



**Uncover a 3+1 Formula to Inject  
“Action Power”  
into Your Case Studies**

By Deb Monfette | [Contenttriggers.com](https://Contenttriggers.com)

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**Would you like to create case studies that hook your buyers into taking action and excite your successful customers into participating?**

Then, let's not waste another second and uncover this formula.

The [Avengers](#)<sup>1</sup> are the Earth's Mightiest Heroes. There are dozens of them. Each one has unique powers. So they join forces to tackle threats too big for one hero alone. In other words, together they create “action power.”

Companies use case studies to prove that their products and services can do the job and help nudge their buyer to make a decision. They highlight one giant force.

The ROI.

However, the return on investment for a company is just one hero in the sales mix. Case studies can be much more powerful if you join the numbers with other forces, just like the Avengers. These forces, in combination, can create an undeniable connection with your audience and enable you to grow your relationship with your successful customer.

They also create an undeniable competitive advantage for you. In fact, a [Gartner survey](#)<sup>2</sup> revealed that 89% of marketers expect that their company can stand out by creating unique customer experiences across digital channels that build lasting relationships. Introducing the 3+1 Formula into your case studies can do just that.

Would you inject your case studies with “action power” to create a unique customer experience, if you could?

First, let's see just how impactful case studies really are.

## Studies Show ...

Studies show that case studies are the third most effective B2B marketing tool behind webinars and in-person events. Here's a link to the [B2B Content Marketing Benchmarks, Budgets, and Trends Report—North America](#),<sup>3</sup> by [Content Marketing Institute](#)<sup>4</sup> and [MarketingProfs](#).<sup>5</sup>



This means that a case study can move people to pay attention to your solutions and *take action* to buy your products and services faster than almost any other type of content, if crafted effectively.

A case study is proof of success that you and your customer should be proud of. Your customer should be happy to contribute,

and your buyer engaged to check it out and make a decision in your favor.

Now I said should ...

## The Data, The Numbers ... Isn't that enough?

Saved \$130,000 over traditional media costs in 3 months; generated \$6.5M in revenue; increased sales-ready leads by 420%; increased attendance from 16% to over 52% ... These are powerful results you'd expect to see in a case study.

After seeing results like these you anticipate potential customers will make the move to buy your products and services. You may also hope that your happy customers will jump right in to be case study candidates, as a favor to you.

But that's not always the case, right?

Case studies focused on results, even though impressive, are missing critical components needed to capture a buyer's attention, acknowledge their desires, and eliminate their roadblocks. They open up possibilities.

These are all things that speed up the decision to change and move people to take action. Like the Avengers, you can't rely on one force alone. In this case, the data and numbers. You need a mix of other powerful forces.

You'll soon uncover a 3+1 formula to inject your case studies with "action power." Adding these together can create a great experience for everyone and boost your effectiveness ratings even more. You will be able to elevate your relationship with your successful customer, connect with and engage your buyer to make a better decision, and stand out as a company who understands and appreciates your customers.

Now that you have some facts, let's break this down and find out what makes a case study so darn effective.

## What Makes a Case Study Effective?

Case studies can be a powerful way to gain credibility and trust, shrink objections, and get people to take action.

They have traditionally followed a similar process briefly describing the challenge a customer had, the solution, and real results. The focus was on the numbers, the data, and the products and services of the provider.

In the eyes of the buyer, it's safe, it's factual, and it proves the past. It also validates the success of a product, a service, and the company who developed it.

**"It's safe, it's factual, it proves the past."**

Companies in any industry, from technology, finance, healthcare, retail, real estate, to nonprofits and more, can benefit from showcasing their customers and sharing their success. It's crucial to

connecting with new customers and strengthening relationships with existing ones. Companies can see a return on their investment in a short time from effective case studies.

## Why Are Some Case Studies Not as Effective?

In the past, the traditional format has been very effective. But now, with digital communications, and a crisis like this pandemic, customer experience has jumped front and center.

People research on demand for reviews of experiences other buyers have had on sites like [Amazon](#),<sup>6</sup> [G2 Crowd](#),<sup>7</sup> and [Trip Advisor](#).<sup>8</sup> They're not just looking at the numbers. They want to know how companies will help them achieve their goals, eliminate roadblocks, and make their lives easier.

Traditional case studies are very formulaic, describing the challenge, the solution, and the results. The provider is the hero of the story and the focus is on the tactics, the data, and the numbers ... boosted online engagement 178% by using My Software, experienced 374% increase in website traffic, and generated \$3.2 million in sales.

The numbers seem enticing and hard to walk away from, but some people are still not convinced. They either perceive the case study as biased and written for the benefit of the provider, or uncertain it can work for *them*. It's missing some critical components needed to connect with potential customers and speed up the decision.

