



# WRITING CASE STUDIES: How to Make a Great Living by Helping Clients Tell Their Stories

*By Ed Gandia*

## MODULE 1

**The Lucrative Business of Case Study Writing**  
Transcript

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# The Lucrative Business of Case Study Writing

## ■ INTRODUCTION

I was a Boy Scout back when I was a kid, and I specifically remember going on a camping trip one year, where the father of one of my friends told us some great ghost stories. This guy was from Louisiana, which is known for its great folklore and ghost tales, and he promised to tell us some great stories that night during our campfire time.

I couldn't wait because I've always loved a great ghost story. And I can tell you that we were not disappointed. It turns out this guy was a spectacular storyteller, so good, in fact, that even today, 25 years later, I still remember one of those stories in vivid detail. It was so good that I got absolutely no sleep that night! I couldn't stop thinking about what he told us. I wasn't even sure if the stories were real. So as you can imagine, trying to fall asleep was useless. And when I did fall asleep, I had recurring nightmares all night long.

When you think about it, it's pretty amazing that I still remember those stories even today. Not only that, but I also remember the nightmares I had that night. I even remember what the guy looked like, the dad of my friend who told us those stories. I couldn't tell you much more about that camping trip, but I sure as heck can tell you all about one of those stories I heard from him that evening.

That's the power of story, and that's the power of engaging in well-written case studies or success stories.

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## ■ WHAT ARE CASE STUDIES?

According to Casey Hibbard, author of the book *Stories that Sell*, which is a book I highly recommend, by the way, a success story is an overview of the customer's experience with your products, services or company. It usually covers:

- Who the customer is
- Why the company or person needed your solution
- How she picked you as her vendor
- The customer's experience of the solution
- The benefits and the results

Michael Stelzner, author of *Writing White Papers*, describes case studies as marketing pieces that “typically examine a specific company and its experience with a product or service. They often include quotes from a key person at that company and are designed to help prospects see an example of how a solution worked for someone else.”

So essentially, case studies describe how a company or organization solved a challenge with a product or service, and what the results of solving that challenge were. At its core, it's really a “before and after” story.

Case studies can vary in length from one to two pages, all the way to four pages. Some companies will even distill their case studies into short one- or two-paragraph summaries. But I've found that the sweet spot for these documents, for case studies, is about one or two pages in their finished format, or about 800 to 1,200 words long.

Case studies have been around for a long time, but their importance has grown dramatically over the last decade or so. For one, buyers of products and services, especially corporate buyers, have never been stretched so thin. Many of these people are doing the work of two or three employees as companies have cut their staff to the bone. They're

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looking for better, faster ways to make good decisions because they just don't have the time they used to a few years ago to evaluate all available information. Even if they had more time, the amount of information and marketing messages being thrown at them has never been greater, so they need reliable ways to cut through the noise, if you will, and to get to the bottom of things.

There's plenty of evidence that this is actually happening. According to Jeff Thull, the author of the bestselling book *The Prime Solution*, business-to-business products and services are now in what he calls "Era Three" of an evolutionary change that began back in the 1950s. This current era, which emerged in the 1990s, is marked by, as Thull explains it, greatly increased speed of change, information overload and complex problems that have expanded beyond the buyer's easy comprehension.

According to Thull, complex developments have made it more and more difficult for buyers to fully understand their own situations, needs and problems. They may know what their goals are. They may even realize that they have a problem. But they have difficulty trying to determine which components of the problem are most important and how existing systems and business processes are getting in the way.

All that to say that we're living in a very complex world where, again, buyers no longer have the time, the resources or the expertise to learn everything they want about their challenges or potential courses of action in how others have addressed the same issues. Instead, they're looking for easy solutions. They want marketing pieces, namely white papers and case studies, to help them figure out the full nature of their problems and help them determine viable ways to solve and address these challenges.

## ■ WHY ARE CASE STUDIES SUCH A POWERFUL TOOL?

I've just given you some reasons why case studies have grown in importance, but why do they work so well? What is it about case studies that make them such a powerful tool in B2B marketing?

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There are **three** basic reasons:

1. We're naturally drawn to stories.
2. Case studies are excellent credibility builders. Few other things match them.
3. Case studies are an excellent springboard for getting media coverage.

## We're Naturally Drawn to Stories

Let's talk about the first reason, the fact that we're naturally drawn to stories. Ever since the days of cavemen, when men would gather around a fire after a day of hunting, we've been drawn to stories and storytelling. It's in our DNA. We respond to stories much more than we do facts and intellect, and study after study have confirmed this. That's why we love movies, plays, books, engaging lectures, and even TV commercials. We tell stories at family gatherings. We read stories to our children even when they're babies and have no idea what we're talking about.

