following hallmarks of superior work:

1. **Good storytelling** . While you don't want to waste time with superfluous exposition, you also don't want a dry story with nothing happening. Odds are you can hear how proud the interview subject is with themselves. Use that and tell a really great motivational story.

2. **Good use of grammar and punctuation**.

3. **Including a lead quote or testimonial.** Try to use a quip from an interviewed source that is repeated within the body of the text.

4. **Including a results summary**. The results area is composed of three or four benefit or advantage statements—these are the high level bullets that explain the meat of the case. These bulleted statements or phrases should showcase how your client helped the firm in the case study. Like the rest of the case study, these points should be written in such a way that they appeal to the **READERS'** needs.

5. **Including a challenge or problem summary.** The **challenge summary** that explains the problem to the reader, using a point of view that empathizes with the reader.

6. **Including a compelling, interesting title** that leads with an answer to a need that you **KNOW** the reader has.

7. **Including boilerplate,** and "About the Client" section. This is one paragraph of copy about the client, including a few notable facts and contact information. Because case studies are meant to sell, a case study without contact information is like a fish without gills.

8. **Including a call to action.** Each case study should encourage the reader to respond to something specific. Many times, these are in the left or right margin of the case study, or at the bottom. "Increase your own dog food sales. Contact a Wildwood representative at 888.232.7777;" "Take charge of Board of Director meetings. Download an AccountPro demo at www.accountproD.com."

Let's go through an example.

Pretend your client is a dog food manufacturer, Wildwood Foods. The manufacturer wants to encourage sales through the boutique pet shop market. The manufacturer decides to write some case studies about how their product works in these types of stores. They select a customer, Blue's Dogs and Togs.

Which advantage statement is **NOT** reader-centric, and would not make it to your final case:

a. Wildwood foods became the bestselling brand in the store almost immediately, increasing overall dog food sales 20% in all four of Blue's locations.

b. Wildwood's coupon program increased food traffic to Blue's 15% last quarter, resulting in a substantial sales increase of dog food—but also treats, toys, baked goods and impulse items.

c. Sales of Wildwood foods to boutique pet shops doubled from $500,000 to $1 million in 2007.

d. Profitability on each sale increased an average of 10% because Wildwood monitors its own shelf space, keeping the store's administrative overhead down.

The "c" statement—that sales of Wildwood doubled—has impressive numbers but should not make it to your final case. While it's true, the reader—presumably a pet shop owner—doesn't care about THAT.

After you write

A. Proof your work

Don't rely on the revision process to save your case study. Clients and content leads don't like getting case studies filled with errors. To put it another way, don't "bang out" a study and send it over. Comb through the information, double- and triple-checking quotes and data.

The first draft your client or content lead sees should be pretty shiny. Verify document and template consistency, keeping an eye out for margin and list-numbering errors. Try reading the document in reverse, which encourages you to bring a new set of eyes to your work.

B. Turn in your work on time

Being late with your document is always bad. If you're working for a content development firm, it slows down the internal editorial process, putting pressure on everyone else, and possibly delaying delivery to the client. Your due date is important to the success of the firm and, thereby, the client.

If any document is late getting to a client, it can mean missed submission deadlines, which hurts clients and, by extension, you.

C. Wait for revision requests

You will probably have revision requests. Don't take it personally. Editors at content development firms are hired to pick through your documents and make sure everything is perfect before the documents go out. As you work with a document, it is common to gloss over seemingly small errors. But seemingly small errors can cause huge problems.

Clients may also request revisions. As the writer, you are the expert on the writing, but the customer is the expert on the message they want to send.

See this methodology at work

All of this methodology is a lot easier to understand when you see actual examples. You can find many examples of Write2Market –style case studies on our web site, www.write2market.com.

Sample case studies

We've provided a couple of sample case studies so you can see a couple of approaches to distilling benefit statements and result statements.

Sample Case Study A

Title: National Fuel Program Cuts Costs, Improves Quality

Pull quote: "They have become a one-stop-shop for all of our fuel and logistics needs..." *Mike Nolte, VP of Maintenance, Durham School Services, a division of National Express Corporation.*

The Results

Best pricing on fuel. Durham uses 600,000 gallons per month, saving an average of $.15 per gallon over retail. This translates to an annual savings of $1.1 million.

Savings through service. Mansfield manages repairs to fuel systems, minimizing downtime and assuring the job is done right. Durham has decreased maintenance costs on average by over 15%.

Greater efficiencies through using one vendor. By using one vendor, efficiencies are gained by minimizing data entry, standardized invoicing, as well as volume pricing.

