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

By Ed Gandia

MODULE 5

Writing Your Case Study Draft

Transcript

AWAI

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Published by:

American Writers & Artists Inc.

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Module 5

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Introduction

Welcome to **Module 5 – *Writing Your Case Study***. As the title implies, this is the point in the case study creation process where you sit down and actually write your case study. Your goal here is to craft the best draft of the case study you possibly can and to do so as efficiently as possible so you can submit it with confidence to the client, and of course, do so on time.

Getting Organized

I realize that I've asked you to do quite a bit of prep work, possibly more prep work than you had anticipated before you started this program. But there's a reason for that. By the time you get to actually writing your case study, you want to be at a point where you have all the information you need and you're familiar enough with the story and all of its components that the writing process runs smoothly.

The last thing you want is to be at this point and feel as though you're missing key pieces of information, or you're just not comfortable enough with the story to make it flow well. That's going to make the writing process a real chore, and it's going to raise your level of anxiety, which will suppress your creative capacity.

So make sure to take time to do a few things.

- First, have that initial discovery call with your client.
- Also get buy-in from the sales rep or sales manager.
- Have the client get commitment from the customer you're going to interview.
- Have the customer get preapproval from their legal, PR or senior executive team.
- Have a back-story call with your client.
- Customize your questionnaire to what you know about the customer and their story.
- Send that questionnaire to the customer ahead of time so they can be better prepared for the interview.
- Finally, ask follow-up questions during the interview that help you reveal interesting details.

Gathering Your Information

If you've done all this, which we've discussed here in the last couple of modules, you will now have everything you need to start the writing process. So before you do anything else, you need to gather and assemble all this information in one spot. That includes:

- Your notes from your calls with the client
- Your notes from your interview with the actual customer

- The audio recording from the phone interview with the customer
- The transcript of that audio interview
- Information you've printed from the customer's website
- Information the customer may have sent you directly with specific results on the product or service they bought and implemented
- A brochure or product brief from your client on the product or service the customer purchased and implemented
- Any previous case studies from your client if they're trying to stick to a certain format or layout that you need to keep in mind and follow

You don't have to spread all this out all over your desk, but just keep that information handy. What works for me is I create a different manila folder for every project I work on. I label it with my client's name and the name of the project, and I stick every piece of information related to that project in the folder. It really helps me keep things together.

I then have a filing cabinet with hanging folders that are sorted by client, and I file all manila folders on current and active projects in that client's folder. As I close out a project, I then move those manila folders to a filing box. That way, my filing cabinet stays clean and manageable.

What tends to happen at this point is that you have so much information about this story that the project can easily become overwhelming. The trick is to have a system in place that allows you to organize the information in a logical fashion and ensures that you don't leave out any important details.

Step-by-Step System for the Writing Process

The system I use is the one I recommend you start with and it goes like this:

Your Notes

First, start with your notes from your calls with your client and from your interview with the customer. These shouldn't be detailed notes, especially the interview notes because, again, you were recording the call and focusing more on listening to the customer than on taking detailed notes. All these notes should be fairly easy to digest and they'll do the best job of highlighting the story's main points. That's why we're going to use these to get started.

Mind Mapping

Next, take out a blank sheet of paper. We're going to go through a process called mind mapping. By the way, if you have oversized paper, use that because mind mapping usually takes up a little bit more room than a standard size sheet of paper.

Mind mapping sounds fancy, but all it is, is a process of organizing information in a visual format. Like traditional outlining, mind mapping is very forgiving in that it allows you to add ideas and details very easily as you come across them.

When it comes to mind mapping, I found that the best way to organize information, regardless of what method you're using, is to start out with the biggest, broadest points and then move on to the more detailed information. Let's say we're going to be using the traditional format for the story. That means we're going to have a customer background section, a challenges section, a solutions section and a results section. Go ahead and create a bubble for each of those main sections on that blank sheet of paper. That's how we're going to start the mind map.