With all the numbers and data out there, did you ever wonder why ...

## Bad Decisions Are Still Made

Annette Simmons, author of [The Story Factor](#),<sup>9</sup> explains that bad decisions are rarely made because people don't have all the facts. Bad decisions are made because people ignore them, or don't understand their importance. Basic human emotions like anxiety, greed, or fear take over.

More facts will not help them put things into perspective. The critical component missing is the story. A story will help them figure out what all the facts mean. This is where a company can miss the chance to turn it right around and be more effective.

**“Bad decisions are rarely made because people don’t have all the facts. Bad decisions are made because people ignore them, or don’t understand their importance.”**

*Annette Simmons*

That’s why the case study is also known as a *Customer Success Story*. It’s a factual and emotional story about how a customer stumbled through

the stress of personal and business trails and tribulations. Then, through ups and downs and new possibilities, came out on top. It’s a story that other potential customers can relate to.

So, let’s dive into ...

## **The 3+1 Formula to Inject “Action Power” into Your Case Studies**

Think Avengers. Just like the powers of the Earth’s Mightiest Heroes, adding the 3+1 Formula to your case studies can easily propel people to action faster than any other type of content. Here’s the formula:

### **1. Personalize the Story**

The best success stories are personalized to your audience and to your goals. What do you want to achieve with these stories? How can you capture the attention of your audience?

First, plan out the Customer Success Story strategy. The best success stories are personalized to a specific industry, company size, location, and demographic. They’re also focused on a situation, goal, or challenge that your company can solve.

Next, focus on your audience. What do they *really* want and need? How will you unfold the story to hook their attention? What do you need to uncover during the interview with your successful customer?

**Personalize the story and identify similar circumstances.**

Then, prioritize the most important company and customer characteristics. A happy customer is the easiest candidate to move forward with. But there are

other qualities to look for that would make a more powerful success story, such as a customer who was very skeptical about change.

The audience you're trying to reach should be able to identify with the customer and his story as they *feel* they have similar circumstances.

The next step is to...

## 2. Make a Connection

Don't make it just about "the sell." Instead, transform your case studies into real customer success stories that connect with your audience, get them to understand the meaning behind the numbers, and inspire them to take action.

[Peter Guber](#)<sup>10</sup> **discovered the missing link in business today.** He is the chairman and CEO of [Mandalay Entertainment Group](#);<sup>11</sup> former CEO of [Sony Pictures](#)<sup>12</sup> and studio chief at [Columbia Pictures](#);<sup>13</sup> along with a list of other achievements. Guber is also the author of [Tell to Win: Connect, Persuade, and Triumph with the Hidden Power of Story](#).<sup>14</sup>

What's the missing link? Companies who focus only on numbers, data, and tactics miss the emotional power of getting people to tell their own stories. These stories get others to pay attention, understand the meaning behind the numbers, and move people to take action.

Guber has built his career on telling and witnessing stories to seal deals, transform companies, and change lives in business. From adapting the story of [Lawrence of Arabia](#)<sup>15</sup> to transform his tribe and reset their journey to success after Sony's acquisition in the early 1990's of [Columbia Pictures Entertainment, TriStar, and the Lowes theaters](#)<sup>16</sup>; to listening to Dr. Robert Maloney<sup>17</sup>, the first surgeon in western North

America to perform LASIK surgery, tell his story of how he got his patients to overcome their fear of the knife.

A story with a meaning is the hook that gets people to feel the struggle, melt away doubts, and be emotionally moved to make changes.

**A story is the hook that gets people to *feel* the struggle, melt away doubt, and moves them to change.**

Take the focus off you and make your customer the hero of his own story. Let him describe his experience in his own words. Uncover his real passion, dreams, choices, struggles, doubts, and

risks behind it all. Give him the opportunity to unwind his journey to success. Then position him as a leader in your industry and get him to see participation as a benefit, not as a favor to you.

When you take the focus off your products, services, and the numbers, barriers suddenly crumble. Instead of expecting the sell, your audience is hooked on the story. They can envision their challenges melting away and goals coming to life by using your solutions.

Sharing stories behind the numbers also helps to shrink objections, reduce risk, and builds trust. It can inspire people to feel good about making a decision to change. In the end, you shine too.

### Customer Success Story Example

**Provider:** Refer.com <sup>18</sup>

**Successful Customer:** SellMore Marketing, LLC <sup>19</sup>

*Doerr explains, "I found myself feeling the pains of my potential clients. I was more frustrated working harder, putting in longer hours, and in the end, less ROI than I would like."*

You also need to ...

