

Writing Case Studies

Session Title: Case Studies Coaching Call

Ed Gandia: All right, everyone. Well, good afternoon, good morning, depending on where you are, good evening. Ed Gandia here, author of writing case studies and it's great to have everyone on this call. We've gotten quite a few questions and I will be ... basically, I'm just going to jump right in and start addressing these. These are some really, really good questions. I think you'll see a little bit of overlap among some of these but there are some nuances that I'll address. So, let me just get right to it here. Let's see the first question came from Steve. These are in no particular order. I'll just go as I see them here in front of me. Steve's question is, "Ed, I like your idea of working with PR firms and other businesses as a specialist to get started."

"Do you have any tips for finding these types of potential clients and any suggestions about approaching them and marketing yourself to them? If you are new to B2B copywriting, is case studies too narrow a field in which to start your career?" These are two questions. Let me address the first one. Great question Steve. Yeah, I love the idea of approaching PR firms, marketing firms, ad agencies and so forth. These people are not going to have a lot of in-house writers. In some cases, they don't really have any. The great thing about marketing to these people is they really need what you offer on a weekly basis. You shouldn't be afraid that gosh, I wonder if I'm bothering them, is this really relevant? This is very relevant to them.

Believe it or not, they don't get approached by writers all that often, and when they do ... this has been the feedback that I've gotten from some colleagues of mine in PR firms. They're not really that good. They don't really have anything that makes them stand out. They don't follow up. They're not professional. It seems like they're just kind of running through the motions and they're kind of maybe desperate for work and they just make one attempt and that's it. What I've been told is gosh, I wish ... it's all about timing. I wish some people would be diligent to stay in touch in a meaningful way, not be a pest but just kind of stay in touch because many times it's really whoever comes to mind first that I'll contact. So that's been the feedback that I've gotten. Now, in terms of how to approach these types of firms,

we could spend really the whole hour talking about that because there are many different ways you could do it.

Let me do this. Let me give you a long term approach that's very effective and then, kind of a quick approach that you can start implementing right away and really start practicing on a weekly basis. The long term approach is very focused networking. So, specifically, of course, you could do this online but let's say you live somewhere where there are some groups, some marketing groups and let's say PRSA, Public Relations Association of America, or I forget what it stands for, but these are going to be high probability prospects for you. So first, find out where do they hang out locally and go to a few of these association meetings.

Get to know some of the people. You're not there to really try to sell a project. You're just there to kind of get a feel for the group. Then, narrow down your groups to maybe one, two at the most. My recommendation is not to go broad, it's really just to pick the best one or two and to go deep within that group. So make sure first that you like the people, that you like what they're doing, that they're active, that there are many potential prospects for you. In this case, PR firms, marketing firms and so forth, and get involved. So don't just show up for the networking event. Join a couple of the committees, join the board of directors. It's easier than you think. These organizations, many times, have a hard time finding volunteers, so that your cost is going to be your time.

This is where your prospects are going to come from. It's not going to be from the people you meet at the lunch and learn. It's going to be from the people you serve with on a committee. They're going to get to see your writing in action. They're going to get to see how you work. They're going to see your level of professionalism. So this is how you do it. You go locally and you don't pitch from the start, you just get to know these people. That's worked for me. I used that for years and it was extremely effective. I still get referrals from people that I serve with years ago, on a board of directors and their local association. So that's ... the networking thing, it's been proven to work. It works very well but it's a longer term effort.

A shorter term way you could do this, it's a little bit more efficient, it can give you some results pretty quickly, some of you are familiar with this already, because I've been talking

about it a lot recently, is warm email prospecting. So this is the equivalent of a cold calling but doing it through email. It's not even cold, because you are approaching each prospect individually with a very specific message. One way you could do this is start looking at PR firms, marketing companies and ad agencies that seem to be working with other B2B companies, companies and clients that you would love to do work for. So you got to make sure that they're qualified in that respect. That they would have a need for a case study writer or at least a B2B copywriter.

So make a list of those, you don't have to have a huge list, 10, 15 is plenty to get started with and start sending each an email. Before you do that though, you got to make sure that the email is very personalized and what you want to do is you want to take a look at the firm, see what they're doing, take a look at their news page, that they land some big client recently. Are they expanding? Are they doing something new or different? Then, reference that in your email. Your email needs to be very short, 100 and 125 words long. That's it. It could go something to the effect of, "Hi, Linda. My name is Ed Gambia I am a local business to business copywriter specializing in writing case studies. I'm writing because I recently saw the news about your landing, the ABC Company account. That's fantastic. Congratulations on that."

"Wanted to see if it would make sense for us to connect. This is an area of specialty for me. I don't know, if you're looking for anyone in this area right now, but I'd love the opportunity to talk with you and see if it makes sense for us to do some work together." Something along those lines and notice how personalized that message is. It's non-threatening, you're not saying, "I'm the best, you need to hire me." You're saying, "I noticed this about you. Very cool. Congratulations. We might have a reason to talk here. I'm not sure but here's who I am, here's what I do, should we be talking?" That kind of approach to a PR firm, marketing firm can be very, very effective.

Again, these people need what you have to offer. As far as who to contact, the creative director in an ad agency or marketing company is always a safe bet and the smaller ones, one of the principles and then, sometimes it's a one man show, one person operation. It's a solo business, it's a freelancer. So you can look at that, of course, contact them. So it's really not that hard but it's a matter of just focusing your list of people you're going to

contact and then start contact them with a very personalized and relevant message. On terms of, "If you're new to B2B copywriting, is case studies too narrow field in which to start your career?" There have been a couple of questions about this.