Now that you have your main bubbles already in your mind map, start going through each one of your call and interview notes and add branches to each one of those main bubbles with key points, examples and information you'll probably want to include in the story.

As you do this, keep the story's hook in mind. In fact, I recommend you write that hook at the top of your mind map page. It's going to help keep your mind mapping focused and on track. If you haven't yet decided on a hook for the story, don't worry. You'll have another chance to do this once you're done with your mind mapping.

Organizing Your Transcript

Next, you're going to open up your interview transcript and organize it somewhat. This basically involves reading through that transcript and labeling the basic sections of the story. This is one reason why you wanted to keep that interview so focused and in the order of how the story will be written. That way, when you go through that transcript, you can easily find the main sections of the story: company background, challenges, etc.

Again, label each of those key sections in the transcript with large bold headers. Specifically, you want to label the company background area, the challenges area, the journey, the solution, the implementation discussion and the results area. If you remember back from an earlier module, those are the key elements you're going to want to have in the finished piece in terms of your actual narrative.

As you do this, go ahead and cut and paste text or delete text as needed to keep it in this order. You'll definitely need to do that if the interviewee got off track a bit or the discussion took a different turn at a certain point. The idea is, by the time you're done with this process, you want to end up with a document that's organized exactly as the finished case study will be organized.

Once your transcript is organize properly and the main case study sections are labeled, start going through each section of the transcript and inserting subheadings that describe some of the detail under each of those sections.

Let me give you an example. Say you're reading through the challenges discussion in the transcript and the customer talked about three specific challenges they were having.

- **CHALLENGE #1:**
  Was that factory floor workers were spending too much time filling out paperwork at the end of their shift.

- **CHALLENGE #2:**
  Was more about their inability to take appropriate action on a production line when they saw a problem occurring.

- **CHALLENGE #3:**
  Was about the high number of product defects the company was experiencing.

What you want to do is find where the customer was talking about each of those areas and label them with a subheading that appropriately described that subsection within the challenges area. So maybe label the section about their paperwork dilemma as "workers spending too much time on paperwork." Then you label the other section "inability to act on production line problems." And the third section, you would probably label "high number of product defects."

Going through the transcript this way does two very important things. First, by reading the transcript, it forces you to relive that interview and really absorb that story and all of its details. That alone will help you write a better draft because you'll have internalized the full story by that point.

The second reason is that by the time you're done organizing and labeling all the key sections of the transcript, you'll have a great document to pull information from, and you'll have an easy way to find the information in that document. If the key sections weren't labeled, it would be very difficult to work with that transcript, and you probably wouldn't even use it.

Now that the transcript is organized and labeled, go back to your mind map and add any key points from the transcript to the mind map that weren't in your notes.

Finally, do the same thing with any other pieces of information you may have gotten from your client or from the customer. Add that information to the mind map where it belongs.

By the way, as you add information to your mind map, it helps to also indicate where you got the information from. That way, when it comes time to write, you'll be able to quickly find the document where the detailed information resides because, again, a mind map is only going to have a few key words for every bubble or every branch. You're not going to have the full text there, so when it comes time to actually do your drafting, you're going to want to know where you can find more information about those key words or those main points.

I do this by giving every document and every set of notes I have in my project file a specific letter. If the interview transcript is Document C, for example, and there's an important comment or detail on Page 3 of that document, when I write it down in my mind map, I write that comment in the mind map along with the code C-3, meaning I got it from Document C, Page 3.

Storyboard

So you've gone through all the documents in your project folder and you've scanned and read each in order to find key points and key information to put on your mind map. The mind map has given you a framework to keep that information organized. But now you need to pare it down and get it in a format that will allow you to write the paper efficiently. To do that, you're going to storyboard your case study.

It sounds fancy, but all storyboarding is, is a detailed yet informal outline that helps you visualize how the story is going to come together. It's more detailed than a basic outline, but for a case study, it won't be any longer than one or two pages.

