WRITING CASE STUDIES:

How to Make a Great Living by Helping Clients Tell Their Stories

By Ed Gandia

MODULE 3

Discovery and Planning

Transcript

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Module 3

Discovery and Planning

Introduction

Welcome to **Module 3**. In this module, we're going to go over a very important and often-overlooked phase of a case study project – the discovery and planning phase.

It's often tempting to jump right into an interview or to take a client's existing information about their customer and just start writing, but I've learned the hard way that it pays to plan and prepare carefully for a case study. Doing so helps you avoid costly and time-consuming problems down the road, and it helps ensure that you end up with the best, most compelling narrative possible.

In this module and over the next few modules, I'm going to be referring to the process document included with this program, so if you haven't already done so, go ahead and download it and print that document and keep it in front of you. It will help you follow along better. Once you get started writing case studies, this process document will help you manage your projects better. You'll find this flowchart on pages 3-5 in Module 3 Support Materials.

So you've landed a case study project with either a new client or an existing client. You're happy and you're ready to go. But the question is where do you start? Well, if you take a look at the process document, you'll notice that there are several key pieces of information that you'll need before you get started with your interview and your draft. Let's go through those.

The Discovery Call

The first thing you're going to need to do is to have what I call a "discovery call" with your client, specifically the project owner at the client's office. By project owner, I mean the person who hired you or who's responsible for the project and seeing it through to completion. In this call, which shouldn't take more than 15 or 20 minutes, you're going to need to determine the following with the project owner.

The Purpose of the Case Study

First, what's the purpose of this case study? What's your client trying to accomplish here? Is there a specific capability they want to highlight, a big name customer they want to tout, expertise and experience in a particular industry they want to emphasize? Get as much information about this as possible. You want to make sure you fully understand what the client is trying to accomplish with this piece. Even though the case study is a routine part of a formal case study program and the project owner is just trying to meet a certain case study quota, make sure to get a better understanding of why this story is important to them and what they want to get out of it from a marketing or sales perspective.

The Target Audience

Next in this call, you need to determine who the target audience is. Who are you writing to? Are you writing to C-level executives, information technology managers, purchasing directors, facilities managers? Knowing this is critical because you wouldn't write for a CEO, for example, the same way you'd write for an information technology director. So make sure to ask who the audience will be. And if there's more than one, determine who the primary audience will be for this case study.

The Interviewee

Next, you want to identify who the interviewee is going to be. By interviewee, I mean the person you'll be interviewing at the customer's company. You want to get the name and the title of that individual and get some information about their involvement in the buying decision and the implementation of your client's product or service. If there's going to be more than one person at the customer's company you'll be talking to, get all their names.

If your client is not sure, make sure they understand that they'll want to match that person to the audience you'll be writing the case study for. Obviously, you don't want to interview, if you can help it, an executive vice president if the case study is going to be targeting human resources managers. You'd be better off interviewing human resources managers instead, obviously.

Existing Case Study Templates

Next, find out if the client already has a document template, a format or a style they typically follow. If they do, get a copy of two or three sample case studies from them just to get a better feel for what they're using already.

Also, if it's much different from either the traditional or the feature article formats we discussed in the previous module, find out if the client is open to changing their approach. One of the great things about case studies is that most of what you'll come across out there fits into one of these two popular formats we've already discussed. When it doesn't, suggesting either one of those two formats only benefits the client. I've never had a client object to going with one of these two approaches. And once they see a few of my samples, they quickly see the benefits of going this route and why they make more compelling pieces.

Case Study Length

Whether or not they have existing case study templates, make sure to at least determine if the client has a preferred document length. You don't have to get exact word counts here. You're just trying to determine if they're looking for a shorter one-page document, for example, or they want a full-blown two-page story.

Typically, you would have already found this out by now because you'll have already quoted the project and total length is definitely a factor in your price. But if you haven't yet done this, make sure to do it at this point.

The Case Study's Hook

Finally, you want to determine what the story's hook might be. By hook, I'm talking about the story's unique angle or theme. The project owner, who again is your main contact for this project, might have the answer, but if they don't, don't worry. You can still get this information a little bit later when you talk with the sales rep or after you've conducted the interview. Just make sure to ask for it now just in case the project owner already has a strong hook in mind.