The answer is not necessarily. There is enough case study work out there to do that. It really depends on your goals. I mean, if you have some pretty aggressive goals, I wouldn't position myself strictly as a case study writer from the start. So, all your messaging on your website, it shouldn't all be geared towards the fact that you're just a case study writer, that's it. You're limiting the opportunities that could come your way and you could potentially be leaving money on the table there. So don't limit yourself initially, case studies now, you could say you're a business to business copywriter and you specialize in writing content but with a focus on case studies.

You could say something like that. In fact, I would probably recommend that and then see what happens. Get out there, start prospecting, start getting some work and as you see what you're getting and what's available and what seems to really resonate with your prospects then adjust your message accordingly. Again, I'm going to touch on this again, because somebody else had a question, it was a little bit more detailed, so hang tight, because I'll give you some more ideas there. Thanks for the question, Steve. All right, so Kendra had a question. She said, with the exception of this course, I have no other training or background in any other aspect of B2B writing.

I would like to market myself solely as a case study writer, but I'm concerned that being too narrowly focused may hurt my chances of landing clients. Do you think it's feasible for me to limit myself strictly to writing case studies or do you recommend that I become fully educated in all forms of B2B writing? Does this question sound familiar? I think it does. So here it is. Here's the one that I mentioned. All right, she's new, she doesn't want to limit herself too much. So here's what I would say. Again, don't be too narrow from the start, unless you have a really good reason to do. Let's say you already have a track record of writing some case studies.

You already have some really good leads, maybe a client or two, that's a different story, okay? You have something to go on, you can feel confident that you can go in that direction with very little risk. If you're totally new, you don't know, I wouldn't limit

myself. The other part of her question was, "Should I wait until I'm fully educated in all forms of B2B writing before I go out there?" Do not wait. Do not wait until you think you're ready, until you think you're fully versed in every type of project that you might be asked to write because you'll never be fully versed. If you do that, you'll lose your momentum, you won't take action and the risk of failure is extremely high.

So don't wait, just get started. Go out there, you've gone through this program, you have a lot in there. I mean, I try to give you everything you'll need to get going and then once you get going, I've given you everything you need ... that you'll need as a reference. So go ahead and get out there, see what you can find and play by ear. Now, again, once you get started, it's not too narrow, but it might be at first. So a really good analogy and I think this might help address this issue because I know it's a common concern, and I have the same concern early on and I'm going to tell you my story here in a minute.

A good analogy is ... those of you who went to college, think about when you are asked to declare a major or when you are asked by your friends and family, "Okay, great. So what are you going to major in or what are you majoring in?" And you hadn't even started or you're a freshman, and all that pressure to declare a major. That's a lot of pressure. Okay, now, those of you who went through this, how many of you declared a major and actually ended up working for years in that field? I'm willing to bet that in most cases, the answer is probably even no one or very few of you ended up in that situation. So this is kind of like picking a major.

You can pick it but you have to know that the chances of you really doing this or working out the way you think it's going to work out are probably very slim. Now, I'm not saying you're not going to write case studies, not at all. All I'm saying is don't stress out too much over the fact that gosh, how aggressive should I be in my message about just being a case study writer? Don't go too narrow. Just talk about what you do. Maybe mention the specialty in case studies but go to market with that message and see where it takes you and then, make adjustments as you go. So here's what happened to me. I had a similar problem and the reason I got into business to business copywriting is I was doing my own lead generation as a salesperson, selling software.

I was writing my own sales letters, setting up my own ... really executing my own campaigns, doing the whole bit and I was really good at it and I thought, I bet other ... I can find clients who will be willing to pay for this. I'm pretty good at it. So I marketed myself as a lead generation specialist and I did get some clients doing that but guess what happened? Many people responded to my sales letters and my warm emails and all the other things that I was doing to market myself but they would say, "That's great Ed, but what I really need is someone to write this white paper or someone to write a case study for me or somebody to write a brochure. Can you do that?"

I didn't say, "No, I can't." All I do is lead generation. I said, "Yes, sure, I'll help you," and then I would try to figure it out. If I didn't know how to do it, I would figure it out on my own. I would buy a course, I get hold of a book, anything I could get my hands on. Back then there really wasn't a lot, just to try to figure it out and it might take me three, four times the amount of time that it should take me once I know what I'm doing, but that's fine. That was an investment that I was willing to make. So fast forward several years and 95% of the work I do is content development, white papers, case studies, bylined articles, which are ghost written articles and so forth.

I do very little lead generation these days. I do a web copy. Had I been very rigid from the start, I wouldn't be where I am today. So the lesson here is, it's okay to go to market with something but don't be too rigid, be flexible, be willing to kind of follow the path and you know what, if you end up being very successful writing projects that you love to write and you end up, really not writing a ton of case studies, I hope you are okay with that. At one point, you say, "You know, this is great, I love doing this but I wish I would write more case studies," and it's okay. Create a campaign around that and go for it.