Storyboards are typically used by film producers to pre-visualize a motion picture, an animation or a TV commercial. It involves a series of illustrations or images displayed in a sequence so the teams working on the project can more easily see how the pieces are going to flow. Obviously, we're not putting together a movie or a TV commercial here, but we're still crafting a story, and I've found that it's sometimes difficult to go straight from a mind map to a rough draft, so I use a story board to help bridge that gap and to help me smooth out and refine the story a bit better.

I like it more than your traditional outlines because outlines typically have only maybe one, two or three key words per point, and I want a little bit more than that. I want a little bit more detail, so I call my outline a "storyboard" because essentially that's what it is.

All you need to do to create your storyboard is use your mind map as your guide, and in a new document in your word processing program, start typing out each story element in your own words. Don't worry about creating narrative at this point, and don't worry about making it sound perfect. You want to move quickly through this process. That's key to making it work. Start with a company background section and then move on to the challenges section and so on. Make sure to label each of these sections with a bold subhead in your storyboard. That way, you can quickly see where each of them starts and ends.

By the way, I'm including a sample storyboard in this program so you can see what you're aiming for.

Creating the storyboard is the point where you want to start cutting out story elements and details that are either repetitive or just not important enough to make it to the draft. Your mind map was the place to put it all, unencumbered by space or time limitations, and that's good, but now with your storyboard you have to be more selective.

That brings up an important point. You need to remember that you're trying to create a narrative that will end up being, again, no more than about 800 to 1,200 words long, depending on what you agreed with your client and what their expectations are, of course. But my point is that there's a limitation here. You have only so much room to work with, yet you probably have a 15-page interview transcript, several pages of notes, a few other documents that your client has supplied you with. You can't possibly fit all this in.

Your job is to tell the story in a couple of pages, so choose carefully. Pick only the points and details that support your hook, and leave out minor points and details that either don't add to the story or maybe aren't as important as some of the other elements. As the writer, it's going to be up to you to make those decisions, but to guide you, use the hook that you and your client agreed to as well as any points they may have emphasized during the discovery and planning phase.

Once you have your storyboard written, take a look at it and ask yourself if you can visualize how the story is going to read. Can you see how it will flow? Does it make sense? Does it feel compelling or is it too complex? If it does, or if it's just not feeling right to you, work on it and massage it until you have something that flows nicely.

One test I use is I start reading it out loud. I ask myself, "This story told this way, kind of in an informal way, does it make sense? Is it logical? Does it flow? Is it confusing? Why is it confusing?" That helps me see where potential problems might be.

From there, you might consider sending it to your client for review and approval. This is optional, though. But it can be a good idea to do this if

a) the customer introduced some important new information during the interview that your client hadn't even mentioned during the discovery and planning phase, or

b) there seems to be some disagreement internally within your client's company as to what should be in the story, or

c) this is your first case study project for this client or this is a new client altogether, so you want to make sure that what you're working on is on target with their expectations.

Just be careful how you handle this, though. You don't want to open the door at this point to new ideas or big changes. This should merely be a checkpoint to make, if anything, very minor adjustments or to get the client's go-ahead before you start writing.

Make sure they understand that this is merely an informal outline and not any sort of finished piece. The language is a bit more casual than normal and it's that way on purpose, so make sure that they understand that.

Writing Your Draft

Okay, so you've created a storyboard with all the story's key points. Depending on the situation, you've gotten approval from the client to move forward. Now it's time to finally write your draft. As I mentioned earlier, the whole point of all this prep work and all these steps is to be as prepared as possible when it comes time to write your draft. It's going to make the writing go faster and it will be much more enjoyable. Plus, you'll end up with a much stronger piece.

Sure, you could skip some of these steps we've gone over, and as you get more experience writing case studies, your approach may evolve. That's normal. But for now, stick with this system. It works, it's proven and I'm telling you it will increase your chances of success.

