

**BUILD CREDIBILITY, TRUST, AND INFLUENCE
WITH CASE STUDIES**

even when you have limited approval.

THE CASE STUDY MAKEOVER GUIDE

Insights from
10 B2B
Technology
Marketing
& Sales Experts

DEB MONFETTE

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Please reach out if you have questions about the information in this guide. I'd love to hear from you and I'll do my best to get back to you promptly.

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Steve, an extremely successful Financial Advisor, asked, “Do you know of someone who’s got a cabin cruiser, 42 feet or bigger, and who docks it at a marina on Long Island Sound?”

What was Steve referring to? He was referring to two characteristics of his best customers. No, he didn’t ask, “Do you know of someone who needs a financial advisor?”

Today most business people get lost in their lists. However, these lists are people with real desires, needs, and lifestyles... Bill’s company works with service professionals, like Steve, who need to sell a relationship before they sell anything else.

This was the lead-in for a new style of case study written for a four-year-old SaaS company that sells a referral platform. Bill’s company is one of their customers. Because of Bill’s success, his company became a channel partner.

It didn’t start out with the typical company description of the customer or the vendor. Instead, it piques your curiosity with a real-life example of how Bill helps his clients, like Steve. The case study then leads you into Bill’s pain, how he found a solution and what he did about it. This type of lead-in breaks through the “strictly business” walls and zeros in on what’s important to the customer and his customers or clients first.

Bill remarked, *“What I didn’t realize was the benefit I would actually get for my business by participating in this type of success story.”* One reader remarked, *“The story was so compelling as it was more about the challenges being solved than the software that solved them.”*

As a B2B marketer and sales expert, are you taking advantage of the value case studies can add to your business? Would you like them to stand out from the competition, be more effective, and make it easier for your successful customers to want to contribute? If you’re ready to dive in, then ...



Photo by Jesse Orrico - Unsplash

LET’S GET STARTED!

Case studies are one of the top three B2B content marketing strategies companies are using, based on a [survey](#)¹ conducted by Holger Schulze, founder of the [Technology Marketing Community](#) on LinkedIn. (See below.) Most of you are probably already using them in some way as a tool to grow your business.

This guide examines the *typical* case study that's been used for decades. The goal was to prove a company's solutions work by focusing on their products, services, and the measurable results achieved by their successful customers. Many companies today are still following this strategy.

But proving their success should only be part of the plan. As people change the way they shop around and buy, and companies transform the way they market and sell, telling an effective customer success story requires more than the *typical* goal and focus on the vendor.

There are two other components in a case study that should come first. If these two are missing, it can derail the usefulness and credibility of the case study. (You can find these in Tip # 1 and Tip # 2.)

You'll also get tips on how to be the go-to resource along the buyer's journey, ideas for changing up the format, and how to get your successful customers to be happy to contribute.

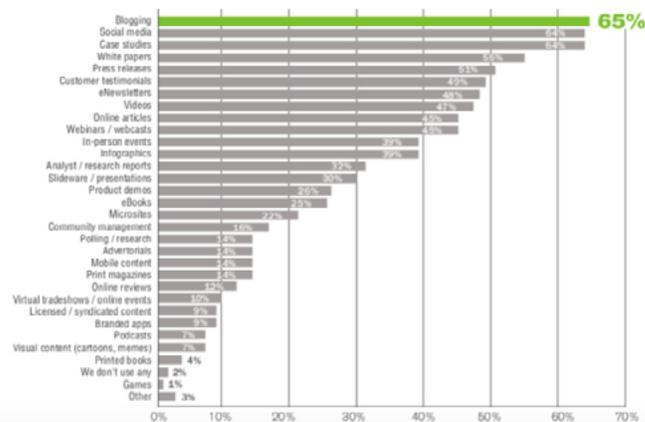
INTRO CONTINUED

YOU WILL SOON SEE HOW THE CASE STUDY CAN BE REIMAGINED TO HOOK AND ENGAGE AN AUDIENCE OF TODAY'S DIGITAL B2B BUYERS AND SATISFY THEIR NEW EXPECTATIONS.

4

MOST USED CONTENT MARKETING TACTICS

Blogging, social media and case studies are the most routinely used content marketing tactics and formats.



Source: B2B Content Marketing Report¹ - By The Technology Marketing Community on LinkedIn

In the end, you'll build more credibility, trust, and influence with both your buyers and your customers, even if you're limited in what you can tell.

WHAT CAN I DO TO MAKE MY CASE STUDIES BE MORE EFFECTIVE?

I've heard several companies ask,

"What can I do to make my case studies more effective?"

So, I shared a list of 10 questions about case studies with 240 B2B Technology Directors of Marketing, Content Marketing, and Product Marketing; Senior Managers of Customer Marketing; Sales and Account Executives; and Consultants in several niches in my LinkedIn network.

After reviewing the responses, I fleshed out the most valuable ones shared.

Next, I examined 50 case studies. From here, I selected seven of the most powerful tips to help you plan, craft, and

INTRO CONTINUED

"IF YOU DON'T HAVE ANY, OR ONLY A FEW, THAT CAN BE A VERY LARGE MARK AGAINST YOU."

"THEY CAN INSPIRE "AHA" MOMENTS WHEN THE CUSTOMER UNDERSTANDS HOW YOU CAN HELP."

publish case studies that build more credibility, trust, and influence. Use it to compare your current strategies.

Here's what a few of the experts had to say ...

"If the case study focuses on the vendor's products and services, people doubt the credibility."

"They're not effective if they're too vanilla or general."

"We're extremely limited in what we can, as marketers, say about our customers and any work we do for them."

"They're only as good as your communications strategy."

"I'm a HUGE believer of them. Works every time."

