Delivering Case Studies at Scale

Guidance and templates to build a world-class case study program

Everyone recognizes the importance of Case Studies. Providing an in-depth explanation of your customer's strategy, the challenges they were facing, and the value your product or service delivered to them is very compelling to buyers. However, getting Case Study programs up and running, and continuing to deliver great content on a regular basis, requires considerable time and effort.

The **BPM Case Study Toolkit** provides an approach and guidance on how to go about building a world-class case study program – together with supporting resources such as email and document templates.

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Summary of activities and BPM resources

01

Recruiting Customers

- Hints and Tips on recruiting customers *(see below)*
- Customer Case Study Email Outreach template
- Customer Case Study Consent Form template

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02

Preparing for the Interview

- Hints and Tips on research and preparation *(see below)*
- Email template on the interview structure – to send the customer
- Input Document to Gather Information and Capture Insights ahead of the call

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03

Interviewing the Customer

- Hints and Tips on how to conduct the Customer Interview *(see below)*

04

Writing up the Case

- Hints and Tips on writing it up *(see below)*
- Structure and format for writing up the Case Study

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05

Getting Sign-off

- Hints and Tips on getting customer sign-off *(see below)*
- Email template for reaching out to the customer for sign-off

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06

Building out multiple case study assets including video

- Hints and Tips on creating case study assets *(see below)*
- Shorter form template for PDF or web page
- Template for PowerPoint case study slides

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Hints and Tips

1. Recruiting Customers

- Prioritize personas and workflows where you see the most potential for growth.
- Leverage senior executives and successful sales people at your company to identify candidates for case studies.
- Position cases studies to customers as a way of sharing insights and industry best practices with peers / other leaders.
- Use an Outreach email to build a pipeline of case studies opportunities.
- Avoid procurement professionals who are likely to be less compelling to your target audience.
- Ensure there is 100% clarity early in the discussions with the customer that this will be a named case study. Studies that feature the customer's name are 10 times more useful in the sales process, so don't waste time on anonymous case studies.
- A signed Consent Form gives you permission to use the case study materials externally. Get formal consent before the process starts!

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- Customer Case Study Email Outreach template
- Customer Case Study Consent Form template

2. Preparing for the Interview

- You MUST do your homework ahead of the interview.
- Use a document (internal only) to gather insights you may want to test / validate and to structure the conversation during the interview:
  - Person/Organization
  - Background
  - Challenges/Opportunities
  - Project/Solution
  - Benefits/Value
  - Partner/Service
- Start off by gathering and reviewing background information, materials, deal information, etc.
- Then interview the salesperson who sold the deal along with a pre-sales specialist where involved.
- Never assume the sales team has the whole story especially around the precise challenges the customer was looking to address.
- If you have a messaging framework for the product set involved, review the typical challenges solved for the relevant use case, and be prepared to explore these in the interview.
- Research the customer on LinkedIn and their website.
- You CANNOT just arrive at the interview and ask the customer to tell you all about the deal. To get the information you'll need to write a compelling case study, this has to be a structured conversation.
- Send the customer an email with the interview structure ahead of time (there is a BPM template for this) so they know what to expect.
- If you plan to talk to more than one person at the customer, ensure you interview them at the same time.
- It is recommended that you don't share the document you have used to prepare for the interview – it can be a distraction from a more natural conversation and may have insights that are incorrect / need to be clarified.

The call is being recorded so you can move quickly and listen to the exact language used by the interviewee later to write up compelling quotes.

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- Email template on the interview structure – to send the customer
- Input Document to Gather Information and Capture Insights ahead of the call

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3. Interviewing the Customer

- You've done your homework, so don't be intimidated and try to enjoy the process! Most customers are delighted to talk about topics where they are experts, and really like having these conversations.
- Suggested conversation structure:
  - Start by explaining who you are, the purpose of the call, and that the interview will take 30 to 45 minutes
  - Ask the interviewee's permission to record the interview, so you can move quickly but later check points if necessary. Explain that the recording will NOT be used in any other way.
  - Thank the person for participating and ask them to say a little about who they are and their role
  - Next ask the interviewee to talk through the background to the project / purchase – what were the high-level drivers, were there opportunities to do things better or challenges that needed addressing?
  - Ask the interviewee what were the factors behind their choice of product / solution and the business benefits they are expecting / are achieving
  - Briefly set out the end-to-end case study process

- **The call is being recorded** so you can move quickly and listen to the exact language used by the interviewee later to write up compelling quotes.
- Conduct the interview in a relaxed conversational style, but ask follow-up questions.
- You may need to suggest possible challenges and opportunities based on your preparation work, as customers often need help articulating precisely what the drivers for a project were.