Your goal at this point is to write your first draft as quickly as possible all in one day, taking breaks, of course, but not breaking out the process into more than one day. When you're starting out, writing that draft could take as long as six, seven, eight hours or so, but as you do a few of these, I can assure you you're going to be able to knock out a rough draft in half a day or less.

There are a couple of ways to start your draft. The first one is to use your storyboard as your guide and starting typing directly on that document using your own memory and the story details, as well as your notes and your transcript as additional sources of fodder. I can tell you that if you've done everything I've described so far in this program, once you start typing and using that storyboard as a guide, you're going to get in the flow and the words will start coming out. So don't think too much about it. You've built enough momentum with the story by now that you need to just start writing, even if your first sentences aren't all that great.

If you have writer's block, I've found that just starting out with something easy, such as the company background section, for example, that's a good way to get going and into that flow.

The other way you can start your draft is to open up your transcript document, treat it as a rough draft and then just edit down from there. This approach can work really well if the story is relatively simple, meaning there aren't too many facets to the story, or if the customer you interviewed was very concise and did a really good job of staying on track during the interview. Either way, your transcript is going to be much too long, so you're going to have to edit it down.

But I find that if the story came out very nicely in the transcript, it's often easier to edit something that's already on paper than it is to start writing from scratch.

Use those guidelines to determine how to best start your writing, and, of course, go with what feels better to you. These days, I work very hard on keeping my customer interviews short and focused. That tends to yield a transcript that can be edited fairly easily. There's still a lot of work to be done, don't get me wrong, but for me it's easier to start with that and then edit it down than it is to create it from the beginning. But again, if your transcript is just way too long or the story is too complex, starting with a storyboard is usually the best way to go.

Writing Guidelines for Each Section of the Case Study

At this point, let's go through each section of the finished case study and I'll give you some suggestions and some writing guidelines to keep in mind.

Company Background

I like to go to the customer's website and look at recent press releases and go to the end of that press release and pull information out of their "about us" boilerplate. This is where they talk about their company and what they do and who they do it for. I find that in many cases, this is great copy that I can very easily edit.

Another great place to go to is the "about us" section of their website. You want to end up with three to six sentences. That's usually enough for this section, so don't go overboard.

The Lead

Next is the lead. If you're using the feature article format, you're going to want to start out the narrative with an engaging lead. When using this format, I tend to leave this section for later when an idea strikes, but other writers prefer to start out with the lead. It doesn't matter how you do it. Whichever way you prefer, just make sure that you focus on writing it in a way that brings the reader right into the story.

I've found that it helps to set it aside for a day or so and keep revisiting it fresh. That's when the ideas for your lead and how you're going to start it will come to you.

The Challenges

In regard to your challenges section, customers don't want their challenges to be highlighted. They don't want people to feel that they didn't know what they were doing. So keep the discussion focused on challenges directly related to your client's product or service.

In some cases, you may want to minimize the impact these challenges were having. I know that contradicts some of what I've said before. You're just going to have to use your own best judgment. This is where some preplanning with your client and having those discussions during your discovery and planning phase will come in handy.

Sure, you want to highlight these challenges, you want to talk about the impacts they were having, but you don't want to portray this customer as having so many difficulties that people might wonder, "Gosh, did they know what they were doing?"

Also, in the challenges section, I like to focus on no more than three challenges or so. I tie them together with transitions so they flow. And I like using subheads within this section to help skimmers get the gist of the specific challenges and to break up the narrative a little bit. I won't just label the section "Challenges." I'll also use subheadings within that section to indicate two or three main challenges they were having.

The Journey

For the journey, I like to include this section in the solution section. I find that labeling it as “the journey” can be confusing to readers. Plus, when you think about it, looking for a solution and arriving at the right solution, that kind of all fits together anyway.