LATEST RESEARCH

Before we get into these tips, let's take a quick look at the research. You'll see why the typical case study needs to be transformed and exactly what B2B buyers are looking for.

THE LATEST RESEARCH

What are B2B buyers really looking for when deciding to purchase?

The latest [2017 Content Preferences Report](#)² by DemandGen revealed 78% of buyers use case studies more than any other resource to research purchases.

78% OF BUYERS USE CASE STUDIES MORE THAN ANY OTHER RESOURCE TO RESEARCH PURCHASES.

Which types of content have you used during the past 12 months to research B2B purchasing decisions? (Check all that apply)



Source: 2017 Content Preferences Report by DemandGen²

In addition, 48% of the respondents consider them the most valuable, followed by third-party/analyst reports (44%), and white papers (35%). Since 48% of buyers consider them the most valuable, there's definitely more room to grow and make case studies even more effective.

According to the same [DemandGen Content Preferences Report](#), B2B buyers have expectations. They're really looking to compare their efforts with more benchmarking data. They want and need to study real-world examples of their peers. People who have identified gaps, solved similar challenges, and successfully improved their business.

On top of that, 74% want content with less sales messages in their research. This leads us into ...

TWO MEGA-TRENDS

[Jill Konrath](#)³ interviewed Donal Daly, Chairman of Altify, about his new book, [Digital Sales Transformation in a Customer First World](#).⁴



They discussed two mega-trends companies must move to the top of their priority list if they want to be successful in today's digital world.

Mega-Trend #1 is Customer First

Your customers have access to a wealth of information and are armed with knowledge. They want to know what you can do for them first. Companies today have to be prepared to really deliver a benefit the customer feels will be valuable in *their* situation and to grow *their* business.

Konrath agrees that customers can see right through self-serving actions and sales messages. Unfortunately, she also sees many companies investing little time teaching their salespeople about customers and their needs.

LATEST RESEARCH CONTINUED

“WHAT PROBLEMS DOES MY CUSTOMER HAVE THAT I CAN SOLVE BETTER THAN ANYONE ELSE?”

Daly suggests that companies take the time to understand what their customers want to achieve, why they want to achieve it, what's missing or broken, and finally *feel* their pain.

He says to ask your self this one question,

“What problems does my customer have that I can solve better than anyone else?”

Mega-Trend #2 is Digital Transformation

According to Daly, we have 4.4 zettabytes of data. By 2020, that figure will increase tenfold to 44 zettabytes.

Daly explains, *“The reality is that there is not a data deficit. There's an insight deficit.”* In other words, companies need to help customers pick out the data that matters and figure out what it means.



Real-World Takeaways

To sum up the research, B2B buyers anticipate that case studies can help them get the information they need to make purchasing decisions. They expect four major things from companies.

4 B2B BUYER'S EXPECTATIONS

1. *Be Customer First.*

Decision makers want to know that you understand their pain, their situation, and what they want to achieve. They want you to deliver *benefits they find valuable for their particular needs.*

2. *Provide insights into all the data.*

Guide buyers to pick out the data *that matters to them* and help them figure out what it means.

3. *Offer more benchmarking data.*

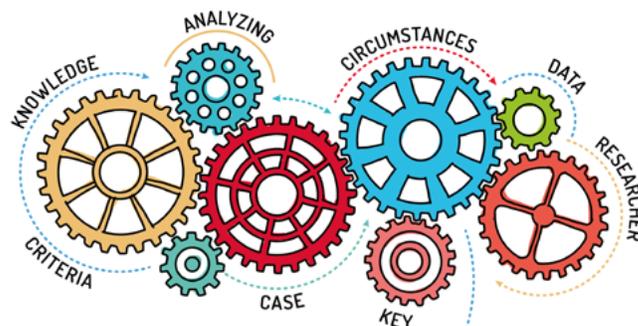
Give decision makers *the ability to study real-world examples* of how their peers identified gaps, solved similar challenges, and successfully made improvements to grow their business.

4. *Provide content with less sales messages.*

Help buyers understand their challenges. Show them the possibilities for success instead of focusing on promoting your products, your services, and your company.

LATEST RESEARCH TAKEAWAYS

BUYERS ANTICIPATE CASE STUDIES CAN HELP THEM GET THE INFORMATION THEY NEED.



Case Study

Illustration by relif/stock.adobe.com

With these four buyer expectations in mind, let's dive into:

The CASE STUDY MAKEOVER GUIDE: Build Credibility, Trust, and Influence with Case Studies (even when you have limited approval). Some companies are very limited in what they can share about their customers and how they've helped them. Others can't even use their name. In either case, many of these tips can still be applied.

THE CASE STUDY MAKEOVER GUIDE

Build Credibility, Trust, and Influence with Case Studies

(even when you have limited approval)



CASE STUDY MAKEOVER



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TIP #1 SHINE THE SPOTLIGHT ON YOUR SUCCESSFUL CUSTOMER, YOUR ADVOCATE

Proving the success of your products and services is the *typical* goal and focus of a case study. It's been used for decades. But times have changed.

One of the key strategies of a case study, often missing, is this. Shine the spotlight on your customer, their situation, their pain, and their future. Not on your company, products, and services.

Celebrate their success and make them feel appreciated in the process. Your solutions will shine as the story unfolds.

"Anyone agreeing to a case study, speaking engagement, or video interview, is already an advocate. We don't feel a need to hit the reader or viewer over the head with commercial messages. Product and service messaging are important to communicate, of course, but as a foundational element. The customer is going to work the product or service messaging in as the story unfolds."

CHAS KIELT~ Principal Product Marketing Manager, Citrix Cloud

Besides buyers want content with less sales messages while having the ability to study real-world examples of their peers. Here's what Cassandra Jowett, Director of Content Marketing at LookBookHQ had to say:

"There are three critical elements missing in most case studies today.