In my case with lead generation stuff, there came a point where I became so good at the white papers and the case studies that I just kind of forgot about the lead generation stuff. Now, that I ... yeah, I didn't get mad at the fact that I wasn't doing it. I was making really, really good money. So you have to have a little bit of perspective going into this and most of you going to end up writing a lot of case studies, I know that but if you don't start that wave, and that's how you go to market, that's okay. Don't get too stressed out about it. Again, it's like a college major, just go with the flow. You have to have a plan going in. I'm a

believer in that but see where it takes you and just kind of follow the flow.

All right. So we got a question from Mac. Actually, we got three part questions. So let me just read each one individually, "If your target audience is CEOs, for example, then I understand that by interviewing a CEO, it will be the key to getting the lingo, insights, views and more. Are there any other ways to get in touch with how the target audience thinks?" Now Mac, I'm assuming that your question is referring to when the target audience for the case study that you're writing for your client is CEOs, so not your target audience as a freelancer marketing your services. So based on the context here, I'm assuming that that's what you meant.

So my answer actually would apply to either one of these scenarios but let me answer it based on, if your audience with the case studies are CEOs. A couple of things you should definitely do. First of all, look at your clients' other case studies that have been written for that audience. In many cases, you're going to be writing for companies that have already written some case studies. So hopefully, they already have some and that way, you can understand what voice who are using the tone, style, and so forth. The other thing I would do is I would look at a few publications that this target market reads. So let's forget about CEOs for a moment. Let's say, industrial engineers, that's going to be the target audience for this case study.

You really don't know what lingo they use, what they talk like and so forth. Just start doing some research online and look at publications targeted to industrial engineers, okay? It's never been easier to find that information online. It used to be, you have to go to the library, right, and then see ... hopefully, they had a publication for industrial engineers. Now, all these publications are online. You can very quickly get a grasp for the language that's being used, the style, the tone, that sort of thing. So that's another great way and then, the third thing I would do is if you end up ... if you find yourself writing for the same type of audience, so in my case, most of my clients are writing to senior executives.

So we're talking vice presidents, executive vice presidents, C level executives, not low level management. So these are director, VP and up, C level. Make it a habit of reading books that that audience is reading. For example, read one best-selling

business book a month, a business book that this audience ... you know this audience is reading. One business book a month is 12 books a year. It's amazing how much you'll pick up and you'll internalize, if you read what these people are reading. You'll just start writing in that voice, in that style and that's a healthy thing. Plus, you'll understand a lot of the lingo. You'll understand the trends, a lot of benefits come out of this.

So again, if you're starting to write for that same audience over and over again, get into their world, read what they're reading, listen to what they're listening to. Mac's second question was, what is the standard percentage to discount for large projects of several case studies? Okay, I wouldn't say that there's a standard percentage of it that you should discount but let me kind of give you a rule of thumb and this is just based on what I do, okay? You may find that in your case it's going to be a little different or you may not agree with us but I've had several clients that have agreed to give me all their case study work over the course of a year, where they've given me a certain quantity.

I've discounted it 10 to 20%. So instead of 1500, for example, which is what I charge now, typically, and I'm starting to go up into the \$1800 level for new clients, but \$1500, if somebody's willing to give me, let's say, one a month, for a year and I try to get a defined number, so we don't fall behind, I would be willing to do it for 1250. You can still be very, very profitable because you're going to get to know the company, their products, what they're looking for. So you're going to become much more efficient by case study number three, and the 1250 is going to be very, very profitable, come case study number four, case study number five.

So, just something to think about. Now, a couple of key things to keep in mind, don't go on promises. Very common for a client to say, if you give me a really good deal, if you write it for 800, I'll give you all our case study work. We have so much coming up. So don't fall for that. I'd say 90% of the cases, that's just not going to happen. I used to hear people say that and I didn't believe them, and I did it, and sure enough, two times, I think I did it, it never materialized. So don't go on empty promises. If they want you to discount the work or if you feel that you should probably offer them a deal, make sure that it's based on them giving you a purchase order for so many case studies over the course of a certain period of time.

Otherwise, you're going to end up losing a lot of money and you're going to be very frustrated. Then, make sure that they understand the deal. Make sure that they understand what your normal rate is. Hey, I normally charge \$1500. We can do six or more. I'll do these for 1250 each. So just make sure they understand what they're getting. So there's a give and take. All right, Mac's third question. "In the course, you mentioned about using case studies as the background for a bylined article, a ghost written article. Could you give a three to five step primer on how that works?" I'm not sure if I can give you a primer but let me give you an example of where this is going to ... a case study is going to work into a potential byline article or ghost written article project for your client.

How you can turn that case study in other words into another project. Typically ... all right, so let me take a step back, so a bylined article, which is a ghost written article, you're writing an article for someone in your clients' organization, on their behalf, they're going to have their byline on it, so it's not going to be written by you. It's going to say written by Tim Smith. A byline article is your client talking. It's your client giving out information. Okay? A case study is different. A case study has really the point of view of a reporter, reporting a story. So it's very different, the two pieces, the two types of projects are very different. Now what you can do is use a part of a case study as proof, as a credibility element, as fodder in a ghost written article.

So let's say that the byline article is about, let's say small food producers in the US and how they can use technology to compete and really get ahead of their competitors who are not using technology and with all the new regulation that's coming, they're going to be left behind and possibly go out of business. So you're making your case, as the writer for this ghost written piece. You're making your case, you're stating the challenge, you're stating the situation, the business drivers and then, you start talking about, "Okay, well, here's some examples of small food producers who have adopted technology in order to get ahead, in order to strengthen their business for tomorrow, for what's coming."