One of the most well-known authorities on the subject of storytelling and the power of story is Robert McKee. McKee is the author of a book that is considered the screenwriter's bible. It's called *Story: Substance, Structure, Style, and the Principles of Screenwriting*. Many of Hollywood's active screenwriters actually claim him as a huge source of inspiration. Rather than simply focusing on the more mechanical aspects of story, such as plot or dialogue, McKee actually examines the narrative structure of a work, whether fiction or non-fiction, in what makes a story compelling.

I recently came across a post on Garr Reynolds' popular blog Presentation Zen that talks about McKee's views on story and its importance in engaging an audience. I want to quote you from that post because I think it does a brilliant job of explaining the impact story can have on the reader.

"The most common way to persuade people, says McKee, is with conventional rhetoric and an intellectual process that in the business world 'usually consists of a PowerPoint presentation' in which leaders build their case with statistics

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and quotes, etc. McKee says rhetoric is problematic because while we are making our case, others are arguing with us in their heads using their own statistics and sources.

“Even if you do persuade through argument, says McKee, this is not good enough because ‘people are not inspired to act on reason alone.’ The key, then, is to aim to unite an idea with an emotion which is best done through story. ‘In a story, you not only weave a lot of information into the telling, but you also arouse your listener’s emotion and energy.’”

Let me read that last sentence again because it really summarizes why stories are so powerful: “In a story, you not only weave a lot of information into the telling, but you also arouse your listener’s emotion and energy.” That’s why 25 years after hearing that ghost story, I still remember it, and I remember many of its details.

This is also why I remember much of what the pastor at my church teaches. He’s one of the best storytellers I’ve ever heard, and he almost always starts his sermons with a story. Not only that, but he weaves four, five or six stories into every single sermon, and I find myself deeply engaged in his message and recalling stories and lessons years after he shared them with us.

Again, this is why we love great movies and plays, and why we’ll watch them over and over again sometimes. Each time we watch them, we allow ourselves to be drawn into the story, letting our emotions take over. I cry every time I watch “The Color Purple”. That last scene is incredibly heartwarming. I do the same thing with movies like “Cinderella Man” and “The Pursuit of Happiness”. It’s not just the dramas. I laugh uncontrollably every time I watch “Trains, Planes and Automobiles” or “The Big Lebowski” or “National Lampoon’s Vacation”.

In a non-fiction account, such as a case study, it’s the element of story that adds the energy and the emotion your reader needs to feel in order to retain the facts. So that’s really the key. We want to convey facts, but with other forms of marketing, we do that in a cold and somewhat methodical way. With case studies, we do it by engaging the reader with story in order to elicit emotion.

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## Case Studies are Excellent Credibility Builders

That's the first reason case studies are so effective. The second reason is the fact that case studies are one of the most effective credibility builders out there. When evaluating products and services, we all place great importance on the experience others have had with that product or service. That's true whether we're evaluating a \$1 million piece of equipment for our employer or we're trying to decide which flat-screen TV to buy. It doesn't matter. More than facts and technical details, we want to know what other people's experience has been with that product or service because if the experience has been lousy, the technical details don't really matter.

This is why product reviews have become such an important part of ecommerce websites. If you've ever shopped online, I'm willing to bet you've read product reviews before making a purchase even though you've never met the person writing them, which goes to show that what others think is incredibly important, regardless of whether we know that person or have even met them. What really matters is that the review and opinion seems sincere and legitimate. And when it comes to product reviews on websites, they usually are.

Case studies are the ultimate credibility builders. They show potential buyers

- 1) that other people have bought and tried that product or service and
- 2) what their experience and results have been with that product or service.

It used to be that 50 or 60 years ago, buyers, for the most part, trusted the companies they were buying from. They even trusted the salespeople that were calling on their account and trusted what they said. But things have changed dramatically since then. As I mentioned earlier, there are fewer people doing the job of many. They have to make more and more buying decisions. There's also a lot at stake. Buyers today are much more jaded than they were back then, as you can imagine.

Plus, the amount of marketing and advertising being directed at both consumers and business buyers has increased exponentially. These buyers are trying to cut through all that noise and are looking for reliable information that will help



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them not only make the right buying decision, but also help them justify their decision to their bosses. Brochures can't do that. Neither can the website or salespeople or a fancy PowerPoint presentation. White papers can get close, but a real story of a company solving their challenges with that product or service does all of these things well. It educates, it validates, and helps the buyer save time in making the right decision.

In fact, in many cases, just having a few case studies available to show potential buyers, and having some of those case studies be from companies the buyers are familiar with can be enough to influence their purchasing decisions significantly.

Put yourself in the shoes of a business buyer today. On one side, you have a vendor with a good product, but no case studies. On the other side, you have a vendor with products of similar quality and a handful of case studies, some of them from companies such as General Electric, Bank of America and Ford Motor Company. Let me ask you. Who looks like a better choice, everything else being equal?

