



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

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## MODULE 2

**The Winning Case Study Structure**  
Transcript



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# The Winning Case Study Structure

## ■ INTRODUCTION

Welcome to **Module 2** where we discuss the structure or sequence of a winning case study, and the elements that need to be in place in order for it to be effective.

One of the great things about case studies is that they're probably the most formulaic type of project in B2B copywriting, meaning there's a proven structure behind a good case study. It's a structure that hasn't changed much since case studies were first written.

Follow the format and your chances of ending up with a powerful case study go way up. That's great news for you because it means that if you follow the formula I'm going to describe in this module, the rest will fall into place a lot easier.

There's a reason why this formula or sequence works so well. It follows an age-old story structure that all of us are very familiar with, whether we realize it or not, or whether we're conscious of it or not. Basically, this classic structure starts out by introducing the main characters of the story. From there, conflict arises. This is where your hero – and by that I mean your client's customer – faces one or more challenges that they must deal with. The hero overcomes these challenges. In other words, she slays the dragon, thanks to your client's solution, and lives to tell the tale. Dramatic conflict is an absolute necessity in any form of storytelling and case studies are no exception.

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## ■ THE BASIC COMPONENTS OF THE SEQUENCE

With this context in mind, let me give you the basic formula or sequence. Then I'll explain each component in more detail. This is what's typically referred to as a traditional story sequence:

- 1. The Customer background**
- 2. The Challenge**
- 3. The Solution**
- 4. The Results**

Essentially, you introduce the customer first – who they are, what they do, what their market is and so forth.

From there, you introduce the challenges the customer was facing and explain the impact those challenges were having on the business or on the department or division in question.

Next, you discuss the product or service the customer used to solve this challenge or set of challenges – the solution.

You end by describing the results the customer has enjoyed from buying and implementing that product or service.

## ■ ALL THE COMPONENTS OF THE SEQUENCE

Now that you know the basic components of the sequence, let me know give you all the components of a traditional-format case study.

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1. News-like headline
  2. **The Customer background**
  3. **The Challenges**
  4. The Journey
  5. **The Solution**
  6. The Implementation
  7. **The Results and Benefits achieved**
  8. A Sidebar with summary points
  9. Pull-out quotes

These components are all in your handout for this module, so no need to rush through trying to copy them all down. Notice that I've bolded the main ones that we've already discussed and I've added some others in this list I just gave you.

Let's go ahead and discuss all of these in more detail.

## ■ A NEWS-LIKE HEADLINE

The first element of a traditional case study is a news-like headline. You need a compelling headline that communicates direct benefits that are relevant to the target audience. We'll talk more about audiences in the next module, by the way.

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I say news-like because it needs to be clear and no-nonsense. This is not the place to be cryptic or overly clever in order to try to arouse curiosity. Think of yourself as a reporter covering a story. You're trying to adopt more of an objective, straightforward approach, not a salesy tone.

Let me give you some examples of good case study headlines.

- Pratt Beverage Group Uses OmniSoft to Increase Throughput by 300%
- Bonsai Equipment Corporation Helps Banner Steel Increase Production Output by 17% in Eight Months
- Everest Financial Group Saves More Than \$730,000 by Automating Claims Processing and Strengthening Internal Controls

Notice that all these examples are very clear and straightforward. They also communicate specific benefits. The tangible figures give each headline a huge boost, which is why you should use them whenever possible. Here again, we'll talk more about that in a later module.

Also, notice that each headline is focused on only one idea. There might be a lot more to the story in terms of benefits and specific details, but notice that each of them is limited to one central benefit or idea. That's very important because introducing more than one idea or benefit will only cause confusion and dilute your message.

The only exception is when you have what I call a "cause and effect" headline. One good example of that is that last headline I listed. *"Everest Financial Group Saves More Than \$730,000 by Automating Claims Processing and Strengthening Internal Controls."* Notice that the main benefit is the money they saved. But then I explained why, and it was because they automated claims processing and they strengthened internal controls.

This approach works because you're still sticking to one idea, which in this case, again, is the money saved. All you did differently here, though, is explain the two biggest causes of that savings.

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What wouldn't work is if I tried to also introduce yet another specific benefit. Say they also improved customer retention. That's something I'm going to want to talk about in the results section of the story, but mentioning that in the headline in addition to what I already have said up there would just be too wordy and confusing.

## ■ THE CUSTOMER BACKGROUND

The next element in a traditional case study format is the customer background information. Again, this is a section where you describe the customer. We're talking three to six sentences tops that introduce the company and provide some useful background or context for the story.

Some bits of information you may want to include in this section would be:

- Where the customer is headquartered
- What they manufacture or sell or deliver
- What types of customers they target
- How long they've been around or when they were founded
- Number of employees
- Number of locations
- Main product lines or service offerings
- What makes the company and their products different

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Naturally, you can't include all of these elements in your customer background section, but depending on who the target audience is for your case study and what the story is about, pick the ones that make the most sense. You want to end up with no more than say 50 to 100 words here, so choose carefully.

## ■ THE CHALLENGES

Next, you want to introduce and expand on the key challenges the customer was facing as they relate to the products or services your client sells. This is where we introduce conflict into the story and expand on that conflict so the reader can better appreciate the impact these challenges were having on that customer.

That's key. You don't just want to rattle off a list of challenges here. You really want to pick two or three key challenges and then delve deeper into each one. You want to explain why they were important, why they were impacting the customer and to what degree they were having an impact.

