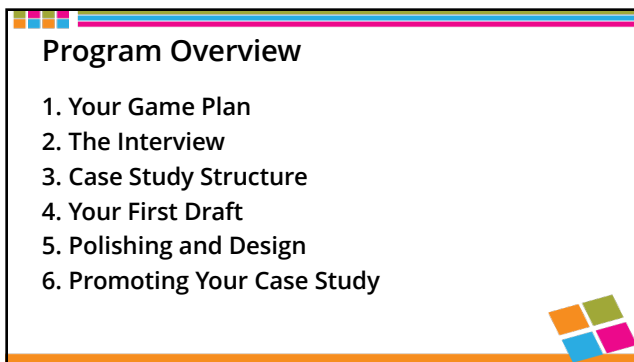
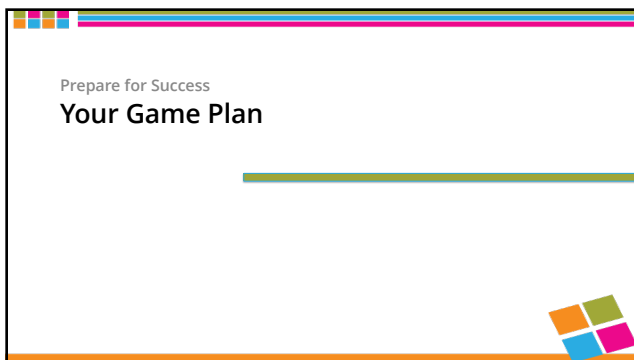




1




2




3

The Power of Storytelling




- Storytelling is central to the human experience
- Our earliest heroes live on in story



4


Shared Experience via Story



- Uri Hasson
Associate Professor of Psychology and the Princeton Neuroscience Institute
- Compared brain activity during storytelling
 - English vs Russian language
 - Storyteller vs listeners
- Found brain activity in listeners mirrors brain activity in the storyteller

Photo credit pni.princeton.edu


Sources: [Uri Hasson Faculty Page](#)
[Psychology Today](#), "Why Sharing Stories Brings People Together"



5

What You Need to Plan

- Which customer should you choose?
- What sales messages and benefits will you highlight in this story?
- How will you use the case study?
- How can you repurpose the content for related promotions?
- Who will be responsible for each task?



6




Every Story Starts with a Hero

- The ideal customer to profile
 - Identifies with your brand
 - Knows your products and services well
 - Is *actually* having success
- Works at a marquee company
- Works in one of your highest priority target industries and functional roles




7




Why Your Customer is the Hero

- Good karma
- Better reader engagement
- Easier approvals
- Help raise customers' personal profiles
- Vendor focused case studies are BORING




8



Key Messages to Highlight


- Where does the case study fall within your marketing message map?
- What are the most important brand essence values and product features for prospects that are like this customer?



9

How will you use the story?


- **Formats needed**
 - Audio, video, text, photos, PowerPoint, etc.
- **Specialized information needed?**
 - Specs, statistics, jargon, diagrams?



10

Task Checklist

• Identify customer	• Write first draft
• Create message strategy	• Write second draft
• Invite customer	• Create design layout
• Schedule interviews	• Get internal approvals
• Set up interview logistics	• Get customer approval
• Transcribe interview audio and compile notes	• Plan and implement promotions



11

Capture the Right Raw Material


Preparing for the Interview



12

Getting Customers on Board


- **Make it easy to say yes**
 - Named vs. anonymous
 - Internal vs. public
 - Center around an event
 - Make sharable for customer
 - Start with aggregate data
- **Involve your sales team**
 - Tie discounts to case studies and reference program participation



13

Pre-interview research

- Interviewee's background
- What the customer bought
- Customer's company and their customers
- Customer's industry
- Compare interviewee's peers from similar companies to get a feel for objectives
- Review other case studies from similar customers




14

Capture the Right Raw Material


The Interview




15

 **Prepare your questions**


1. Name
2. Title
3. Email Address
4. Phone number
5. What was going on in your organization that led you to begin looking for a ____ solution?
6. What other ____ solutions did you consider?