The first one is a person at the heart of the story. It's easy to forget that the main character, the hero of the story, is an individual person. The best case studies uncover important, but frequently overlooked, details about the person, what motivated them to succeed, and how they felt through the entire process."

TIP ONE

**OFTEN MISSING:
SHINE THE SPOTLIGHT
ON YOUR SUCCESSFUL
CUSTOMER—YOUR ADVOCATE**

“Two is the pain. Unfortunately, many marketers are afraid of including anything negative in a story about their customers. Without the problem that needed solving, the results simply fall flat. It’s not a story without the conflict.

Three is treating the new solution like an instant magic wand. ‘Then they implemented Product X, and voila! All was well.’ While you never want them to think that working with you was hard, you should educate them about the process personalized to your client.”

CASSANDRA JOWETT ~
Director of Content Marketing,
LookBookHQ

Make it real. You’ve helped your customers improve their business and even their personal lives, and many times they’re willing to contribute their thoughts, feelings, and experience working with you. Help them uncover that. Listen and let them speak in their own authentic voice about what was important to them.

In other words, your case study should...

**Sell the Journey.
Not Just the Destination.**

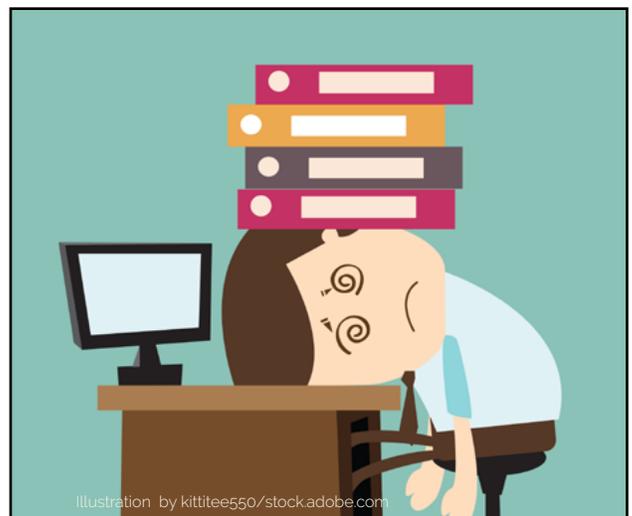
Encourage your successful customers to candidly express their knowledge,

TIP ONE CONTINUED

**OFTEN MISSING:
SHINE THE SPOTLIGHT
ON YOUR SUCCESSFUL
CUSTOMER—YOUR ADVOCATE**

experience, and advice. Let them open up and paint a complete picture of what life was like:

Before—Don’t bury the pain. Start with it. Let them explain what doubts they had, why they decided to change, and why they chose your solutions.



“The key to a successful case study and customer story is to interview the owner of the process with the challenge, the person who felt the pain.”

DEBBIE TERWILLIGER ~ Lead Product Marketing Manager, AT&T

During—Share how they integrated your products and services and explain the obstacles you stumbled on and cleared.

After—Let them describe the benefits, the outcomes, and the results in their own words. Inspire them to share thoughts about the future.

Bring credibility to the piece with a real-life story. Be sure to select the right person/people to interview. The person who felt the pain, experienced the solutions working, and who was delighted with the benefits and the outcome.

Get *before, during, and after* quotes from your happy customer. Their words are powerful and can be sprinkled throughout the case study to gain trust and make it even more credible.

Prove Business Value

Pain isn't always associated with problems. It can be reaching a goal to rapidly expand a company, reinvent a brand, or successfully launch a new product line.

TIP ONE CONTINUED

OFTEN MISSING: SHINE THE SPOTLIGHT ON YOUR SUCCESSFUL CUSTOMER—YOUR ADVOCATE

Chas Kielt, Principal Product Marketing Manager at Citrix Cloud, explains,

“Case studies aren't just about fixing problems. They can prove business value, too.

For example, enabling facility expansion, overcoming obstacles such as IT resource constraints, introducing a new line of business, and growing top of line revenue and allowing more of it to fall to the bottom line.”

Kielt shares, “the most influential stories help to achieve a lofty business goal.”

So, be sure to flesh out the pain. Was it a problem your customer was trying to fix

or an ambitious goal they wanted to achieve? In either case, by understanding and addressing their needs, you will be able to ...

Discover Your Differentiation

Every business, person, and challenge will be different. You should be able to discover something unique about each customer and what value they see in you. Many times companies stumble onto new ways to differentiate themselves with this process that no one else can copy.

TIP ONE CONTINUED

**OFTEN MISSING:
SHINE THE SPOTLIGHT
ON YOUR SUCCESSFUL
CUSTOMER—YOUR ADVOCATE**

“Many companies, technology especially, craft case studies that are feature and benefit driven with respect to product functions. End-customer strategic challenges are not addressed well, if at all. This leaves many tech firms poorly differentiated.”

TROY FULTON~ Director of Marketing, MicroNergy





In summary, **Tip#1**, often missing, is to shine the spotlight on your successful customer and not on your products and services. The customer is going to work the product or service messaging in as the story unfolds.

Buyers expect less sales messages when researching solutions. They also want clarity, a trusted resource, and to feel confident in their buying decisions. Leading with a real-life story shows you understand your customer and makes it more credible.

Below are the key insights to review.