Then, you'll talk about three stories, those three stories can be condensed versions or parts of three different case studies that you've either written for the client or the client already had. So that's where it's usually going to come in. Now, what you should

do is you should work with your client once your ... of course you've been working with them for a little bit to go through their case studies and identify some ideas for some ghostwritten articles based on the stories that they already have. Many clients really appreciate that because they won't have the time to think through that but if you can find some really unique hooks, some really cool ways to frame a story, they'll really appreciate that.

So now, you could potentially land another project. Again, it's usually going to be part of a story, part of an article. It's not going to be the article itself. I've seen it where the article itself is really a case study in disguise, but you need to shift the tone and the approach. It's not going to be ... keep in mind a case study is going to have quotes from the client. So you're going to have to write it a little bit differently, because you're not a reporter. You're now an executive in your clients company giving out information. So it's going to be ... you need to rework the piece essentially, is what I'm saying. Hopefully that answers your question, Mac.

All right. I got a question here from Scott. Scott says, "I'm an English teacher but I'm looking to move out of formal education. I've had several pieces published so I know I'm not lacking in writing and editing skills. My question is this, how do you suggest I transition from teaching to case study writing, given that I'm not from the business world and I have no portfolio right now? Should I start with pro bono work or writing on spec? What is your counsel?" Yes, you should consider pro bono work and writing on spec but let me give you some ideas on how you can do that. Well, first of all, I would start with your network.

So if you're coming from a completely different industry, in your case, you're an educator and you're going to be writing for businesses, look at your network and I talk about this all the time but I'm a huge believer in leveraging your personal and professional network as a freelancer, especially when you're starting out. You need to ... when you're starting out, the biggest thing you need to overcome is the trust factor. You've hung your shingle, you set up a website and you have absolutely no experience. Of course, you've taken a couple of program, so AWAI, let's say, so you know how to write these pieces but just because you've hung your shingle doesn't mean that the world will beat a path to your door.

Okay, so what you need is a bridge, you need a way to kind of get in to the other side and how do you do that? Well start with the people who know you, people who trust you and that's going to be ... there's no great way of doing this. It's not something you do in an afternoon, when you've gone through your whole Rolodex. This is going to take some time. You got to go through your address book, your LinkedIn account, see who you're connected to and start thinking, where do these people work? Do they work somewhere that would be maybe a potentially good client for me or are they entrepreneurs? Are they small business owners and they might be able to use me, okay?

Do they know someone who could potentially use me? Those of you who know my story know that this is one of the things that I did early on, is I started scheduling a coffee and lunches with people in my network and I would just tell them what I was doing. In most cases, none of these turn into anything but a few turn into some really, really big opportunities. One of them in fact ... and this is years ago, one of them turn into a client that is still a client of mine, seven years later, it's been seven years and that came from a lunch that I had, I explained to my friend what I was looking for, what I was looking to do and she got it immediately.

I said Look, I can't help you directly, but I know someone who can and she put me in touch with somebody else who knew me but didn't know me as well. She worked for a company where she was leaving me with someone to kind of fill in the gap from a writing standpoint. She brought me in. I came and introduced, I was asked for no samples. I didn't need any references, nothing like that. I met with the VP of Marketing and I had a project that afternoon. So don't underestimate the value of your network. Maybe the people you were connected to directly can't help you in their own businesses but they maybe know someone who does.

So, keep that in mind, I think it's going to be key for you. The other thing is, as far as like how to approach them and great, I know them but I don't have any experience, it's okay to offer to do pro bono work. So that's how I got started as well. I didn't have any writing samples. I was trying to go for the software industry. I came from the software industry but ethically, I couldn't use samples that I was writing for my employer. I was still employed. I just didn't feel that was right and I didn't really want to expose myself that way. I didn't want really questions to

be raised. So I needed to get some samples quickly and what I did is I went to an online forum, a Yahoo online forum for small businesses.

Now today, there's LinkedIn, LinkedIn groups. There's all kinds of groups in social media, you can do this in but online forums don't discount though. There's still a ton of active groups out there. So this is a group of small business people from really all over the world and I posted an offer there. I said, this is what I'm trying to do. I'm trying to launch my business. I need some writing samples. I'm really good at what I do but I need to get those samples quickly. So I'm willing to do a free project in any one of these areas and I listed, a brochure, sales letters. I didn't have case studies on there, special reports and I forget what else. If you think you could use this, there's no cost. All I ask is that you let me use it as a sample and that if you like what I produce for you, that you give me a testimonial.

I had more than 20 people respond within 24 hours. I picked the best three, the ones I thought I could help the most and have three samples within a couple of weeks. So don't discount the fact that you might be able to ... it's worth giving this stuff away for free in order to get what you need quickly. I mean, you got to let these people know this is not what I normally do. I'm just willing to do it for free in order to get these initial samples. Nothing wrong with that, as long as they understand that and they need to understand that because they want to hire you to do more. They need to understand that it's not going to be free.

Then, the next thing I would suggest Scott, is look at this as stepping stones. You're not going to go from pro bono work to a dream client overnight. What you're looking for is let's say you start with your network and you write for some small businesses, people in your network. So, you leverage those to then get your next client. Now, you have something you can show, plus you have more self-confidence because you've written something. Something, it's good, that worked. Your client liked it. Maybe from there, you can go after some companies that produce educational materials, instructional materials, training companies. I mean, gosh, with your background, I would really look at the educational industry. It's obviously huge.

