



How to Write an Epic Customer Case Study

By Katherine Chalmers

Storytelling is central to the human experience. Our earliest written narratives tell the stories of great heroes and their brave deeds: Gilgamesh, Achilles, Hector, Akhenaten, Darius, Pericles. Thousands of years later, their stories live on. Great stories inspire us and teach us in ways simple exposition cannot.

So what do ancient texts have to do with modern marketing? Why is storytelling so powerful? A well-crafted customer story can elicit a shared experience between your customers and your prospects. Persuasion, empathy, social proof, vicarious adventure.

Shared experiences, seriously? In an experiment studying the power of stories, neuroscientist Uri Hasson from Princeton measured the brain activity of a woman telling a story in both English and Russian and a group of listeners. His team found that when listeners heard the story in English and understood the narrative, their brain activity

mirrored the storyteller's brain activity at specific points in the narrative. "By simply telling a story, the woman could plant ideas, thoughts and emotions into the listeners' brains," explained [Dr. Joshua Gowan of Psychology Today](#).

Humans are hard-wired to share information via stories. Here's how you can leverage the power of stories to show prospects the true value of your products in ways that simply yammering on about features and benefits can never accomplish.

Every Epic Customer Case Study Starts with a Hero

Selecting the right case study subject isn't hard. Look for a customer who really identifies with your brand, knows your products and services pretty well, and is having success with them. You can ask your sales and customer service teams for recommendations or send out an email to your customer list asking for volunteers.

Why would your customer want to participate? When you make your customers the heroes in your case studies, being featured in a case study becomes a great way for them to increase their personal and corporate visibility. Every time one of your prospects reads the case study, they will learn about the company and the featured executive. Participating in a great case study can lead to other professional opportunities: presenting at a conference, being a guest on a podcast or webinar, being interviewed in a trade publication, etc.

Interviewing the Customer

Thorough planning and preparation before you interview your customer for the case study are essential. Start by researching the company – review their website, read their latest news, etc. Search for the person you'll be interviewing in Google and on LinkedIn to get a better idea of his or her background and job objectives. Talk to your colleagues in sales and customer service for an internal perspective on the customer's sales and delivery perspective.

Don't forget to plan the logistics of the interview. Will you speak in person, via phone or an online meeting service like Go to Meeting or Skype? Make sure you have the right phone numbers and know how to use the meeting applications.

If at all possible, try to record the interview. Being able to review the conversation will help you more accurately capture quotes and details about the customer's experience. The recording lets you focus more on what the customer is saying and less on frenetic note taking.

When you prepare your questions, make sure you ask about all aspects of the customer journey so you have adequate content available for each of the five content areas outlined below. Don't forget to verify the correct names and spellings for each person, company or location mentioned.

How to Structure your Case Study

Effective customer stories have a simple narrative structure: **situation** -> **action** -> **results**. Here are the five basic sections you need

Introduction

Introduce your customer, explain his/her role and describes the organization.

The Problem

Explain the problem the individual, department, or company faced. Whenever possible this should include a description of the situation's negative impact on revenue, costs, or efficiency.

Search for a Solution

What prompted your customer to take action? How did he or she initially try to solve the problem? What other solutions did the team consider? How and why did they select your solution?

The Action

What actions did your company and the customer take to solve the problem together? How did these actions solve the problem?

The Results and Success

How is the customer's life and business better because he or she chose your company to help solve their business problems? What recommendations does he or she have for professionals facing similar problems?

Epic Case Study Structure

Hero's Introduction

The Problem

Search for a Solution

The Action

The Results & Success

Finishing Touches

Once the body of your case study is complete, you can add finishing touches to increase the readability and search engine friendliness of your story.

Review your headlines and subheadings

How can you add strategic keywords and benefit oriented language to make your copy more enticing online and to readers?

Add images and captions

[Kissmetrics reports](#) that captions are read 300% more than the actual copy itself. You can use a nice long caption to convey a key piece of information to your readers.

Add pull quotes

Highlighting part of a customer quote as a graphic element not only enhances the social proof of your story, but also adds visual interest to break up the text and enhance readability.

Add a sidebar

Bullet points in the sidebar help readers who are scanning the document grasp key messages quickly. Quick descriptions of the customer and its challenge help orient readers to the situation. Achievement highlights illustrate the value your company can deliver

Promoting your case study

Epic case studies are versatile marketing tools. Once you have the basic case study complete you can use it many ways in your marketing programs. Promote it on the blog and resource sections of your website. Add it as a sidebar offer on your site. Use it as content bait in your website pop-ups and online advertisements. Feature it in a press release. Create a PowerPoint slide with bullet point highlights for your sales reps' sales decks. Tweet it. Post it on LinkedIn. Add a link to it in the email signature of your email blasts or sales team's prospecting emails.

If your customer agrees, you can rewrite the story as a feature article for an industry publication to create a video version. Simply use excerpts of the interview audio or write a simple voiceover script and animate some PowerPoint slides to support the story. You can also highlight specific portions of the case study by adding quotes and stats as graphics on your website or in your PowerPoint presentations. Open your mind to creative possibilities and you'll find lots of ways to share each epic case study.