Let me give you a couple of examples of powerful hooks so you can see why it's so important to have one.

A few years ago, I was working with a client on a number of case studies related to their ERP software system. ERP systems are expensive software applications that basically help track all the company's transactions. They're very complex and can run well into the million dollar range.

Most of the case studies written about customer success stories with these applications tend to focus on efficiency improvements and cost savings, which is great, but my client wanted to do something different for a case study I was about to write for him. He wanted to find a more interesting hook or angle. In our discovery call, he told me that this customer was still implementing this system, but had already achieved some great efficiencies just based on the parts they had implemented.

However, as we talked more about the customer, we realized that they were in a somewhat unique position. The company had recently been bought by a private equity group. Back then, private equity groups were buying up companies left and right, turning them around financially, and then spinning them off for a handsome profit. While we couldn't speculate how or when this customer's new owners would sell off the company, we knew that we could shift the discussion to one where we talked about how these increased efficiencies would help improve the value of the company for the new owners, which means they would be able to potentially get more for it.

Not only that, but my client had overheard that until the new system was completely implemented, meaning the system they sold to this company, and it was running smoothly for a few months, the customer would continue to run the old system in parallel.

But here's the catch. The previous owners of that company still retained the software license for that old system, and because of that, they had negotiated a rental fee with these new owners to use the system until they were ready to switch over to my client's system. This meant that the faster this customer could implement my client's system, the less they would have to pay out in monthly system rental fees to the previous owners. It also meant less value being drained out of the company, which would increase the value of the company when it was eventually put up for sale.

I realize that this sounds a bit complex, and I'm only giving you a summary of the story, which probably doesn't help, but my point here is that instead of using the same old tired hook of efficiency improvements, cost reduction, etc., we focused more the discussion around how these efficiency improvements and a fast implementation would enable this new owner to flip that company faster and more profitably.

Our interview with the customer a few days later confirmed that we were definitely on the right path. The customer was okay with us using this hook, and we were able to get some great information from them that backed this new and interesting angle.

There are cases where the story you'll be writing simply lacks an interesting hook either because nothing really that interesting happened, which is rare, or because the customer is not very willing to give out juicy details about their experience. We'll talk more about this later, but just know that if you run into that, you'll need to make up for it somehow. Probably the best way to do that is to have an impressive company name to showcase. You could have a very plain story without much in the way of interesting information or specific results, but if the customer's name carries a lot of weight, that can usually make up for the lack of more and interesting information.

Say the customer is Dupont or Walmart or General Motors or AT&T. For many clients, just being able to say that they have one of those companies as customers and have a very basic case study about that customer is often good enough. What I'm saying here is that in every case study you'll need either a strong hook or an impressive customer name, or both if you can get them.

Sales Rep or Sales Management Buy-In

So you've had your discovery call and you've hopefully gathered key pieces of information, including your client's objective for the case study, the target audience, any format requirements or restrictions, and one or two hook ideas you can start playing with.

The next step is to get buy-in from the sales rep or the sales manager. Here's the thing. In most organizations, salespeople are very protective of their accounts, and they have good reason to be. They work very to land a deal or to maintain that account, so they tend to be very suspicious of someone who wants to come in and take up their customer's time to ask them a bunch of questions. Because of that, it's important that your champion, the project owner, have buy-in either from the rep handling that customer or from that rep's boss to write a case study on that customer.

It's true that salespeople or sales managers don't technically own these customers. The business is actually owned by your client and not by any specific individual within the company. But I found that it pays to work with the sales team on these projects rather than to fight them. This is one of those steps in the process that you usually can't do much about. Your project owner will have to do most of the work to get this kind of support. But you can certainly help by asking that they consider getting that buy-in.

You can also help by arming the project owner with information that will make it easier for the sales team to agree to be on your side. There are two big ways the sales rep will win big by having a case study written about their customer:

1. By having the story documented it will make it easier for them to sell additional business in that customer's industry or sector. The case study will be a very helpful sales tool when going after prospects in that market.

2. By having the story documented, it will drastically limit the number of reference calls that customers get. It's common in many industries, especially when expensive products and services are being sold, to have prospects request to speak with existing customers of your client just so they can get a better idea of how the product or service is working for those other customers.

