



## The Case for Case Studies

Whether you call them case studies or customer success stories, they are probably your best marketing asset. If you are not convinced, read on. This whitepaper presents a simple yet effective step-by-step approach to maximize the effectiveness of your Customer Reference Program and to make sure it helps you reach your revenue objectives.



## What's a case study?

A case study is a STORY that should convince your prospects to do business with you. To do so, the story should invite prospects to place themselves in the same situation as one of your clients. The story demonstrates why you are better than your competitors and the tangible benefits your prospective clients can expect from hiring your firm. That said, you want to tell the story in such a way that the prospect identifies with your client and thinks "That's exactly how I feel!" According to case study expert, Gail Martin<sup>1</sup>, this emotional link is the key to producing a compelling success story because emotions motivate prospects to take action.

The format and length of case studies vary greatly. As usual, quality trumps quantity, but most success stories do not exceed two pages. Also, with the increasing popularity of social media and websites like YouTube or iTunes, you will probably find more and more videos and podcasts featuring customer success stories.

Feel free to include customer testimonials in your case studies, but beware that a testimonial in itself is not a case study because it usually focuses on specific aspects of the story and therefore rarely builds reader identification.

## The many benefits of case studies

There are many benefits to creating case studies, from clarifying your value proposition, to increasing your firm's credibility, to supporting your other marketing activities. All that for a relatively low cost compared to other marketing tools.

Case studies are an excellent way to express your value proposition since they should give some indication of the typical results clients can expect. That is probably why salespeople love them. They give a straight answer to the question: "Why should you do business with us?"

Besides, your customers' words have much more credibility than your own, especially if you use your clients' real names and not some vague description like "an important pharmaceutical company in the Montreal area." You should also resist the urge to brag about your organization,

and emphasize results and tangible benefits instead. That way, you let your target audience draw its own conclusions, which is much more powerful.

Another key benefit of case studies is their relatively low cost, especially compared to a golf tournament or an advertising campaign. Not to mention, you can use case studies multiple times because they integrate seamlessly into your other marketing activities. For example, you can post them on your website, distribute them at a trade show or use them as offers in your direct marketing campaigns. As a result, you can spread the cost of developing a case study over several marketing campaigns.

Nevertheless, if you really want to leverage case studies to reach your goals, you will probably need more than one, which leads to the idea of a Customer Reference Program. When you develop case studies as part of a Customer Reference Program, you adopt a more strategic approach right from the beginning. And if you really want to maximize your investment, you just need to follow a few simple rules.

## RULE #1

### Set goals based on your strategic objectives

To avoid developing the wrong customer success stories, you should align your Customer Reference Program goals with your corporate strategic goals. Consider choosing the client or the story that would have the most business impact instead of jumping at the first response: "Mr. Jones agreed to participate in a customer success story, we should call him right away!" In this example, you are not carefully selecting the best customer to reinforce your message but reacting to a so-called opportunity.

Instead, focus on establishing the profile of the ideal candidate based on criteria such as industry or vertical market, size of the company, geographic area, etc. So if one of your strategic goals is to expand into the United States, you should try to highlight how you have helped US customers. Choosing the right customer means supporting your overall sales and marketing efforts to penetrate new markets. Additionally, an ideal candidate profile will help you clearly communicate to other internal departments the type of customers/stories you are looking for.



Once you have established clear goals, you can review the marketing tactics you have already planned to achieve your strategic objectives and determine how case studies could best integrate with or complement those activities.

## **RULE #2**

### **Map your case studies to your clients' buying cycle**

The first question is “Do you know your customer buying cycle?” While the customer buying cycle varies by organization and industry, it typically includes at least three phases. During the first phase, the prospect becomes aware of his challenges and admits there is a pain. In the second phase, the prospect starts envisioning solutions and evaluating options. And in the third phase, he establishes specific criteria to select a business partner.