This brings up another point. Even though story and details are important, don't underestimate the power of having a few case studies on companies the buyer recognizes and respects. That alone can put your client ahead of the competition. We're going to talk more about this later in another module.

## **Case Studies are an Excellent Springboard for Getting Media Coverage**

The third reason why case studies are such powerful marketing tools is that they make it much easier for B2B companies to get media coverage. Just as case studies themselves are one of the few truly influential marketing tools out there for prospects, business and trade media are one of the last remaining influential channels out there.

Flip through any business, industry or trade publication and you're going to see story after story of companies overcoming challenges by using specific products, services, strategies or methodologies. These publications know that this is what readers want. Again, it's what we're drawn to naturally – stories of a hero overcoming obstacles and coming out of it victorious. We may not realize this consciously, but that's what's happening subconsciously.

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The whole PR industry in B2B is built around the idea of getting client stories published in the media. PR firms understand that the best way to do that is not via fancy technical details or specifications. It's through customer success stories. In fact, case studies dramatically increase the chances of a story getting picked up by a publication. Your client's product or service may be the best thing since the invention of the World Wide Web, but if there's no story of how an actual customer has used that product or service to overcome a challenge or to improve their situation, your client is going to have a really hard time getting any interest from the media.

## ■ CASE STUDIES HAVE MANY USES

The other great thing about case studies is that they have many uses. A customer story can be repurposed over and over again into a wide variety of materials and other uses. It's not just the actual case study document that has value. It's all the other things you can turn that story into.

Let me give you some examples. By the way, keep this list handy because it's not just for your own education. It can also help your clients as to what else they can do with these stories, and it will help position you as an expert and a trusted advisor, which is key to becoming a successful freelancer.

### **Marketing Materials**

Besides being a sales tool and a vehicle for getting media coverage, case studies can also be used in marketing materials to validate claims. Rather than just saying, "Product X can help you improve profitability," having a stable of case studies may enable you to say, "Our customers have been able to improve profitability by an average of 12% to 21% in less than eight months." It's much more powerful, right?

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## Newsletters

Case studies can also be used for newsletters that go out either internally or externally to prospects and customers. Most prospects and customers are less interested in the vendor's company and its products than they are in how other customers have applied those products to get results. So these stories make great fodder for newsletters.

## Lead Generation Campaigns

Case studies can also be used for lead generation campaigns. Your clients can use these case studies as offers or calls to action on an email or direct mail campaign. Here again, prospects are a lot more interested in how others have applied specific products and services to solve challenges. Everything else being equal, they'll be more interested in responding to a case study offer than to, say, a sales consultation or a brochure or simply "more information about us."

## Webinars

Webinar fodder is another way you can repurpose and reuse case study material. Whether the webinar is the offer of a lead generation campaign – which is how they're usually used, by the way – or whether they're used to help further educate prospects that are already engaged with your client, either way, case studies make excellent webinar fodder. The webinar can be centered around one or more actual case studies, or the case studies can be used to support some of the claims made in that webinar.

## White Papers

Case studies can also be used as part of a white paper's content. Depending on the type of white paper and how it's used, a case study can add depth to a white paper. Here again, it can help validate some of the claims made in the document. Sometimes they are woven into the narrative itself. Other times they're used in sidebars as mini case studies within the white paper.

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## PowerPoint Presentations

PowerPoint presentations are another great way to use case study material. Salespeople can use case study summaries to build out PowerPoint presentations or, again, to validate key points of the presentation. They can add a lot of credibility and substance to what would otherwise be a very dry presentation.

## Sales Rep Training

I have several clients that use case studies to train new salespeople on how customers are using their products and services to get results. This helps the salespeople talk more intelligently about the products, and it allows them to be more confident when talking with prospects because they know that what they're selling has actually helped others.

## Bylined Articles

Bylined articles are another great way to use case study materials. These are articles that you as a copywriter ghostwrite for a company executive or a thought leader, which are then published in business, industry or trade publications that accept articles from vendors. Here again, because we're talking about the media, it's a lot easier to get an article pitched and placed in a publication if you have one or two customer success stories you can talk about.

## Justify Buying Decisions

You can also use case study content to help prospects justify buying decisions. Here's the thing. With any major purchase, even relatively minor ones, actually, the decision makers in a company are taking a risk. They're taking a risk that the product or service won't work or that it won't deliver the promised result or the promised benefit. At stake is their job, their reputation, their pride. But when you can show them an actual story of how another customer succeeded with your client's product or service, you help overcome this fear and increase the chances that they'll take action.