Sales reps know that every time they have to ask one of their existing customers to take such a reference call, they're getting a favor from that customer. And in many cases, this is a favor they may not know how to repay. So having a document that limits the number of reference call requests their customers get is often a welcome relief to a sales rep who feels she has pretty much used all her favors with her customers.

There's actually a third reason the sales rep will benefit by having the case study or the story documented, and that's the fact that a case study on one of their customers is an opportunity to give the individual at the customer's company a chance to be portrayed as a thought leader in their field or their industry. Let's face it – we live in a world where getting good exposure in your industry can lead to lucrative job offers and career-building opportunities, and by this individual starring in your client's story, he's going to be exposed to many of his peers. He'll be seen as a hero and as a smart decision maker. And if the story is picked up by the media, his name and the story itself will be exposed to potentially thousands of people in the industry. That's not a bad deal for him or her.

There's yet another reason why you're going to want buy-in from the sales rep or the sales team. You'll need their insights in a pre-interview call a little further in this process. If you're working with a client that has sales reps in charge of maintaining these accounts or customers, again, ask your champion, your project owner, to get sales rep buy-in. It's an important piece of this case study puzzle.

Get Personal Commitment from Customer (the Interviewee)

The next step in the process is another action that the project owner will need to take on. That's to contact the individual in the customer's company who would be the ideal candidate to interview for two things. One is personal commitment – that they're willing to be interviewed for the story. The other is to get preapproval on doing the story with you and your client.

This person that I'm talking about is the person that your client has identified earlier based on the target audience for the case study and the relationship your client has with the different individuals in that organization, and maybe even some of the suggestions from the sales rep in charge of that account.

In some cases, you'll have two or three people who would be good interviewees for this story. And as we'll discuss in another module, the number of people you'll need to interview is something you'll want to have up front before you quote the project. But at this stage, you want to have your client go ahead and contact that individual or those individuals to get preapproval on volunteering their time to get the story written and approved.

Here again, these are two steps I see many clients skip and that's a huge mistake. The story might be wonderful, but if the customer is unwilling to tell it or to help you get it approved internally with their company, your client will just waste a lot of time, money and energy. So it's important to get that commitment now before you go any further. Again, it's something the project owner will have to do or will have to assign someone to do it. This is pretty much out of your hands, but as a professional, you want to suggest and remind the project owner of this critical step.

There is something you can do to help your client increase the chances that the customer will agree to do this. That is, you can provide the project owner with an FAQ document – a "frequently asked questions" document. This is the document that will hopefully address many of the most common objections and misconceptions customers have regarding case studies. I've included a sample FAQ document with this program, and I encourage you to use it when you think it will help your client.

Obviously, how your client chooses to contact their customer about the potential case study they want to get written here is up to them. But when asked, I always suggest that they have the sales rep contact the client and have him or her fully armed with this FAQ document. That's yet another reason to get the sales rep on your side.

Of course, if the project owner is comfortable doing this themselves or they already have a relationship with a contact at the customer's company, then they can go ahead and reach out to that individual on their own. Just make sure they focus this request on one or more of the following benefits the customer will get by agreeing to participate in the case study.

1. Great exposure that can help them in their own career, as we discussed a few minutes ago.

2. Fewer reference calls now that their story is documented and easier to pass around to prospects.

There's actually a third benefit that your client should consider using when talking to the customer about the interview. When the potential interviewee has a document in her hands she can share with her boss or with the company's executives that shows how one of her projects helped the company or the division or the department achieve an important goal, that's a great thing. It's going to improve their career. It's going to position them as a thought leader and as someone who's out to help the company achieve its goals.

In some cases, your client may also want to consider offering a financial incentive for customers to participate in a case study. Not a personal financial incentive, but one that benefits the customer's company. For instance, I have a client who offers some hard-to-get-to customers a $2,500 annual service credit if they agree to participate in a case study interview. That may not seem like a lot of money, but many companies are encouraging employees to find ways to save costs, and if your client's contact now has something tangible, a savings opportunity they can present to their bosses, the chances of them agreeing to do a case study with you go up quite a bit.