A lot of companies, a lot of B2B companies that need to produce a lot of written materials. So all you need is you need to get

started and then, steppingstones. You leverage that to get your next win. You leverage that next win to get your next win, and so forth. That's how you get to the bigger fish is you start small and you leverage each success to get the next one. All right, check here on time. All right. So moving right along. Let's see, we got a question from Alan. Alan says, "I realized that many types of companies are good candidates for case studies, is there some sort of general criteria for the type of company that makes them a great candidate for case studies? For example, product companies or some service companies, end item versus component, high costs of transaction versus low costs."

All right, so let me give you some criteria that I would look at because there are no defined markets that definitely need case studies and those that don't but there are some criteria that make them a higher probability prospect for a case study. So high tech, anything in high tech, technology, absolutely. That's a no brainer. Technology is continually changing. They need to continually write new materials and so that's it. That one is a given but everyone thinks that that's where it stops and it doesn't. There's energy, a huge business. I don't need to tell you that. Healthcare, massive, tons of companies there. Medical supplies, medical equipment, healthcare services, insurance companies, manufacturing.

I mean, that could be ... it runs the gamut there. Industrial equipment, professional services of all sorts. You're talking, anything from tax, audit, business consulting, professional, IT services, financial services, business services, banking. I mentioned insurance already. Green products and technologies is another hot one. Architectural Engineering. Construction is another huge one. I write for that industry, in fact. Agriculture, it really ... those are some of the hotter ones, but really all over the place. So let me give you some other criteria. Anytime where the cost of the product or service is high, that's going to raise the chances that they're going to need case studies.

Where the risk of the transaction is going to be high. Of course, the higher the cost, the higher the risk to the customer, correct? There could be other factors. It's not just the cost of the fact that this is going to take three years to implement so I got to make sure that I'm making the right decision as a buyer. So whatever, the risk is high, cost is high, anyone selling or developing new technologies, cutting edge products and services, it doesn't have to be high tech. Just anything new and

different, new types of solutions, where there's a high need to educate buyers, that's another big one, a big indicator. It's not the kind of thing that you already know if I tell you, "Oh, I work for this company, we make X."

If you can't explain it that simply and you need to educate buyers as to what it is and to what the value is to the buyer then that's going to be a prime candidate for case studies. Anything that's not a commodity. That would be another great way of looking at it. If you're selling ball bearings or something industrial, that's just a pure commodity, bolts, hardware like that, that's going to be a little tougher, but if you're selling ... Now, you could be selling to that same industry, kind of a very boring industrial industry but if you have something that's very special and unique, kind of a new approach to tackling something, it's been done the same way for 50 years, prime candidate for a case study.

So, I hope that helps Alan. Really, it varies but those are some really good criteria. All right, Kirk had a question, "How do we identify good prospects to market or case study writing services to and what are the most effective way to close a sale?" All right, so hopefully what I gave Alan here in the previous question, will get you thinking in the right direction, Kirk but let me give you something else because you brought up a really good point here and you may not realize you brought it up. Here's a good litmus test for you, if they already have one or more case studies, either on their website or they're talking about it and they say, "Hey, if you want to read this case study, fill out the form and request it."

That already makes them a good candidate. Okay? If they don't have case studies or they don't know what a case study is, you want to move on and I'm serious about that. Your job here is not to sell the value of a case study and there was a question about this a little bit later that I'll get to, in a few minutes but if you have to spend time selling the value of a case study, you're wasting your time. There are businesses out there that are set up to spend time, money, resources, educating buyers. I get that. We're talking about big businesses here. IBM has spent a lot of time and money educating and so do a lot of other midsized to large companies.

You're a solo business. You can't afford to spend that time. You have to go where there's already a demand, where they already

get it. I know it's tempting to go to local markets and then try to sell all these small businesses on this idea. I get that. I get that you're there. You see a need. You see how you can help them. You wanted more than they do. If they don't already get it, you really going to waste a lot of time, you're going to get frustrated, you're going to quit so don't do that to yourself. Go to where they're already using them. There are plenty of companies out there already using case studies, already understand what they ... who already understand what they are, for you to waste time with those that don't get it already. Okay.

Now to close a sale, you asked what's the best way? That's a big topic but here is some criteria that I would look at. It really is not so much you closing the deal. Again, this thing, they need to be the right prospect. They need to have pain. They need to have a need for a case study. That doesn't exist. It's going to be ... you need to move on. So they need to have identified that need for a case study. They need to get that. That's the first thing. The second thing is timing. I just want to know, when are they looking to do this. If there's no urgency associated with it, that's going to tell me how much time I need to spend on that prospect.

So timing, make sure that you understand when they're looking to get this done. Authority is another big one, and you have to be a little careful here because you could step on some toes if you ask it the wrong way but you want to know who's going to be involved in the decision to hire a writer for this. Sometimes I've gotten calls from people who are just doing some initial research or just shopping around. They're not going to be the ones making a decision. So, I want to know that early on because I don't want to spend a lot of time with someone who's just shopping around right now but they're not the final decision maker. Then, finally, their ability to spend what you're worth. Their ability to spend \$1200 or more for a case study.