TIP ONE CONTINUED

**OFTEN MISSING:
SHINE THE SPOTLIGHT
ON YOUR SUCCESSFUL
CUSTOMER—YOUR ADVOCATE**

SHINE THE SPOTLIGHT ON YOUR CUSTOMER

- The best case studies uncover important, but frequently overlooked, details about the person, what motivated them to succeed, and how they felt throughout the process.
- Interview the person who felt the pain and who was delighted by the outcome and let him speak in his own authentic voice.
- Don't bury the pain. Start with it. Without the problem that needed solving, the results simply fall flat.
- Educate buyers about the process your client went through instead of treating the new solution like an instant magic wand.
- Sell the journey, not just the destination. Unfold the story about what life was like *before, during, and after* the solutions.
- Get *before, during, and after* quotes from the happy customer.
- Prove business value by achieving a lofty business goal, such as expanding a company, reinventing a brand, or successfully launching a new product line instead of always focusing on a problem or a challenge.
- Uncover your differentiation.

TIP #2 CONNECT WITH YOUR PROSPECTIVE B2B CUSTOMERS

The first key strategy of a case study is to shine the spotlight on your successful B2B customer. The second crucial piece, often missing, is to make a connection with your prospective B2B customers.

“I’m a HUGE believer of case studies and have done quite a few in the past. First, we would lay the groundwork with the background on each of the industry’s needs, key business processes, and their importance. Then we’d focus on the specific issue with the customer, the high-level solution, and the results/benefits. They were very effective because they demonstrated an understanding of the industry with issues that resonated with our target audience.”

DEBBIE TERWILLIGER ~ Lead Product Marketing Manager, AT&T

Your products and services are complex, new, innovative, and/or expensive. Case studies enable you to give your buyers two things they expect.

The first is to provide insights into all the data. Guide buyers to pick out the data that matters and help them figure out what it means for their situation.

TIP TWO

OFTEN MISSING: CONNECT WITH YOUR PROSPECTIVE B2B CUSTOMERS

The second is to create more benchmarking data. Give decision makers the ability to study real-world examples of how their peers identified gaps, solved similar challenges, and successfully made improvements working with you and your solutions to grow their business.

Help them understand the benefits.

“The goal of these stories is no longer just to close a deal; they serve to celebrate the success of a customer (an individual person or team, not just a logo) and to help the audience better understand the benefits of your solution through the success of one of their peers.”

CASSANDRA JOWETT ~ Director of Content Marketing, LookBookHQ

“My biggest issue with case studies is when I, as a salesman, use them people often doubt the credibility since it’s quite obvious that I will choose companies and groups that back up my message.”

UNNAMED ~ Account Executive,
SAAS Company

If you want your case studies to be seen as credible, try changing your message. Focus on what's important to your buyers in their situation.

Don't assume you know what they need. Analyze your data. Find out what topics they search for and spend the most time on. Talk with your sales associates about questions your prospects need answers to that could be stalling their decision to buy. Bring these to the surface in your case study.

Once you show you understand a person's needs, it will be easier to connect with them and build credibility and trust.

“Case studies can give prospective customers examples of how a product that is not easy to understand or use can help solve their problems. It gives them confidence that you have the means to help. It also provides the proof that your company should be considered to solve the problem.”

DENISE BOYD ~ Global Marketing
Communications Manager,
PerkinElmer

TIP TWO CONTINUED

OFTEN MISSING: CONNECT WITH YOUR PROSPECTIVE B2B CUSTOMERS

You may not be able to answer all the questions in a case study. So, include a call to action linking to other content with more details.



Tip #2, often missing in case studies, is to connect with your prospective B2B customers. Show you understand their goals, obstacles, and challenges by identifying:

- Specific Needs in Each Industry and Market
- Key Business Processes in Order of Importance
- Customer Challenges, Desires, and Goals
- Customer Roles
- Possible Solutions
- The Benefits
- Your Solutions that Standout
- Clarity for Complex ideas

Then address some of these in your case study to build confidence and credibility.

TIP THREE

BE THE GO-TO RESOURCE ALONG THE BUYER'S JOURNEY

TIP #3 BE THE GO-TO RESOURCE ALONG THE BUYER'S JOURNEY

A case study should not stand alone. Instead, be the go-to resource for information along the buyer's journey with bundled content. This means different types of content linked together that are relevant to the case study. It makes it easy for you to guide buyers to the next piece of content.

“Case studies can't operate in isolation. They are only as good as the content communication strategy across inbound and outbound channels and alignment through the buyer's journey.”

TROY FULTON ~
Director of Marketing, MicroNergy

The second mega-trend Daly discussed in his new book, [Digital Sales Transformation in a Customer First World](#),⁴ is Digital Transformation. It fills up our world each year with more data, but with less insight into the data.

With the right bundled content, you can guide people to choose the data “that matters”, help them understand what it means, and dive deeper to get their questions answered. You can help influence their research, their journey, and their decisions.

Create a Binge-Worthy Content Experience

B2B buyers are strapped for time and littered with distractions. But when they're in buying mode, they're focused. They zero in on more detailed content and in different flavors. For instance, a third party research report on a specific business challenge, a white paper that goes into more technical details, a blog post where they can scan and compare solutions, or a webinar to catch major points and ask questions.

They also want their search to be easy. Here's a link to a brief article on [Content Bingeing In A B2B World](#),⁵ by Kathy Baughman, President of ComBlu. With bundled content, you can help your B2B buyers easily binge-research as they look for information about their issues.

Why not create a resource section with all of your content and link your case

TIP THREE CONTINUED

BE THE GO-TO RESOURCE ALONG THE BUYER'S JOURNEY

studies to other related whitepapers, reports, tips, webinars, and of course other case studies. Make it easy for your buyers to dive into plenty of your content when *they* need it.

Give People Options

Besides linking your case study to other related content for binge researching, take the PDF and repurpose it. Pull out bits of your success story and create other types of content to reach people in different ways along the buyer's journey.