So, case studies that emphasize business results and potential benefits would help spark the interest of prospects who are still in phase 1 or 2 of the buying cycle. Whereas a customer success story that focuses on what differentiates you from your competitors by highlighting your great customer service or super-fast response time would be more appropriate for potential customers who are in phase 3.

## **RULE #3**

### **Adjust the case study to your target audience**

The style, length and format of case studies vary greatly depending on who you are targeting. The more you know about your target audience, the more relevant your customer success stories will be.

For example, if you intend to share your customer success stories with a technical audience, you will probably try to include lots of technical details. On the other hand, if you would like your case studies to capture the interest of CEOs, you will develop case studies that are concise and to the point, and focus on bottom-line results.

Likewise, if you know your primary audience, you are more likely to pick the right format for your case studies. For example, young people may prefer video case studies whereas a more traditional audience may prefer a printed format.

## **RULE #4**

### **Include a Call to Action**

A good customer success story should lead your prospects to take action. The idea is therefore to make things easier for them by clearly identifying the next step. In other words, if you would like a prospect to contact you, make sure to include your contact information on all customer success stories. Similarly, if you post your case studies on your website and the next step is for your prospects to request a free business assessment or a free trial for 30 days, make sure to include the links to the relevant pages on your website.

Your call to action is the foundation for the success of your strategy and makes all the difference between case studies that deliver results and those that don't. Do not neglect this important aspect.

## **RULE #5**

### **Create case studies that have style**

You've probably heard that you never get a second chance to make a good first impression. Your case studies should have a nice visual appearance because some clients will interpret this attention to detail as an indicator of your level of professionalism.

Check that your content is well organized, well written and easy to read, and of course, without any spelling errors. Avoid blurry logos and images, as well as fonts that are too small or hard to read. Select a good quality paper and a professional printer.

If you decide to develop audio and/or video case studies, you will probably need to contract the services of a professional because they usually have the necessary equipment and expertise. Although you can create your own “Blair Witch Project”, it may not be appropriate, in a business-to-business environment.



## **RULE #6**

### **Spread the word!**

It is probably obvious but the success of your Customer Reference Programs depends largely on how you intend to use your case studies. Sales and marketing people usually love customer success stories, but they can be an excellent tool for other departments as well. Imagine that you would like to implement up-sell and cross-sell programs targeting your existing customer base. Then, customer service representatives could easily refer clients to customer success stories.

A solid internal communication plan can make all the difference. In addition, if you want to facilitate the widespread use of case studies, you should consider maintaining a central repository, whether that is on your website, business portal or CRM application. As your Customer Reference Program grows larger, you will probably add search functionalities by name, industry or vertical, phase in the customer buying cycle, product line, country or province, etc.

## **RULE #7**

### **Start over**

Your Customer Reference Program should be ongoing. Your product line evolves, your strategic focus will shift, and over time you will simply need to replace the older stories with new ones. Besides, you typically need between one and three months to complete a case study: from the moment you obtain the client's approval to initiate the project, to the final document approval. Thus the need to have a couple of projects continuously in production.

## **Conclusion**

Case studies can serve as a very powerful marketing tool but they are often not used to their full potential. The results you will obtain from your Customer Reference Program depend largely on your expectations and how you will put your case studies to work for you. If you use case studies like any other flyer, chances are they will not help you reach your revenue objectives. But, if you systematically integrate customer success stories to your other marketing activities, they will reinforce the overall effectiveness of your strategic initiatives and really impact your bottom line-performance, at a relatively low cost.

There is no better way to tell a story, and people love stories because they can relate to them. Case studies are probably the only marketing tool that can create such a strong emotional bond; and since most people make decisions based on their emotions, customer success stories are probably your best asset in convincing cautious prospects.

#### **Reference:**

1. Martin, Gail. Telling a Story that Sells: Case Studies with Heart. February 14, 2008. <http://www.marketingpros.com/marketing/online-seminars/163>



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