If you're dealing with someone, let's say a solo business or a very small business, who maybe gets it, maybe they understand that, I need a case study, I need some case studies but they don't have the financial wherewithal to spend \$1200. They were thinking this would cost \$300, that's not a good prospect for you. So I guess what I'm saying here, Kirk is there's ... I'm not going to give you a formula to close the sale. What this is, is a formula to qualify the prospect better so that you end up working and spending time on those that have a higher chance

of closing. If you do that, the sale just kind of closes itself. It's more of a send the proposal at that point and you call to follow up. Did you get it, when can we get started?

It's that kind of thing. It's never a hard sell. It's never a, you got to go in there and start working sales techniques from a book. It's just ... that's not going to work. That's not where you want to go anyway. All right. So moving on, because we got a few minutes left and I still have a few questions that I got to go through. Debbie had a question, "I am very literal in my thought process. So this might be clear to everyone else but what is the difference between a case study and a testimonial? Some of the examples and samples I read look like testimonials, are they the same thing?" They're not the same thing. It's a good question.

A testimonial is ... I don't know the exact textbook definition but a testimonial is something that says, "I like this, I like this product, it worked for me and here's why." Now, sometimes it has some of the elements of a case study. So we'll have the challenge. I was having trouble with this, I bought product X and it had solved that problem for me. Thank you ABC Company, right? So it might have that but it's not a story. It's a statement saying this worked for me. A case study is much more detailed and it's a much more detailed story. It's an actual fleshed out story. It's going to have a challenge. It's going to discuss what the challenges were. It's going to talk about their journey to finding a solution.

It's going to talk about the solution that the customer settled on, that they bought and then, it's going to talk about the results they achieved from implementing that solution, whether it was a product service or what have you. Okay, so it's much more detailed than the testimonial. Some testimonials might be lengthy and might kind of really read like a case study but most are not. Most are a, "I like this. It worked for me," type statement. Good question. All right. Somebody else had a question here. Let's see, "The necessity to have professional content rich and design effective website is a challenge. Even good LinkedIn postings are detailed and portfolios are a professional staple."

"The instruction that precedes the session suggests offering services in exchange for references and/or the ability to use copy in one's professional representations. This has potential, more suspect with clients who may be budget challenged.

There's also the time factor. It seems logical that the sooner one can develop credentials and a presence in the market, the better. The question is, is there any substantive value in putting up a website with description of services and the writer's relevant background until the site can include references and/or the ability to link copy examples?" Absolutely, yes. Don't wait. Your site doesn't have to be perfect. I went to three iterations on my site before I really got going.

One of the things that really holds people back is they want to wait until everything is perfect, until they have the samples, they have the testimonials, they have something they can talk about. If you wait, it's just going to take forever, you'll never do it because you'll never be perfect. So you have to draw the line at some point and say, "Okay, I don't have a lot but I'm going to go with what I got." Go with what you got. Don't talk about what you've written before, talk about what you're capable of doing or what you're willing to do. So let me get to the second part of this question, "Related to this issue, are there any other means by which one can tout credentials on a site until references are available?"

Absolutely, so you want to talk about your background, your experience, your knowledge, and you want to talk about what makes you different. So, if you're brand new, you haven't written anything yet, hopefully, you can leverage your background and talk about that because that's really what you're going to bring to the table. Let me be very clear about something guys. This is so important. Again, the world is not looking for another copywriter. The demand is huge. Yes, it is, but what the demand is the demand for people who bring something to the table beyond writing skills, it's a given that you have to know how to write a case study. It's a given that you have to know how to write these things at a competent level, okay and that's why you guys invested in this program.

You have to know that but what's going to get you hired, what's going to get you more and more projects with these clients is the ability to come in to the client already kind of getting it. Understanding the basics of their industry, their business. You may not have worked in that business before but maybe you've done work for other clients in that industry. That's once you get going, when you're getting started, look at your career, look at your work background. What have you done before. Even if it's been, "Oh, but my last job was five years ago or there's an

industry I'd like to target but I haven't been there in 10 years." It doesn't matter.

What experience, what skills do you bring to the client? Think about that real hard because that's what's really going to make you valuable until you get that track record with more clients. So first, it's going to be what you bring from your previous history and then once you get going, it's going to be your track record as a copywriter, plus your previous background, that never goes away. Okay? So just get started. Think about what makes you different. When I say what makes you different, it doesn't mean what makes you absolutely unique. Just what makes you different from most or from many other competing copywriters.

There's something about you, it's usually one or two things or more, that make you a little different than the rest. What are those things? Talk about them and don't apologize for not having samples, don't apologize for things that are missing. Talk about what you do have and put the focus on that. You'll get the other things as you go on. All right, Julia asked, "My question is this. How often do your clients ask you to use a standard template for the case study you're working on for them? Can you give a percentage of how many have won versus how many don't have a template? My current clients have been happy with my layouts and structure but I'm just curious what to expect as I start working with larger clients and companies."

As you start working with larger companies, they're going to have something already, I'd say about half of my clients had something already designed. The other half didn't either because they were an emerging company, they were kind of starting out and they were still creating those things. So it was really up to me and up to the designer that I either brought in or that they brought in but in many cases, they're already going to have something that's working for them, they want consistency. So it's got to fit within that template in terms of length. That's good for you because you can take an existing PDF, let's say that ... one of their case studies, if they don't know what word count they're looking for but you can get a word count on that PDF.