Repackage your case study into "snackable" digital versions as an overview or an executive summary, blog posts, and List and How to articles on [LinkedIn Publisher](#).⁶ Design an infographic with key points from the case study. Combine the results of several case studies into an eBook.

But whatever you decide to do...

Make It Engaging

Start with a story about your customer and his pain. Create benefit-driven subtitles. Add design elements to draw attention to important details. Use charts and graphs for things like measured results. Include an on-site company photo of daily activities to add the human touch.

Create different types of content that enable a person to read, watch, listen, visualize, touch, and interact with. Some examples are slide presentations, an interactive infographic, or a digital brochure. Create a video testimonial, a podcast interview case study, or a webinar.

Include an interactive tool such as a worksheet, an assessment, or a knowledge quiz at the end of the case study.

Don't Forget the Touch

Print an infographic or a digital brochure to hand out to your audience at trade shows. Pass along your printed case study to prospective customers at sales meetings. Create a booklet of case studies to give away at conferences.

Brainstorm creative ways to craft, share, and repackage your content.

Whatever content you decide to create, dedicate a visible section on your site for all case studies. Add easy access to the other relevant content, just a click away, so busy people can binge-research.

Using Case Studies

Here's where the experts on LinkedIn are putting their case studies to good use:



Repackaging Case Studies

Here's how some of the LinkedIn experts are repackaging case studies:



TIP THREE CONTINUED

BE THE GO-TO RESOURCE ALONG THE BUYER'S JOURNEY

Manage Your Content Experience

“Most of our feedback on the effectiveness of our case studies and supporting content was from our sales team, so it was basically people’s opinions not a measurable fact. It’s ideal to have a delivery tool that provides a trackable experience to measure basics like open rates and engagement with the content.”

LUIS QUIROGA ~ VP of Product Strategy & Marketing, Agero, Inc.

You can manage the content yourself. But to make it easier and more efficient, find a content marketing or content engagement platform to use with intelligent automation. These tools can help create self-nurturing, personalized content experiences for your buyers as they binge-research. This can save you loads of time, create better experiences for your buyers, help you get more qualified leads, and better results. In fact,

you can accelerate the entire process throughout the customer life cycle and sales enablement.

Talk with Your Sales Teams

In addition to intelligent automation, talk with your sales teams. They have stories to tell. They can share gaps buyers are experiencing and questions they need answers to that are holding them back.

Your sales people can give advice on what content is missing for specific buyers. These are the types of things that can be identified and answered in your case studies to add even more value.

Build “Trusted Advisors”

Take it a step further with your go-to resources and help your sales teams become “trusted advisors”.

“I’ve mostly used case studies in sales training. They’re effective when devising a strategy because you have facts to leverage in the training with your sales team.”

UNNAMED ~ Strategic Marketing Manager & Producer



Tip #3 suggests to be the go-to resource along the buyer's journey by creating a binge-worthy content experience. Give people options. Make it engaging and repackage your case studies into snackable digital content. Manage your content experience. Talk to your sales teams, and help them become “Trusted Advisors”.

TIP #4 CREATE MORE, BE RELEVANT, AND GET ORGANIZED

If you want to be a go-to resource for your buyers, both quality and quantity count. How many case studies do you have? Of these, can buyers easily find them, especially ones they can relate to and that tap into their needs?

Remember, 78% of buyers use case studies more than any other resource to research purchases.

Case Studies = Business Value

Create More

Case Studies are one of the most valuable pieces of content you can invest in. Don't just have a few. Create a resource of successes and capture your buyer's attention. Give them confidence in overcoming their obstacles and show them how you've helped other companies be successful. You can use them in a dozen different ways (See Tip #3) while building credibility and trust for your organization.

"If you don't have ANY or only a few, that can be a very large mark against you."

MIKOLKA MORRILL ~ Account Executive, Northeast Region, Prezi

TIP FOUR

CREATE MORE, BE RELEVANT, AND GET ORGANIZED

The goal should be to have a number of case studies that showcase key messages and exude business value. They can be focused on a certain target audience, specific challenges, new solutions, business roles, industries, or verticals. Have a plan to create new studies each year. You can also update current ones every six to 12 months to see further progress and to continue to build the relationship with your successful customer.

People need to see things more than once to persuade them to change. Share your case studies in places other than your website and repackage them into other formats.

Be Relevant and Get Organized

After you plan to create several case studies, how will you organize them and be relevant to your buyer's search?

If you *already have* a number of case studies, how are they organized? If they're not, it's time to reorganize them.

In any case, be relevant and find out what makes the most sense to your specific buyers during their research and decision making process.

“Having a portfolio of case studies that crossed verticals with horizontal applications was helpful for everyone, especially training our sales people. We sought to move the sales teams from purveyors of commodities to “trusted advisors”.

DEBBIE TERWILLIGER ~ Lead Product Marketing Manager, AT&T

TIP FOUR CONTINUED

**CREATE MORE, BE RELEVANT,
AND GET ORGANIZED**

The latest studies in the [Content Preferences Report](#)² by DemandGen show how buyers prefer to search for case studies.

TOP 3 WAYS BUYERS PREFER TO SEARCH FOR CASE STUDIES

67% prefer content organized by business role

64% prefer content organized by industry

49% prefer content organized by specific verticals

Case studies are not always easy to find on a website, yet personalized to a buyer's needs. Which tab are they in? The Why [Company X], Resources, Products, Verticals ...

Whichever way you choose to organize them, don't force people to dig. Good chance you'll lose them—possibly to a competitor's site that has an easy-to-find resource.

 To sum it up, case studies are one of the most valuable pieces of content you can invest in. [Tip #4](#) suggests to create more, be relevant, and get organized.

First, don't just have a few. Now is your chance to shine the spotlight on your successful customers and show how you've helped other companies overcome their obstacles and their goals. Then make your case studies and customer stories easy to spot and relevant to your buyer's business roles, industry, or specific verticals.