### 3. Dig Up Possibilities

Stories get down to the basics. They help people visualize a complex process and make it easier to understand. After you uncover what life was like before your customer made the decision to change, dig deeper. Break it down.

Uncover how it affected him and other people at his company. What options did he consider? Why did the company decide to make a change? Why did they select your specific solution? How did they implement that solution?

These details dig up the possibilities. They enable people to envision how they can put those ideas to work for themselves.

**Enable people to envision the possibilities of how they can put those ideas to work for themselves.**

Customer experience is the backbone to success and is a major movement in any business today. So, take these Customer Success Stories to the next level and ...

#### +1. Show Appreciation

Use your Customer Success Stories as an opportunity to thank your customer and show continued *appreciation* for his business and his success. Create an experience that he will remember and can benefit from.

**Create an *experience* that he will remember and can benefit from.**

For example, give him elite status. Highlight him as a leader in your industry who has eliminated the roadblocks to success. He can use the success story to drive his

business results too. If written effectively, it can also make a great tool for recruiting internal candidates and partners.

Think of creating a Customer Success Story Program with all of the customers you chose from Step 1 of the 3 +1 Formula. Offer each of these leaders other benefits for participating.

Some ideas include:

- Invite him as a guest on your webinars.
- Give him speaking opportunities at conferences.
- Offer him special VIP access to top management, product sneak peeks, and beta testing.

In other words, infuse the customer success story with “*action power*” to live on. Continue to build the relationship. Remember, their success breeds your success.

Adding the 3+1 Formula can turn your case studies into unique *Customer Success Stories*. They can give you an undeniable connection with your audience and an undeniable competitive advantage.

You will be able to elevate your relationship with your successful customer, connect with and engage your buyer to make a better decision, and stand out as a company who understands and appreciates your customers.

## Summary

A case study is the third most effective marketing tool. Why? Because in the eyes of a buyer, it's safe, it's factual, and it proves the past. A case study can move people to pay attention to your solutions and *take action* faster than almost any other type of content, if crafted effectively.

Case studies have traditionally followed a similar process. They briefly describe the challenge, the solution, and the results. The focus was primarily on the numbers, the data, and the products and services of the provider.

However, in this age of digital media as customer experience jumps front and center, it's no longer just about the numbers. To hook a buyer's attention, they want to know much more.

Think *Avengers*, the Earth's Mightiest Heroes. They join forces to tackle threats too big for one hero alone. In other words, all together they create "action power."

In your success story, the ROI is just one hero. Why not add other forces and inject "action power" into your case studies? Turn them into powerful customer success stories that people will remember and take action on.

Here's the 3+1 Formula to add to the ROI and pack a more powerful punch:

1. ***Personalize the Story.***
2. ***Make a Connection.***
3. ***Dig Up Possibilities.***
- +1. ***Show Appreciation.***

By adding the 3+1 Formula, you can move people to action even faster. Once the story connects with what your audience cares most about, the numbers and data become even more important. In the end, your company and your solutions will shine.

And so will your successful customers. They will see it as a benefit.

To make it more unbiased and save you loads of time, hire a third party writer to help you plan, manage the process, do the interviews, and write the story. Your happy customer may feel more comfortable opening up about his/her feelings to make an even greater impact. It also empowers your customer to make a contribution as a partner and an advocate.

*What is your Customer Success Story or Case Study Plan?  
Do you find it easy to get your successful customers to participate?  
Do you focus on the data, numbers, and your solutions or your  
customer's story?*

If you have any questions, need help to plan, or need to write your customer success stories, reach out for a free 20-minute discovery call. Please send me an email at [debm@contenttriggers.com](mailto:debm@contenttriggers.com), connect with me on [LinkedIn](#), or call me at 603 264 1681.

Here's to *Action Power*,

Deb Monfette

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#### **Credits:**

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## Deb Monfette

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My favorite quote is from Walt Disney, "Do what you do so well that they'll want to see it again and bring their friends." I'm the founder and content creator at Contenttriggers LLC. I help companies find creative ways to craft content that attracts customers. I work with executives, marketers, product managers, and even owners to rethink how they communicate through stories and other content. We position their ideal customer at the center to grow their business.

My experience is diverse for a reason. It allows me to step out of the box when I need to. I have experience in technology, customer engagement, health and wellness, creative services, and retail. For over 22 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. In fact, I've managed the startup of one of the first 3-D package design studios in the country.

Storytelling is my passion. It allows me to find possibilities in life and in business. I have a love for great design, photography, and fine dark chocolate. I have a husband in the printing industry and a daughter in fashion design and production.

To learn more about how I can help you, check out Resources on my website at [Contenttriggers.com](http://Contenttriggers.com).

If you're on social, connect with me on [LinkedIn](#).