The way I do it ... I don't know this is pretty low tech but the way I do it is I do a select all on the PDF which is Control A on a PC or Command A on a Mac. I do copy and I paste special in Word, onto a blank Word document. So I just basically dump all the text on there and then, I just do a word count. That real

quick tells me, "Okay, we're working with about 1200 words and it looks like that was stretching it so we may be looking at 1000 to 1200." That's what they don't know. Usually, it can tell you. Yeah, just be on the lookout. Many of them are already going to have something. Now, what you're going to run into sometimes Julia is that some of them will have kind of a one pager and they're very, very skimpy that they don't get into a lot of detail.

One thing I've recommended to clients who do that is, "Hey, this looks great. If you look at some of my stuff, and I can send you some of them, you can really get a much better, much more compelling story if you expand this a little bit," and add some of the detail. I was going to take it to a two pager but wanted to make sure you knew that that tends to work really well. There's a tendency out there and a lot of marketers are trying to cut everything down, "Oh, we need to shorten it. Shorten it, shorten it." I think with case studies, that's a mistake. I don't think you need to ... if they're five pages, that's too long but trying to get everything onto one page, I think is a mistake.

What prospects want to see, they want to see detail, especially when it comes to a story about what somebody else did with your product or service. They want to see that detail. They want to see what happened. How did they get implemented? What went wrong? How did this company fix it? Those kinds of things and you can't do that really well on one page. So you know, as you get more comfortable with them make that recommendation, "Hey, I would consider going to two pages, it's really going to make a big difference." If they chose to print it, it's still a front and back type piece. So you're not looking at additional pages, if they do decide to print these for a trade show, for example or for a meeting.

It's going to add a lot more, plus, you can get more for that kind of work versus doing a one page or let's say a 500 word case study, which is really ... just a really quick summary. They're concerned about, "Yeah, but we got a lot of busy people reading these. You're not going to want to read the whole thing." That's fine. Offer to add a sidebar, with key summary points of the story. That will help skimmers determine if the story is worth reading, because they can kind of get the main points based on those bullet points from the sidebar. All right. Let's see. We got two more questions. I think we'll have enough time here. One is from Jeff.

Jeff ask, there are a couple of questions, "Where can I find case study related statistics that number one, I can use to prove to clients that case studies can generate new business and number two, which show which type of businesses have the most success generating new sales and new business leads using case studies?" All right, so number one, stats that you can use to prove to your prospects and clients that case studies can generate new business. A few places, I would subscribe online to Business To Business Magazine and I think it's b2bmag.com. Don't hold me to that but just do Business to Business or B2B Magazine, Google that and you'll find it. It's free. You can get the free updates. If there's a study published, you'll be notified, you'll see there.

The other thing is Casey Hibbard, which is the author of Stories That Sell. She's somebody I mentioned in the program. She's got a great newsletter that comes out about once a month and whenever there's really good stats, coming out about case studies, that's all she does. She is ... by the way, for those of you who are asking, "Hey, can I specialize in case studies?" Casey Hibbard all she does is write case studies and she's super busy. In fact, so much so that she's been able to really focus on high tech. She has that luxury because she has so much work, she can just stay narrowly focused there. Anyway, she stays on top of statistics, new metrics, new studies, so subscribe to her newsletter.

If you just look her up, Stories That Sell or Google Casey Hibbard, you'll find her website and you can subscribe there for free. Marketing Sherpa, if you go to marketingsherpa.com, marketing, S-H-E-R-P-A. Awesome, awesome newsletter. They have all kinds of different newsletters actually, you can subscribe to. So when you go and sign up, you can check off the ones you're interested. Definitely do the one for business to business marketing. What they do is they publish not just studies, very detailed studies based on reader feedback and reader surveys, I should say but they also publish weekly case studies on how different companies are using different marketing tactics and strategies.

So definitely subscribe to that and then, Marketing Profs, marketing P-R-O-F-S, marketingprofs.com. They also publish really, really good stuff. I also, in the previous call that I had done, last month, which many of you I think attended, I referenced a study by the Content Management Institute. Let me

see if I have that right and Marketing Profs. That's the one that talked about case studies being the third most popular marketing tactic right now for B2B marketers, after webinars and online events. So check that out, if you Google content ... In fact, let me do it right here because now, I'm wondering if I'm giving you the right information content.

Its Content Marketing Institute. I'm sorry, not content management, Marketing Profs. Okay, so just do ... here's what you need to Google, Content Marketing Institute, Marketing Profs, one word, report. Content Marketing Institute, Marketing Profs, one word, report. You'll see the first two or three results all have the same thing and they'll lead you to some analysis that they have on this. So this is great stuff that you can send to your prospects and clients. Now, the other thing I would say which I mentioned earlier, but it's worth emphasizing is you don't need to spend a lot of time selling this idea, if you have to spend a lot of time selling the idea of writing case studies, if you need to sell that value, I would rethink that.

You're going to spend ... unless it's someone you know well, and you're offering to do this for a couple hundred bucks, just so you can get a sample but they're even hesitating on that but you feel that's your best lead right now. I mean, I can understand that. You might need something to kind of get them moving. In general, I wouldn't spend a lot of time doing this. Now, one idea that's worth doing is you could write a couple of short articles on the value of case studies. This is something I learned from Steve Slaunwhite. I think it's a brilliant idea. What you do is you do a little bit of research as to how well case studies are working. You reference these studies that I'm talking about and you talk about the power of case study marketing.