- **At the end of the interview explain what happens next:**
  - You will be pulling the output captured together into a Word document which will be sent to the interviewee for sign-off
  - Commit to a timeline and deliver against it. Speed is important to keeping momentum – turnaround time for a draft for their review should be two weeks or less.
  - Identify any additional follow-up needed, e.g. an up-to-date photo.

- Customers are often keen to help you by suggesting you also talk to someone else at the company. Tempting as these offers are, avoid doing follow-up calls with other people at the customer unless absolutely necessary – this is guaranteed to slow things down – so you should politely decline if possible.

4. Writing up the Case

- Start by writing up a full-length case study. This will provide sufficient detail for the Case Study to be leveraged in multiple ways – on the website, in the sales process and in learning programs.
- Different teams can then extract elements from the full-length case study to create different end deliverables.
- Avoid a narrative style as this can be difficult to re-work for different deliverables.
- Instead use clear sections with headers, bullets and lots of direct quote that can easily be re-used in multiple situations.
- Include a synopsis designed for use on website pages and presentation slides.
- Take time to consolidate similar ideas and drop content if it is marginal to the overall story you are looking to tell.
- Where possible the opportunities and challenges faced by the customer and the benefits delivered should align with the value propositions featured in your messaging framework for the proposition concerned.
- Include complimentary descriptions of the customer organization and relevant parts of their strategy as well as a short bio on the featured executive.
- A BPM template is available, which provides an example format that you can use or modify as you wish.
- Make sure you update you core messaging framework to incorporate any fundamental new insights or ideas for value propositions that have come out of the case study work.

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- Structure and format for writing up the Case Study

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5. Getting Sign-off

- Ensure you have socialized the Case Study program with internal stakeholders but identify one person who can sign off the copy for your company. Get this done BEFORE you send the draft to the customer. Going back to the customer and asking them to sign off a second version is likely to annoy them and potentially lead you to lose the Case Study.
- Get a copy of the draft full-length case study to the customer with an explanatory note as soon as possible to maintain momentum.
- Of course, the customer organization may take some time to sign off the draft depending on their internal processes. But as you will already have a signed Consent Form for the case study in principle, getting sign-off for the final copy usually won't take that long.

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- Email template for reaching out to the customer for sign-off

Consider extending the Case Study with a video interview.

6. Building out Multiple Case Study Assets

- Once you have a signed-off full-length case study, creating other deliverables is relatively straightforward.
- Re-work content as necessary to create shorter form copy for web pages, short PDFs, PowerPoint slides, etc.
- **Consider extending the Case Study with a video interview.** There are different options (full studio versus remote video call) depending on your budget.
    - Do the video interview after you have the signed-off full-length case study.
    - Develop a Video Outline and share this with the customer to give them a heads up on the interview structure and some talking points based on what they have already told you. This is NOT a script.
    - Keep the interview simple, don't try and cover every detail.
    - The end result will be more compelling if you feature an interviewer – someone in marketing or a senior sales person or an outside interviewer – rather than just having a 'talking head'.
    - Ask for corporate video footage that could potentially be included in the video package.
    - Create a shorter 30 second version for social media.

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- Shorter form template for PDF or web page
- Template for PowerPoint case study slides

BPMWORKS

- BPM provides a methodology, expert services and specialist toolset for capturing customer insights and developing go-to-market messaging for B2B propositions.
- We also create interactive sales playbooks, microlearning and other tools for sales enablement.
- Customers include CenturyLink, ICE Data Services, LexisNexis, Reed Business Information, Refinitiv, and Thomson Reuters

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