16

 **Prepare your questions**


7. As you considered other solutions, what did you like best about our company?
8. What solutions did our company provide for your organization?
9. What can you tell us about the results of this project/service?
10. How critical is the performance of this solution to your business?



17

 **Prepare your questions**

11. What can you tell us about the implementation of this solution?
12. What can you say about the customer service you received from our company?
13. What can you say about the cost of our solution?
14. How could we make our solution better for you and your team?



18


Prepare your questions

15. For your peers who aren't familiar with our company, what would you like them to know about us?

16. For someone who might say (common objection), what would you say to them?

17. Is there anything else you'd like to share?


18. Is there anyone else I should speak to?



19

Optimizing Your Interview


- Try to put your guest at ease
- Save sensitive or personal questions for the middle or end of the interview
- Use silence strategically
- Record the audio if possible



20

Your Customer is the Hero


Optimal Case Study Structure



21

Ideal Document Specs


- 1-2 pages
- 600-1200 words
- Captioned illustrations, graphs, and photos
- Executive summary
- Bullet data points
- Pull quotes
- Keyword rich copy



22

Structuring the Content


- 1. Introduction**
First introduce the customer, explains his/her role and describes the organization.
- 2. Problem Explanation**
Explain the problem the individual, department, or company faced. Whenever possible this problem should explanation should include the situation's negative impact on revenue, costs, or efficiency.
- 3. Solutions Search**
What prompted the customer to take action?
How and why did they select your solution?
What solutions did they consider?



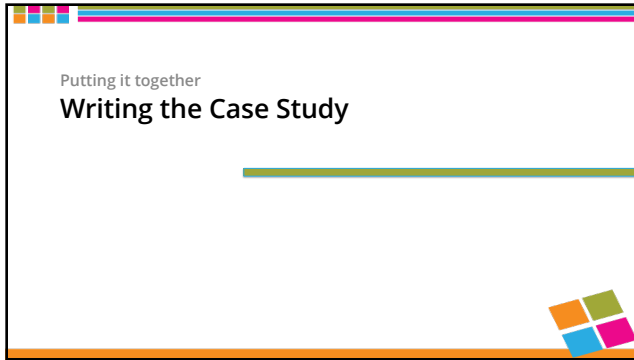
23

Mapping the Content

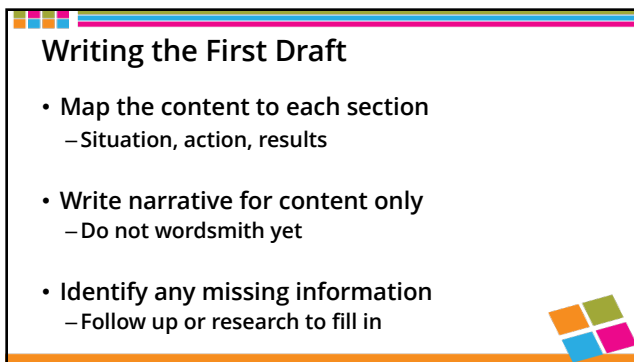
- 4. Action**
What actions did the customer and your company take to solve the problem? What did you try? What finally worked? How did it solve the problem?
- 5. Results**
What actions did the customer and your company take to solve the problem? What