I mean, you could give it your own unique spin, right? It doesn't need to be that long, 700 words, 1000 words maybe. Get the designer that kind of laid out real nicely on a one pager and use that. When you send a proposal out, send that article too. It's amazing what that will do. It will position you as the expert. Nobody else does that. They're just going to send a quote and that's it. You're sending a quote or proposal and something that shows the client that you really know what you're talking about. This could also serve as something you can quickly send to someone who's not really sure and rather than wasting a lot of time and trying to explain verbally, why they're so great.

Just let them read that, so something else to consider. Then, with her second question, which types of businesses have the most success generating new sales and new business? Again, I'm going to go back to something I said earlier. The risk of the transaction is high, the cost is high, anything new where they have to educate their prospects because it's not a commodity, it could be a standard product but they have a very different way of approaching it. So they need to educate there, so case studies are going to be ... or they approach the business very differently. I saw a web host company yesterday. We're actually looking for a new web host company and they do it ... they do things very differently over there.

Even though web hosting is a commodity these guys had a paid for case studies and there you go. It's an example of someone who's just ... they're doing things differently in a kind of commoditized world and that's one of the ways they differentiate is Google's case studies. All right. This one just came in at the last minute. So I'm just going to read this aloud and it's from Cameron and hopefully, I can answer that. I didn't have time to read it before. "I have a background in book publishing, what industry might find this attractive when looking for a case study writer? Self-help or Internet Information Providers Perhaps?" Gosh, it could be anybody.

I'd say, info marketers, anybody publishing anything information of any type, email marketing companies. I mean, it could be really anything. I mean, I think it's so broad that really nothing comes to mind. Anybody in the book publishing industry. Of course, there's new players, a lot of new players coming out with print on demand. That would be another interesting area to look into. I would go back to something I mentioned earlier, I would start with your network. If you're not really sure and your background doesn't scream, "Okay, this is where you need to start," start with your network and see where that takes you.

The second part of the question, "From your experience, what are the top logical reasons and top emotional benefits gained by marketing managers when hiring a freelancer to write a case study?" All right, so based on what's happening today, let's say their motivation for using an outside writer is ... the biggest one is they don't have the internal resources to get it done and they don't have the budget to hire an in-house writer. So that's going to be a really big one. So they have pain because they have this need, they've been instructed to ... they have been directed to

write all these case studies, all these pieces for the year and they can't do them all. So they need someone from the outside.

Really, they now need to focus on more strategic internal projects, things that they definitely don't want to outsource, but they're willing to outsource for the content development. That's why I'm very busy because my clients ... that's the one thing they don't want to do is a lot of the content development. So that's going to be the biggest motivator. Now, let me give you what they really want, once they find someone, they want somebody who's dependable. They don't want the best writer in the world. Okay, the clients you want to work with, the reasonable clients are the ones who ... they want good work. They want people who already get it, who can come in and will just do their own homework and they'll figure it out and they'll ask questions but they're not on you, every five minutes asking questions.

So people who are kind of self-sufficient, who already get a lot of background information or who're willing to go out and figure it out on their own, and who are going to come through deadlines, people who meet deadlines every single time no matter what. I can't overemphasize that. It's shocking to me this day and age, how many freelancers still don't meet deadlines. It's serious stuff, guys, serious stuff. It might seem trivial sometimes. Well, I don't think she was really in a hurry. You never know, she may not have been in a hurry but once she committed to it, she said a lot of things in motion based on the date you gave her and you guys agreed on. So now to say, "Hey, it's not going to be there," or to just skip it, not good. Not good.

Now, I have had circumstances where I've called my client. I said, "Listen, I'm running a little behind. How badly do you need it on Friday like I had promised?" It makes them say, "Oh, listen, take your time. I'm actually not even going to be here Friday. I'm not even going to jump on this call until it's on, on Wednesday. So you know you can give it to me even next Wednesday, that's fine." In which case, I'll usually say, "No, I don't need until Wednesday. I'll get it to you there over the weekend or Monday, I do need to get it off my plate too. It's a little crazy. I had something happen but if you're sure that that's okay, I will do that."

It's okay to renegotiate but ask and give them plenty of time. Don't call the day it's due and say, "Listen, it's not going to be

there today." That right there, that dependability will trump any amount of skill that you may have. As long as you're competent, they don't care. They just want people who are dependable, reliable, who are truly professional and who really are good at what they do. Then, one final question that he had, "What are the major differences between an online and print case study?" In terms of, for you, the writer, I really haven't seen much of a difference. Some online case studies, if they're, of course, verbal and print, if they're actually written, not a video or an audio case study are a little shorter just because people read a little slower and want to read less on a computer monitor.

In many cases, what I'm seeing is it's basically the same thing that you would have on a PDF. In many cases, say, the case studies today aren't even printed. They're designed, laid out on a PDF and then, that's downloadable. They're not printed unless your client is going to go to a trade show and they need something to hand out, something along or unless they need to put packages together, packets, information packets. Yeah, when you do see them online and they're not on a PDF, they'll be a little shorter because they understand that people are going to not want to read something really lengthy on a computer monitor. So, I think that is ... let's see, those are all the questions that I got. So I think we're ready to go, Jackson. I don't know if you had any parting statements or if you need me to do anything else on my end.

Jackson: That is it. We'll call it, Ed. I hope everyone has a great day.

Ed Gandia: Great. Thanks, everyone. Go out and get them. Don't wait.