TIP FOUR CONTINUED

CREATE MORE, BE RELEVANT, AND GET ORGANIZED



Illustration by sergeyvasutin/stockadobe.com

TIP FIVE

ONE FORMAT DOES NOT FIT ALL CASES

TIP #5 ONE FORMAT DOES NOT FIT ALL CASES

During my research, I realized that newer companies, five years or younger, are using the terms *case study* and *customer success story* interchangeably for the same piece of content. Others are calling case studies *the longer-form PDF* and repurposing them into customer success stories for blog posts and articles for third-party publications.

Is there a real difference between a case study and a customer success story and if so, what is it? Both can help companies in three ways. One is to help people find gaps, overcome challenges, and improve their business. Two is to help buyers make more confident purchasing decisions. Three is to prove a vendor's solutions work.

Historically there has been a difference. Companies differentiate between a

case study and a customer success story based on the audience and the objective.

But today, companies are starting to merge the two. They're transforming the typical case study by focusing on *the experiences of the successful customer* and *needs of the buyer*. Their products and services shine because of it.

First, let's look at the case study flavors along with their differences.

A Typical Customer Success Story

Historically a success story humanizes the brand by focusing on the customer. Through the words of your customer, it shows that you care about them and understand their business. The story can connect with a wider, but still targeted, audience and capture their attention.

It describes the customer's complete experience. The story is an overview that unwinds challenges the customer had, why they chose your specific company, their experiences during and after implementing the solutions, and the benefits and results they've received. Subheads communicate the benefits and guide the reader through the business story.

They're written to pique interest in people having similar issues. It also gives busy C-Suite Executives just enough information to address their challenges, shine a light on the value, and show why they're a good investment.

TIP FIVE CONTINUED

ONE FORMAT DOES NOT FIT ALL CASES

Think of the typical customer success story as examining *the why*. Why was this customer so successful?

“Experience/Story-based format works well for blog posts or newsletters, especially when the person telling the story is a subject matter expert. It’s great for thought leadership, engagement, brand building, and for humanizing the company. ”

DENISE BOYD ~ Global Marketing Communications Manager, PerkinElmer

A Typical Case Study

People who want to deep dive into the details would seek out a case study. They want to know how your process worked, how easy it was to implement, why you’re different, what it was like working with your company, and what were the measurable results.

A case study is typically written for technical managers and decision makers. These are the people who will be working directly with your solutions and need to know *“the how”* details.

Most case studies included the (CSR) Challenge Solution Results format. The goal was to prove *how* a company’s products and services worked and were a good investment. Most of them were focused on the vendor and the measurable results achieved by the customer.

Let’s dig into the CRS format.

Challenge, Solution, Results (CSR) Format

CSR format gets to the point, is easy to follow, and is focused on proving measurable success of a company’s products and services. It’s been used for years.

A few of the experts shared ...

“The basic CSR format is a good conversation starter for sales.”

“The CSR format is easy to follow and use for presentations..”

“It’s a quick analysis of the challenge and business value.”

TIP FIVE CONTINUED

ONE FORMAT DOES NOT FIT ALL CASES

“Since we compete with an essentially free product, proving that sales and marketing teams benefit from our solutions with a specific ROI can help someone to understand the value we provide. Some prefer hard data and ROI instead of simply the “emotional” sell.”

John D. ~ Sales Executive, B2B SAAS Company ~ Clients include 80% of Fortune 500 Companies

“The challenges, solutions, and results format for case studies works best where the reader wants to get directly to the point, and may be further along in the buying cycle. They have a strong interest and need reinforcement. It’s also great for senior management when you can talk bottom line numbers, saving money, and increasing productivity.”

DENISE BOYD ~ Global Marketing Communications Manager, PerkinElmer

THE CSR CASE STUDY WORKS BEST FOR

- Buyers who want to get to the point.
- Sales-ready prospects who know what they want and are further along in the buying cycle. They just need reinforcement that they’re making the right decision.
- Buyers who need evidence that speaks to doubt, minimizes risk, and builds trust.
- Senior Management who wants to talk bottom line numbers, business value, and productivity.
- Providing concrete evidence and validation from other companies in their niche who successfully used the solution.

TIP FIVE CONTINUED

ONE FORMAT DOES NOT FIT ALL CASES

The CSR format is also extremely useful for companies who have limited approvals from their customers. Some companies don't want to share the details of their secret solutions to the outside world for competitive reasons. Others are bound by legal agreements, such as NDAs, that limit what they can say. Still others have strict guidelines around brand representation or just don't want their name to be revealed.

“It was not easy to get customers to contribute. Businesses do not want to reveal their solutions to the outside world. However, if we agree to not attribute, they are often willing to contribute.”

TROY FULTON ~ Director of Marketing,
MicroNergy

In some industries like finance, higher education, and pharmaceuticals it's

extremely difficult getting the buy-in on case studies. This is where a company may focus on how their products or services solved a challenge.

“We follow the challenge, solution, results format mostly out of necessity. Nearly all of our clients are under NDA and we are extremely limited in what we can, as marketers, say about our customers and any work we do for them. We end up talking about ourselves by default—yet we still do what we can to make sure that profile is one our customer is proud of.”

STEPHANIE VAN NESS ~ Marketing
Communications Manager & Chief
Storyteller, ViewPoint Interactive
Solutions

Tell Me More!

Unfortunately, many CSR case studies are very bland. They're all about the sales message. They lack an understanding of the customer's needs and simply don't have the credibility that prospective customers look for.

The CSR was part of the structure, but we really pushed for making these interesting with a good narrative.”