I had another client a few years ago who would even include a discount line item in their purchase contracts with their customers for agreeing to do a case study with them. It was built into the actual purchase contract, and they went ahead and indicated how much that was worth to them in terms of a discount, an actual dollar discount on the price of the product purchase. It was very effective.

Get Preapproval from Customer's Legal and/or PR Department

The next step in the process once you have the customer's approval to move forward with the interview is to ask them to get preapproval from their executive team or their legal department or maybe their public relations or PR team. This is yet another step many clients skip, but it's one of the most critical ones. The reason is I've seen many case studies written only to be turned down at the last minute by the customer because their legal team won't approve it or because the company's president doesn't want the story to be published.

Here again, this is something your client will have to do on their own, but make sure they go ahead and do it. And if they think it will help, ask them to use that FAQ document I'm providing here as a guide to address some potential misconceptions or questions.

If the idea of doing a case study is rejected internally by another department or by upper management at the customer's company, all is not lost. If that happens, suggest to your client that they have a fallback position ready to suggest to the customer. In fact, I'm going to give you two fallback positions to offer.

One is to see if the customer will agree to at least do an unnamed case study. An unnamed case study is one where the customer's company name is not used. Instead of saying "Home Depot," for example, you would say "a major home improvement retailer." Although not as powerful as having the actual company name in the story, if the story is really good, it will still be effective and may still be worth writing. So see if they'll agree to that.

I can tell you, by the way, that this is very common with Fortune 500 companies. Many of these companies don't want information about them published in this manner, especially when it talks about problems they were having or when it discusses specific products or services it bought to solve key strategic challenges. If your client's product or service is giving this company some sort of edge over their competitors, they sometimes don't want anyone to know, so that's another challenge you may encounter for the customer agreeing to use their name in the story.

If they're still not willing to participate even in an unnamed case study, there's yet another option to suggest. That's a "campfire story." A campfire story is simply an internal story your client would use internally for training purposes or when talking with prospects. You'd basically interview the customer just like you would when writing a full-blown case study, but rather than drafting a story, you would create a one-age or maybe even half -page storyboard or a list of bullet points that just summarize the before and after story.

The information would never be published outside of the company or given to anyone outside of your client's company, but sales management could use that information internally to train a new sales rep on how the company's products or services helps its customers. It could be used in sales meetings to show the sales team how one of their customers successfully implemented the product to solve a key challenge. And it could be potentially used in conversations with prospects to explain how others have used the product or service to achieve a certain result.

Schedule Interview with Customer

Obviously, if the customer doesn't approve any of these scenarios, you're at a dead end. There's not much more you can suggest. But if they approve your moving forward with the story, your next step is to go ahead and ask your client to schedule a phone interview with the customer. In some cases, your client will just ask you to contact the customer directly and schedule that call. I've included some sample emails and phone scripts you can use when that happens.

However, my suggestion would be that if this is a new client you're writing for, try to at least have the project owner or someone from the client's company be on the call with you. That can be very helpful since you may still be learning about the client's products, services and target markets. If that's not possible, don't worry, but make sure you spend extra time before that call brushing up on your client's products, the customer's company, their industry, and all your notes from your interviews with the project owner and the sales rep in charge of that account, which, by the way, is the next step in the process.

By the way, the customer interview call shouldn't take more than 30 to 45 minutes. Make sure that whoever is scheduling that call lets the customer know about the time you'll need from them for that interview.

Have Back-Story Call with Client

Okay, so you've scheduled that interview with the customer and in the meantime you want to schedule another call, which needs to happen before that customer interview call. That call is called the "back-story" call.

Early in this process you gathered some basic information from your client about this customer and their story. But now that you're about to interview the customer, you'll want to get a little bit more information from your client, and if possible, also from either the sales rep, the account manager or other individual in the company who knows their story well.

Essentially, what you want to do here is to get even more familiar with the story as the client sees it before you interview the customer. That way, you know what to expect, what to ask, what to avoid and how much to probe. This doesn't have to be a detailed call – 15 or 20 minutes, maybe 30 minutes tops will do.

Here's what you're going to want to ask them.