By the time you're done with this section, you want to leave the reader feeling that something had to be done about these challenges. They were just too important and too meaningful to keep ignoring.

## ■ THE JOURNEY

This leads us to the next section, what my friend and colleague Steve Slaunwhite calls "the journey." Here again, we're borrowing from classic mythology and storytelling. Your hero doesn't just show up and slay that dragon. She has to find and assemble the right weapons, for example. She has to travel to faraway lands to look for that dragon.

In other words, there's a journey involved here, and that's true of any customer case study. The customer didn't just snap her fingers and a solution appeared. She had to do some research. She had to evaluate options. She had to talk to



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several of her peers to see what they thought about different courses of action. She tested some of the finalists, and she finally settled on what she thought was the best option.

This is an area most case study writers ignore or forget about altogether, but that's a mistake. Great case studies always include a bit about this journey. So make sure to include a few sentences that describe the customer's journey to find the right solution if there's any way you can get that information from them. Not only will it add more depth and credibility to the story, but it will also better position the chosen solution, which is the next section.

## ■ THE SOLUTION

You've created enough tension with the background, the challenges and the journey sections of your story that you now need it resolved. This section allows you to do this. This is where you showcase your client's product or service as the answer to the customer's challenges.

Now don't go crazy here. You want to introduce your client's product or service, but you want to be educational here. You want the narrative to flow smoothly. You don't want to interrupt that flow with a long commercial.

## ■ THE IMPLEMENTATION

So your customer has just bought a product or service, and unless it's a very simple solution, in many cases, there's some sort of implementation phase. If that's the case, it's important that you, as a writer, explain how the product or service was implemented. If you can get that information from the customer, make sure to include it here.

Keep your readers in mind. There's a certain level of skepticism involved in any purchasing decision, and this is no exception. You want to paint an accurate picture. Why? Because no implementation is perfect. And prospects know that, so showing some of your client's warts, so to speak, will make the story much more believable and compelling.

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Again, keep in mind that readers are looking for some of the details here. They don't just want to know how well it worked. They also want to know what it took to make it work, which takes us to the final section of the narrative – the results section.

## ■ THE RESULTS

This is where you now discuss in detail how well the product or service solved the customer's challenges. You want to focus on results metrics that are both specific and relevant to the target audience of the case study. Tangible and detailed figures, for instance, "increased sales by 17.5%", is obviously much better than just "increased sales."

Also, you want to put those results in their proper context by explaining why they were important to the customer. In other words, you want to explain the benefits of these results to the customer in relation to the challenges the customer was facing. Rather than just saying that the customer was "*able to increase production capacity by 12.3%*," you could add, "*because of this capacity improvement, the customer won't have to add another costly production line to the factory,*" or maybe, "*they won't have to build another plant, which means they can avoid incurring high capital expenses at a time when capital is hard to come by or business is too erratic to justify taking on that kind of risk.*"

## ■ A SIDEBAR WITH SUMMARY POINTS

The results section is the last section of the narrative, but there are two other elements you want to include in your case study. The first one is a sidebar with a summary of the story and its main points. This helps busy executives get the gist of the story without reading the whole thing. It also allows skimmers to quickly scan the story's essential elements to see if it's even worth reading.

Because of that, it's very important that you give these points some thought. You want to pick the best points of the story, and you want to write them so they're as compelling as possible and flow nicely and logically.

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## ■ PULL-OUT QUOTES

Finally, you're going to want to pick out one or two strong quotes from the customer to use as pull-out or featured quotes. As you'll see in some of the examples included in this program, pull-out quotes add visual interest to the finished document. Plus, they can also help lure in the reader who may not have been as compelled by the headline.

You won't have to worry about this until your case study draft is finished, but keep it in mind that you're going to want to find a strong and relatively short quote to use for this purpose. So as you're interviewing the customer and hear a good sound bite or two, make note of them.

That was a basic summary of the traditional case study format. This is a proven sequence and one I recommend you stick to, especially when you're starting out writing case studies.

## ■ THE "FEATURE ARTICLE" FORMAT

Once you get a few of these pieces under your belt, maybe you can begin experimenting with another format that's often called the "feature article" format.

The feature article format is actually not that much different from the traditional format. But where they really differ is in how they start out. Where the traditional format is much more structured and starts out with some basic information about the customer, the feature article format follows more of a magazine article approach. It starts out with a much more interesting and engaging lead that usually involves part of the challenge.

It then moves on to some basic information about the customer, and it then continues on with an expanded discussion about the customer's challenges. From there, it follows the traditional format almost exactly. The only exception is that instead of using the somewhat bland headers of a traditional format, meaning background, challenges, solution, results, the feature article format usually calls for more interesting subheads.

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We'll discuss all of this in more detail in another module, but for now just keep in mind that the traditional format is the easiest way to write. It's the best place to start. It's formulaic, it's very structured and it's certainly proven, so you can't go wrong with that format. It's a safe bet.

However, when you want to make the story a bit more engaging right from the start, the feature article format is a great way to go. Plus, because it uses headers a bit differently, it tends to be better suited for skimmers who want to get the gist of the story quickly.

Again, refer to the case study examples included in this program and featured in **Module 8**. You'll note the subtle but important differences between these two case study formats. Plus, getting familiar with these samples will help you make better sense of the modules that follow.

### ■ INTRODUCTION TO MODULE 3

In the next module, we're going to talk about the discovery and planning phase of your case study project, and what you'll need to gather and decide on before you interview the customer or write the first word of your draft.