The Solution

The solution section should definitely be labeled as “Solution.” It is its own section. Explain what they bought and describe what it is briefly. Use a quote from the customer to say why it was their best choice and then include a few sentences about how the product was implemented. Just be honest here.

Again, as I’ve mentioned in other modules, show the warts if there are any, but also explain how these issues in the implementation phase were resolved and what your client did to help the implementation go as smoothly as possible. Readers want an accurate portrayal of what happened. They know things rarely go smoothly all the way through.

The Results

From there, move on the discussion to the results the customer has achieved and the benefits they’ve enjoyed as a result.

Something I like to do is take the two or three challenges I talked about in the challenges section, and use those as guides for the results discussion. If the first challenge I listed was about how the factory floor workers were spending too much time filling out paperwork at the end of their shift, I will start out the results section talking about how that’s been resolved. I’ll provide measurable results information if possible, and explain what solving that problem has meant to the customer.

The Ending

As far as the ending of the case study, you have a few choices. One, you could end with a strong quote that makes a bold statement or summarizes how the customer feels about their decision. I like doing this whenever possible.

Another approach is to talk about future plans. Where are they going with this? Where do they go from there? Will they expand usage? What other benefits do they expect in the future?

A third alternative would be to summarize the key points of the story at the end. I'll be honest with you. This is my least favorite approach. I rarely use it. In my opinion, it doesn't work as well as it sounds. It's a weak way to end the story. I prefer to use a strong quote that makes a bold statement or summarizes how the customer feels about their decision overall and about the whole experience, or talk about future plans and where they're going to go from here.

The Headline

In terms of the headline for the case study, it's very important to have a powerful headline. Use a story's hook as your guide. As I mentioned in a previous module, keep it to one central idea. It should be a news-like headline that grabs the reader and makes them say, "Wow, this sounds like an interesting story. I want to read this."

You can wait until you have your draft finished to write it, which is what I typically do. Or you can do it early in the process as you're storyboarding, for example.

The Sidebar

Finally, the sidebar area. Wait until you finish drafting to write those bullet points. Then take the three biggest points in the challenges area and rewrite them as one-sentence bullets or as action phrases. Write one bullet for the solution and then, again, three or four bullets that best summarize the results the customer has enjoyed.

And as I mentioned earlier, usually tie it to the specific challenges they were having. That way, you have a closed loop approach.

Not all clients will have or want a section for bullets, but a sidebar with summary bullets really helps summarize the story for a skimmer. You'll see an example of all this in the last module where I analyze some actual case studies, some of which include a sidebar with bulleted summaries.

Editorial and Stylistic Guidelines

I want to talk about a few editorial and stylistic guidelines.

First, in term of customer quotes, quotes are extremely important because they help support your statements and claims. They also add depth and credibility to the story and they help make the narrative a lot more interesting.

But don't go overboard. I find that three to maybe eight direct customer quotes in an average two-page case study are plenty. I tend to go on the higher end of that range. I'll usually have somewhere between six and eight total quotes, but that's just my preference. If you want to go on the lower end of that, that's fine. I'd say at a minimum three to four. Make sure to space them out evenly throughout the case study so they're not all bunched together.

There are several ways to use customer quotes. Here are **three** of them:

1. You can use them to support a statement or an idea.

2. You can use them to introduce information directly.

3. You can use them to expand on something you've already mentioned or talked about.

One thing I suggest you do is to go online and print a few feature articles from *Business Week*, *Forbes* or *The Wall Street Journal*, and you'll see stylistically how to incorporate them into the story. Of course, look at the samples we've included and talked about in **Module 8** of this program to get some ideas as well.

Whatever you do, don't be too mechanical with quotes. I've read case studies where the writer will have a statement and then a quote, a statement and then a customer quote, and it goes like that throughout the story. It makes the story sound too abrupt. It just doesn't feel compelling and flow through nicely.

As far as customer quotes, it's okay to rephrase what a customer has said. Don't be shy about doing that. Keep the same idea, but polish what they say when necessary. It's perfectly acceptable to do this.