1. What key challenge or challenges was this customer trying to solve?
2. Why did they choose you?
3. How well did the implementation go?
4. What results have they enjoyed as a result of buying your product or service?
5. When we first discussed this story, you mentioned that a hook we may want to bring to the surface is X. Do you still agree? Any other angles we should explore or focus on during the interview with the customer?

Obviously, if you still don't have a hook part of this call, you'll want to have one or two ideas by the end of this call.

Research Customer and Product/Service Purchased

At this point, you now have enough initial insight about the story to ask some intelligent questions of the customer. But there's something else you need to do before you draft those questions. That is to read about the customer and their company. Go to their website if they have one, see what products or services they provide, what markets they sell to. Read about their history and their executives or founders. This background information will help you craft smart questions and have an intelligent conversation with the customer when you do speak to them. They'll appreciate the time you took to prepare for that call.

Customize and Send Questionnaire to Customer (the Interviewee)

The next step in the discovery and planning process is to create a customized questionnaire based on what you now know about the customer and their story. I'm including a sample generic questionnaire in this program that you can use as the basis for the customized set of questions. Keep in mind that the questions in this document, though, are generic, so you're going to want to tailor them to the specific customer and the specific story you're working with. But they'll at least give you an idea of what you'll want to ask and in what order.

Once you've customized that questionnaire, email it to either the project owner in your client's company or to the person you'll be interviewing at the customer's organization. Again, it all depends on how the project owner wants you to handle the project here. In many cases, they will have already introduced you via email to the customer, in which case you can go ahead and email it to them directly. Make sure to copy your client in the email.

But if they're trying to keep a layer of control over the process and would rather all communications and requests go through them, then by all means send it to the project owner and ask him or her to forward it to the customer. Just make sure that the customer understands that they don't have to fill the document out. You're only sending the questions so they can have an idea of what you'll be asking them during the interview.

By the way, one benefit of sending these questions out to the customer prior to the interview is that it will help the customer dig up any actual metrics or detailed information they don't have memorized. That way, during the interview they can give you detailed answers to your questions.

Conduct the Interview with Customer

Finally, you want to decide with your client ahead of time how you're going to handle the interview. There are a couple of options. One is you could conduct the interview on your own over the phone. You have the questions already, so you know what to ask. You've read up on the customer, their company, the industry and so forth, so you can certainly take this on. However, if your client does want you to do this on your own, just make sure that they introduce you to the customer via email prior to that interview and notify the customer that you'll be calling directly to conduct the interview. That way, the customer knows to expect your call.

If your client would rather be on the call with you, that's fine too, but just make sure ahead of time to agree on a simple set of protocols and roles for each of you. By that I mean:

- Who's going to be calling whom?
- What type of phone line will you be using?
- Will you be using a conference call line or will your client start a three-way call with you and the customer?
- Who will set up the conference call line?
- Who's going to get that information out to everybody?
- Who will start off the conversation?
- Who will ask the questions?
- If you'll be the one asking the questions, how will the hand-off be handled?
- Who will close off the call?

Those sorts of things are very important. It shouldn't take more than a couple of minutes to set all that straight, but make sure to determine those things before you hop on the call with the customer.

I've been in pretty much every one of these scenarios, and while there are pros and cons to each, here's what I would recommend you do if you have a choice or if you want to recommend an approach to your client.

If it's a new client of yours or even if it's a longstanding client, but this is your first time writing a case study for them, ask the client to be on the call. They can make the introduction and then just close off the call after you've asked all the questions. Also, you can suggest they ask follow-up questions or jump in if they want to expand on a key point they feel is important and might belong in the story. The reason I like this approach is that it helps the client get comfortable with your process and it helps you settle in a little better.

In some cases, I've had clients who insist on conducting every interview themselves and just having me in the background taking notes and asking follow-up questions or asking questions they may have missed. That's fine too. My only two concerns are

1) getting all the information I need and

2) keeping my client happy and comfortable with the process.

If they prefer to conduct and lead the interview, that's fine with me, as long as we agree on what questions will be asked and as long as they understand that it's important to ask these questions in a certain order.

Introduction to Module 4

We'll talk more about other interview scenarios in the next module, where we'll focus exclusively on the interview process and how to conduct an interview that yields great information and insights. *I'll see you there!*