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You also give them ammunition to help justify their decision to their bosses or to their peers in a buying committee, which is often a big obstacle, by the way. Your champion in that company might be sold on your client's product or service, but she may have others to answer to – other people internally she needs to sell the idea to. Case studies often do a great job of acting as an internal sales aid for that champion who now needs to sell the idea internally.

There's an old saying in the high-tech industry that no one ever got fired by choosing IBM. So in a situation where IBM was competing with, say, two or three other lesser-known vendors, the saying was that IBM, which has always been considered the gold standard in technology and also now in professional IT services, was always a safe bet. They had a name and a reputation that nobody else could beat for a long time.

The goal here is that when your client is going against other better-known vendors, or even when they're competing against the possibility of the prospect not doing anything and choosing to keep the status quo, strong case studies can help elevate your client so they can compete effectively against the big gorilla.

## Shorten Sales Cycles

Finally, case studies can be used to shorten sales cycles. Powerful case studies can help accelerate these sales cycles that your clients are engaged in when trying to sell their products and services, meaning they can help your client's prospects make decisions faster and not sit on them forever because they're afraid to make a move or they're unsure of how your client's product or service will help them improve their situation.

A key imperative for clients today is speeding up those sales cycles because if they can do that, they can increase sales while lowering their sales and marketing costs, both of which are very important.

That's a basic rundown of what case studies are, why they work and the many ways they can be used.

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## ■ HOW MUCH CAN YOU EARN AS A CASE STUDY WRITER?

But how much can you really earn as a case study writer? That's a question I get a lot from B2B copywriters. How much can you charge for a case study?

As a beginning case study writer, you should be charging in the neighborhood of \$800 to \$1,200 for an 800- to 1,200-word case study. That includes the initial prep work with your client, the interview, writing the case study and two minor sets of edits. That's a rough price range right out of the gate. By the way, we're going to go through all these stages in this program, so don't worry too much if this doesn't make too much sense right now.

As you get a few case studies under your belt, you should be comfortable charging somewhere between \$1,200 to \$2,000 for the same scope of work and the same size document.

To put it in perspective, when you're starting out, completing a case study project from beginning to end may take you a total of 10, 12 or maybe 15 hours. But after you write two or three of these, and using the system and strategies I'm going to be sharing with you in this program, you'll be able to complete a case study in five to seven hours – eight hours tops.

Your initial internal rate – and I say internal because you're not going to be charging by the hour; you're going to be charging a flat project fee – what you end up earning an hour will be the total fee divided by the total number of hours you put into the project. While this internal hourly rate may start out at say \$75 an hour or so, after you get some experience with these pieces, you should be able to drive up that internal rate to \$125, \$150, even \$200 and up per hour – sometimes even higher, especially if you end up writing several case studies for one particular client.

The more you write for one client, the more background knowledge you already have on that company and its products, so the less time you have to spend learning about what they do and about how their products work and how they help others, all while continuing to charge the same rate for the project, which therefore drives up your effective hourly rate. If you're charging the same fee, but it's taking you less and less time for every case study you write for this company, your effective hourly rate is going to go up.

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Because case studies tend to be the kind of project you're going to write a lot of for any particular client, especially if they're a mid-sized or a large company, this scenario I've just described, where you're earning anywhere from \$125 to \$200 an hour or higher, is very realistic. It's a big reason I continue to earn a six-figure income as a B2B copywriter, and it's why I think you've made the right decision in investing in this program and pursuing this lucrative project stream.

In a future module, I'm going to show you how to price these projects profitably and how to go about positioning your offer to your clients and prospects in a way that makes them want to hire you for their case study work. So don't worry too much about pricing right now, but I wanted to give you an idea of what you can expect, based on my experience and the experience of many of my colleagues in the B2B copywriting world.

## ■ KEY TERMS WE'LL USE IN THIS PROGRAM

Before we end this module, I wanted to clarify a couple of important terms we're going to be using in this program. It's important that we just take a minute and define and clarify these terms now so we can avoid confusion later. There are a couple of key terms.

### ■ ***“Client”***

When I talk about “client” in this program, I'm going to be talking about your client, the B2B company that's going to be selling products and services to customers.

### ■ ***“Customer”***

When I say “customer,” I'm referring to your client's customer – the actual buyer of the product or services.

### ■ ***“Case Study” and “Success Story”***

Two other terms I want to clarify are “case study” and “success story.” To me, they're interchangeable. A case study and a success story are the same thing. Other people, when they talk about case studies, they're talking

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about a longer version of a summarized success story. I think that's a little too much detail. To me, the terms are interchangeable, but I prefer to use the term "case study." So if you hear me say "success story," just understand that I'm going to be talking about case studies.

## ■ INTRODUCTION TO MODULE 2

That's it for **Module 1**. In the next module, we're going to be discussing the structure or sequence of a winning case study and all the elements that need to be in place in order for your case studies to be truly effective. I will see you there!