LUIS QUIROGA ~ VP of Product
Strategy & Marketing, Agero

TIP FIVE CONTINUED

ONE FORMAT DOES NOT FIT ALL CASES

Here's what a few of the experts had to say ...

"People question the credibility of a CSR case study because they think it's patting the vendor on the back, is biased, and is littered with sales messages."

"It's not enough when the prospect says, 'Tell me more!'"

"It doesn't pull me in when it's all about the vendor's products and services."

"Most are feature driven and they don't address the real challenge the customer had."

Chas Kielt shared his experience with the CSR format.

"Both have their place. CSR can be a conversation starter for sales, but the desired response is 'Tell me more.' That's where real-world use-cases come in to elaborate, illustrate, and validate product claims.

The CSR approach is classic ... formulaic. Many of us in marketing learned and mimicked the style in pitch decks, marketing plans, and presentations. But the narrative sequence is dated, in my view. CSR is limited and lacks nuance and color."

CHAS KIELT ~ Principal Product Marketing Manager, Citrix Cloud



Photo by DenisZaporozhtsev/stock.adobe.com

Several of these experts agree it's time to change up the format.

Four Case Study Flavors



Photo by Viktor Hanacek - picjumbo

Here are four suggestions to make your case studies more engaging, exude value for different audiences, and repackage your efforts.

1 One-Page Overview CSR Case Study

Create an executive summary as a one-page overview with the CSR format. Include a link back to a detailed success story as a call to action for buyers who are binge researching.

A one-page overview works well to introduce people to your proven solutions and results. It's easy to print and hand out to prospects at sales meetings, trade shows, and conferences, and to display on your website. The call to action enables potential customers to get more information from you.

2 Customer Experience Triangle Case Study

This is a great way to connect with your prospective B2B customers. You can link these three content pieces together based on the buying stage.

A. Customer Experience Success Story

First, craft a Customer Experience Success Story. Show that you understand your customers, how you can solve their problems, and provide insights into the data and results. Alter the format by

adding the story element to capture the experience the customer had throughout the process.

For example, start with the story of your customer drawing you into his world. Tap into the *possibilities* for change. Then, let your customer expose his *pain*, what made him decide to change, and why he chose you. Next, dive into *why* your solutions were a success. Last, capture his *advice* and any *thoughts on the future*.

B. Technical Case Study/Use-Case

Create a separate in-depth case study, or use-case, focused on the *how*—the technical process and implementation of how your solutions helped your customer succeed. It would only be shared with serious buyers ready to make a decision. This is especially useful when you want to avoid competitive conflict.

C. One-Page Overview CSR Case Study

Create a one-page overview or executive summary with the CSR format. This works well to introduce people to your proven solutions. As a call to action, guide them to the Experience Success Story. Next, if they're serious buyers, share the Technical Case Study.

Four Case Study Flavors



Photo by Viktor Hanacek - picjumbo

Four suggestions continued:

3 Benefits Case Study

Instead of highlighting the CSR, use it more for guiding the process. Keep the focus on the customer, tell the story, and emphasize the benefits. Create subheads of the story path along with the benefits throughout the case study.

People are first concerned that you understand them, their business, their situation, and their needs in their specific roles. They want to know how you can help them find gaps and jump over obstacles. They're also curious to understand what it's like working with you.

So, give them the benefits.

4 Interview Case Study

Briefly introduce the customer, their goals, and the solutions they chose in a one-page introduction. Then, add in important questions asked during the interview followed by the customer's answers. Last, highlight the results.

The interview format is often used in a video case study. It can also be repurposed into an engaging article.

"In my past experience, case studies were extremely useful for the sales team, when the focus was on benefits to the customers. Works every time."

JUSTYNA BEDNARSKI ~
Digital Marketing Manager,
Carlisle Interconnect Technologies

 **In Tip #5** you learned to make your case studies more engaging by changing up the format for different audiences and repackaging your story. Plan ahead and decide where along the buyer's journey you wish to share and introduce your case studies.

Then plug into the four case study flavors and develop your plan. The four flavors are the One-Page Overview CSR Case Study, Customer Experience Triangle Case Study, Benefits Case Study, and the Interview Case Study. Each one gives you ideas and strategies to make your case studies more effective.

TIP #6 MAKE IT EASY FOR YOUR ADVOCATES TO SAY YES!

Make it easy for your successful customers, your advocates, to say yes.

3 THINGS TO CONSIDER

1. Don't ask them to be featured as a favor to you.

Instead use it as an opportunity to show appreciation for their business and for their success.

2. Present it as a value exchange.

Explain that you're creating content they can use to market their business as a thought leader and expert in their field. On top of that, reward them for their contributions. Offer to feature them at a users group summit. Invite them to speak at a conference or in a webinar. Ask them to create an article for your newsletter or a post for your blog. Give them exposure.

3. Respect their time and input.

Be sure to explain the process, the time commitment, the ability to edit and approve the final piece, and where it will be published.

TIP SIX

MAKE IT EASY FOR YOUR ADVOCATES TO SAY YES !

Some Marketers Suggested ...

"Offer a platform to highlight their business by speaking at an industry event."

"Provide an outline of the entire process and what's expected."

"Explain the time involvement for the interview, review and approval, and edit process."

"Give reluctant customers the ability to approve where the case study is published by providing a checklist."

“We typically tie in additional services from us (extra templates, training, and support) in exchange for a case study. It really works well for us since we want them to be successful, and they’re happy because they receive additional help from us.”

MIKOLKA MORRILL ~ Account Executive, Northeast Region, Prezi

“First, I introduce the idea of building industry and thought leadership for themselves and for their organization. Next, I explain what’s expected of them, including time. I let them know they’ll have a chance to review and make changes before publication. I also give them a discussion guide which includes starter questions and bullet points they can consider working into their responses. It’s not scripting. It simply prepares them for the interview, and it alleviates the deer in the headlights reaction by staring at a blank page.”