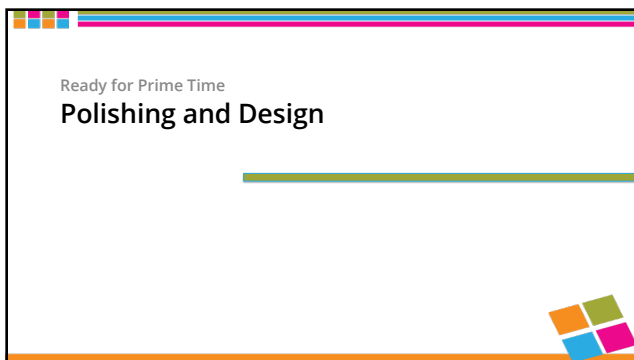
24



25




26



27

Writing the Second Draft


- Ideally, write this after first draft content has been confirmed and corrected
- Revise and polish prose
 - Check grammar and spelling
 - Use consistent verb tense and mood
 - Eliminate passive voice unless used for a reason
 - Don't forget keywords and search phrases



28

Honesty Above All


- It's OK to acknowledge issues and challenges in the customer's journey
- Sometimes the problem you resolve for a customer is a prospect's greatest fear – it's reassuring to show them you can deal



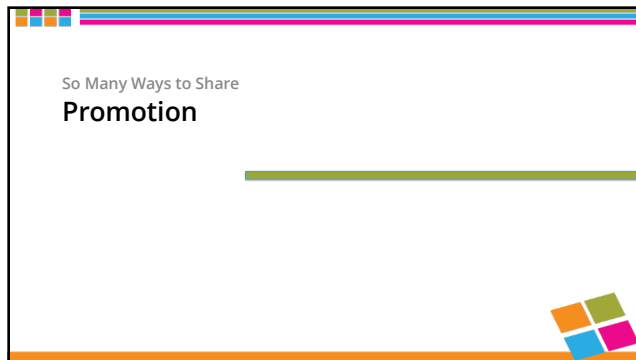
29

Now Add Some 'Oomph'

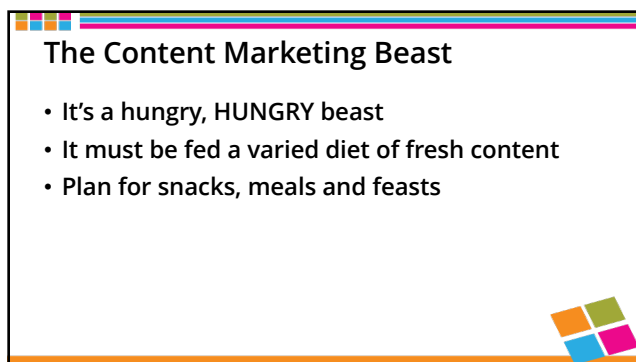
- Use clean, simple design
- Sidebar content
- Pull quotes
- Graphs and illustrations
- Photos
- Captions



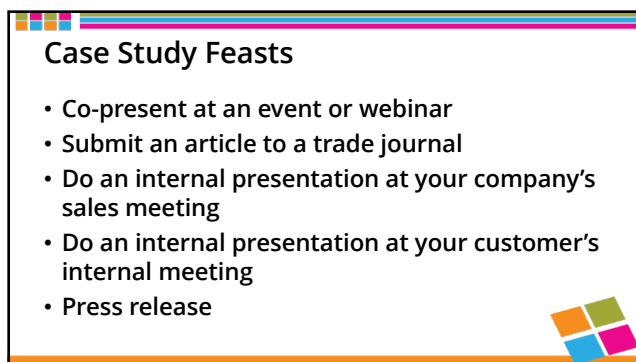
30




31



32




33




Case Study Meals

- Publish a web version on your website
- Offer a PDF download on your website
- Offer PDF click bait in marketing emails
- Offer PDF click bait in sales emails
- Offer as click bait in online ads
- Share printouts at trade show events




34



Case Study Snacks

- Add quotes to your website sidebar
- Add quotes to other marketing material
- Create a “what customers are saying” video
- Publish a collection of quotes from case studies as a testimonial page
- Use marketing automation software to personalize your available case studies to the individual viewer



35



Contact

- Katherine Chalmers
@kathchalmers
katherine@velocitymarketing.com
571.295.7990



36