Cost control through better inventory management. Durham knows how much fuel they have, where it is and when they are using it, avoiding run-outs. If tanks are dry and they need to purchase fuel retail, their fuel costs rise an average of 7%.

The Challenge

As one of the largest providers of school transportation systems, Durham operates in 28 states. Internal growth and rising fuel costs are just two reasons they sought efficiencies through a national fuel program. But first they needed to find a vendor who could operate where they did. "We have locations that are very rural, some that are suburban, and some in the inner city. We needed to find fuel suppliers and deliverers that could meet our needs," shared Nolte. He also needed a company that understood regulations by state and area. Durham wanted assistance with all facets of their fuel management: fuel delivery, fuel brokerage, environmental assistance, inventory management, data gathering and analysis, and maintenance. They needed all of this without sacrificing quality. They turned to Mansfield, the one company who could deliver.

The Mansfield Full Service Solution

By setting up a national fuel program with Mansfield, Durham was able to stabilize their rising fuel costs. "Because we bid on fuel in 3-5 year contracts, working with Mansfield has had a huge impact on our fuel costs," said Nolte. With the most comprehensive fuel network in the nation, Mansfield has supply and distribution agreements with all the major refiners. By tracking over 200,000 price changes daily, they can offer Durham best prices on a quality product.

"A quality product from Mansfield gives us the comfort of knowing the fuel is quality, the additive is quality, and the maintenance costs related to poor quality fuel won't be there." Providing quality fuel is just one way that Mansfield helps Durham control costs and meet environmental compliance. They also provide automated tank gauging (ATG) that monitors tank inventory, detects leaks, and assures the system operates within regulatory guidelines.

Control your rising fuel costs through a national fuel program. Contact Mansfield at 1-800-695-6626 to find out how today.

Sample Case Study B

Rural America Capital Group Helps Rural Hospitals Improve Communities with More Capital, Better Rates

"Rural America Capital Group was an integral part of the team that made this dream of building our new 54,000 square foot hospital a reality. The process was amazingly simple. This is the perfect example of how having the right people executing a project of this magnitude makes all the difference." — Michael P. Kircher, Chairman of the Board, St. James Health Services, St. James, Minn.

The Challenge

The Board of Directors at SJHS knew it was time for an overhaul of their rural community hospital. Some areas were suffering from leaks so severe that plastic swimming pools were positioned in the hallways to capture rainwater. The board knew that the USDA backed loans at excellent rates to rural hospitals, but also knew getting federal approvals would be a difficult, time-consuming task. They turned to Rural America Capital Group and their partner Morgan Keegan for help.

The Results

- Major new 54,000 foot hospital for St. James, Minnesota
- $16 million dollar loan secured at competitive rates
- Hassle-free loan process completed in just a few months
- Hassle-free bond offering lowered overall cost of debt
- Loan guaranteed by USDA

The team at Rural America Capital Group made it possible for St. James Health Services in St. James, Minn., to obtain a USDA-backed $16 million dollar loan with rates comparable to a tax-exempt loan. St. James Health Services (SJHS) grand opening of their new 54,000 plus square foot facility is scheduled for early December 2007 and will feature state of the art medical technology to provide their rural community with the best possible care.

"I never thought it was possible to take our facility from an antiquated, inefficient facility to serving our rural area with a state of the art hospital — but thanks to the team with Rural America Capital Group, we'll open our new facility in just a few months! "— Michael P. Kircher, Chairman of the Board, St. James Health Services, St. James, Minn.

The Goals

St. James was clear about their goals for the new facility:

- To replace the current hospital (built in 1957 as an in-patient hospital) with a new facility focusing on outpatient care with cutting-edge technologies to serve the community.
- To build the new facility without having a referendum to raise taxes in the small, rural community.
- To secure a USDA-backed loan for $16 million dollars at rates comparable to a tax-exempt loan to rebuild and replace their current facility.

The Solution

On behalf of the St. James community, Rural America Capital Group, through their partnership with Morgan Keegan, worked closely with the USDA to secure a loan that covered the construction costs of the new building. The rural financing experts at Rural America managed all the local and federal approvals for the loan.

"Rural America Capital Group specializes in rural hospitals, giving us a unique perspective on the needs, concerns and staffing constraints faced by rural hospitals," said Richard Horn with Rural America Capital Group. "Our goal is to work with these hospitals to help them serve their communities by improving their facilities and technologies through loans with favorable interest rates and a simplified process."

Rural American Capital Group can help your hospital — and community — reach their health care goals. In fact, our recently published article, "How to Break Ground On Your New Facility, is available for download. For more information on helping your community grow, visit www.ruralamericacapitalgroup.com.

More resources for your writing

See the complete library of writers' resources and job guides at www.writersjobguide.com.