Also, it's okay to join two separate quotes into one. I do this quite a bit. If the customer has talked about one specific point here, and then they got distracted and started talking about something else, and then they went back to that original point and added more information, I'll typically combine those into one quote. The customer is usually okay with this. I've never had a problem with it. In fact, they'll even appreciate you're making them sound even more polished.

In terms of how to use the individual's name you're interviewing, I typically indicate the person's full name and title after their first quote, and then I'll just revert to their last name throughout the story.

From a readability standpoint, vary your paragraph length and use plenty of subheads. It's going to break up the copy. It's going to make it read easier, and again, it's going to help skimmers get the basic information they want without having to read the full story.

For headers and subheads, if you're using a traditional style, use the traditional headers: Company Background, Challenges, Solution, Results. But then consider adding subheads under those sections to help skimmers and to break up the copy.

If you're using the feature article format, dive right into your lead and then use subheads to help skimmers and to draw readers into the story.

A few other stylistic considerations – first keep it evergreen by avoiding dates. If you're talking about when the customer purchased that piece of equipment, try not to use the date unless your client has a specific reason for wanting to mention that. It's going to date the story very, very quickly.

When discussing numerical results, consider using percentage improvements rather than whole numbers. This will help keep results in perspective for your readers and not have someone balk because the figures are not in the range they're accustomed to.

For example, saying that someone saved $47,000 a year in overtime costs may not mean much to a larger company. But if that figure represented 73% of that particular customer's total annual overtime costs, that's going to be an impressive percentage improvement no matter how much another customer may spend over time or how big they are.

The Editing Process

Finally, I wanted to give you some tips on the editing process. I have a very specific process that I follow I've refined over the years. It works very well for me and I wanted to share it with you.

First, wait at least one day to do any editing. You'll be able to look at the draft with a fresh perspective. My first drafts tend to be too long. I'm the kind of writer who writes too much initially and would rather pare it down in the editing phase. Many times I'll end up with 1,500 to 1,800 words in my first draft, when the final draft will need to be somewhere between 1,000 and 1,200. But that's okay. I like to have, again, too much and then cut it back.

This editing round should be substantial and you should end up with almost a final draft by the time you're done.

From there, wait at least another day or two and then do your polishing. You're refining at this point, so you shouldn't really have major edits. This should be a pretty quick task. But it's important that you wait that day or two to give that draft a fresh look.

From there, send it to a proofreader directly. As soon as I'm done with my polishing, I don't wait another day. I immediately send it to my proofreader. I'm including some information on the proofreader I use in the resources section of this program if you're interested. Or send it to someone you trust who's great at proofreading. Whatever you do, I strongly suggest you use a proofreader. You need a different set of eyes, and a quality-finish draft is critical, so don't skip this step.

Finally, when you get the draft from the proofreader, review all their edits carefully. Make sure to accept or even reject some of them as necessary. Then submit the final draft to your client. Make sure you send it to your client, not the customer.

By the way, be careful not to make too many changes at this point other than accepting changes that your proofreader has sent you. If you start reviewing other items within the story and making additional edits, you risk making errors that nobody is going to catch until it's too late.

Summary

That's it. That's the case study writing process.

- You start by gathering all your materials.
- You then go through each of these materials to create your mind map.
- You use your mind map to create a simple storyboard that helps you visualize and talk through the story in the order you're going to write it.
- From there, depending on the client and the situation, you send the storyboard to the client for approval.

- You then write the case study draft in one sitting and without editing.
- You wait a day, and then edit your draft.
- You wait another day and you do your polishing, after which you immediately send the polished draft to your proofreader.
- Finally, you review your proofreader's edits and you submit the final draft to your client.

Introduction to Module 6

In the next module, we're going to talk about how to manage the client approval process and how to effectively manage a number of different scenarios you'll eventually run into.