CHAS KIELT ~ Principal Product Marketing Manager, Citrix Cloud

TIP SIX CONTINUED

MAKE IT EASY FOR YOUR ADVOCATES TO SAY YES !

“I think you have to pick the right client who is willing to work with you, and who is a strong advocate for your product or service. To make it easy for the customer to say yes, my team did all of the legwork with minimal support from the client.”

LUIS QUIROGA ~ VP of Product Strategy & Marketing, Agero



In Tip #6 you learned how to make it easier for your successful customers to want to contribute to your case studies. Don't present it as a favor to you, but as a value exchange for them. Make them comfortable with the process and explain the time commitment, the ability to edit and approve the final piece, and where it will be published. Hear their concerns and come up with creative solutions that inspire them to say yes!

TIP SEVEN

GIVE CUSTOMER LOVE

TIP #7 GIVE CUSTOMER LOVE

We started off with Tip #1 by *shining* the spotlight on the customer. In Tip #7, we're going to end by *keeping* the spotlight on the customer. Thank them for their time, their contributions, and their success. Give them something they value to show your appreciation and to strengthen the relationship.

Here's what Lauren Triance-Haldane, Senior Manager, LookBookHQ had to say:

"This is the fun part. We try to make sure thank you gifts are unique to the customer who shared their story with us. This could mean anything from helping build up a sock lover's crazy collection, to satisfying a team's insatiable Krispy Kreme craving during the 3pm crash.

It's amazing what tidbits you can pick up in conversation with your customers if you listen and remember the little things they say. We also find that in today's

email-centric age, personalized touches like handwritten cards or custom videos go a long way to celebrate success and milestones."

LAUREN TRIANCE-HALDANE ~ Senior Manager Customer Marketing and Advocacy, LookBookHQ

"We tried to fulfill our customer's desire for exposure. So we positioned our cases studies as examples of best practices in action. We wanted the customer to feel like a leader in their category."

LUIS QUIROGA ~ VP of Product Strategy & Marketing, Agero

CUSTOMER LOVE IDEAS

- Always mail a hand-written card.
- Send something personal that they value and/or will enjoy.
- Invite them to an event and pick up the tab.
- Tie in additional services such as extra training or support in exchange for a case study.
- Gift them a business book that shares valuable insights.
- Create a special advocate or loyalty program to reward your successful customers.
- Take them out to dinner or lunch.



Tip #7 guides you to always surprise and delight your successful customers, your advocates, for their contributions. Give them something they value to show your appreciation for their efforts.

CONCLUSION

As a B2B marketer and sales expert, are you taking advantage of the value case studies can add to your business? Research shows 78% of B2B buyers use case studies more than any other resource to research purchases. This guide examines how the typical case study can be reimagined to hook and engage an audience of today's digital B2B buyers. In the end, you'll build more credibility, trust, and influence even if you're limited in what you can tell.

These 7 Tips were a compilation of feedback I gathered from marketing and sales technology professionals on LinkedIn along with my own research and experience.

THE CASE STUDY MAKEOVER GUIDE: Build Credibility, Trust, and Influence with Case Studies (even when you have limited approval).



CASE STUDY MAKEOVER



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Use this as your go-to-guide. Compare these real-world tips with your current case study strategy. Decide where your gaps are and take action to give buyers what they need. Make them more useful for your customer advocates and your company.

Some companies are very limited in what they can share about their customers and how they've helped them. Others can't even use their name. In either case, many of these tips can still be applied.

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List of Resources

- 1 [B2B Content Marketing Report](#) by Technology Marketing Community on LinkedIn, Holger Schulze, Founder.
- 2 [2017 Content Preferences Survey Report](#) by DemandGen.
- 3 Jill Konrath, B2B sales strategist, speaker and the author of the sales books *Selling to Big Companies* and *SNAP Selling*; [Interview with Donal Daly](#).
- 4 Donal Daly, Chairman of Altify, Author of [Digital Sales Transformation in a Customer First World](#).
- 5 [Content Bingeing In A B2B World](#), by Kathy Baughman, President of ComBlu.
- 6 [LinkedIn Publisher](#)

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**If you've found these makeover tips useful
please share the love :)
Thank You!**



"We can't solve problems by using the same kind of thinking we used when we created them."

~ ALBERT EINSTEIN



Connect with me on Social Media



DEB MONFETTE
B2B Content Writer & Strategist | Business Ghostwriter

As I glanced up at the Art Director of Playtex Products, Inc., he grinned. He had to drastically shorten the redesign time of the entire line of Jhirmack hair care products. Yes, he was impressed with my demo but VERY skeptical we could execute hard, fast, and with impact. After all, this was one of the first 3D design access studios in the country with a new, disruptive process. I realized from this day forward that it wasn't just about the numbers.

Today, I'm a content writer, strategist, and business ghostwriter at a company I founded called Contenttriggers LLC. I specialize in B2B technology and work with business executives, marketers, product managers, and even owners. I help them find creative, customer-focused ways to communicate their ideas, vision, culture, and solutions to effectively tell their stories and solve problems.

For over 20 years, I've worked for technology companies in marketing, sales, product development, quality assurance, training, customer service, and consulting. I've rolled up my sleeves with four startups and dozens of new and disruptive products and services. I've learned that the experiences you provide can knock down barriers and open doors for your audience to connect with you and your customers to become advocates for you. It can be your differentiation that no one else can copy.

I'm a writer with a love for good design and storytelling. You can read more of my articles on [LinkedIn](https://www.linkedin.com/in/dmonfette/). <https://www.linkedin.com/in/dmonfette/>

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