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

By Ed Gandia

MODULE 6

Managing Your Case Study Projects

Transcript

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Module 6

Managing Your Case Study Projects

Review

Welcome back! Let's recap what we've covered so far in this program.

- We started out by talking why case studies have become so popular and why they'll continue to be important marketing tools for B2B marketers.
- We also discussed the winning case study structure and why it's so effective.
- We then moved on into the discovery and planning phase of the project where you'll gather much of the information you'll need to make your interview with the customer more productive and effective.
- The interview process was next, and we talked about effective interviewing strategies and how to keep the interview on track.
- Finally, we discussed the writing and editing process.

Managing Your Case Study Projects

But now you're at a point where you've submitted your draft to the client and you're waiting for feedback. While in many cases things will flow pretty smoothly from this point forward, it's best to be prepared for a number of different scenarios because when you know how to react to common project management situations, you'll not only help keep the project on track, but you'll avoid headaches that could cost you money, time and potentially even a damaged reputation.

Let's go back to the flow chart and discuss the rest of the case study project process. Then we'll go back and talk about how to handle a number of scenarios that can crop up.

The first step you'll need to manage once you've submitted your draft is getting sign-off from your client. Here's why we've spent so much time in the discovery and planning phase of the project and why you may even have sent the client a copy of your storyboard for approval. What you really want to have at this point in the process is either full or at least 95% approval from your client on that initial draft. At this point, you really don't want to be dealing with massive edits. You want the client onboard with no edits or only minimal edits that you can handle in say 10 or 15 minutes, 30 minutes at most.

Once you've handled those edits, simply send the revised draft to your client and ask them to send it to the customer for review and approval. Of course, if they had no edits, they would simply send it off to the customer directly for review and approval.

At this point, the ball is on the client's court, so it's up to them to get the draft over to the customer and to follow up with the customer to make sure they get comments, edits and approvals on time.

Once they get it back, it's up to them to get the draft and any comments back to you. Here again, if you've done your homework during the discovery and planning phase, and if you've conducted a good interview with the customer, you shouldn't have too many edits or problems at all.

Once you take care of those edits, though, it's a matter of sending the revised draft to your client and closing out the project. But if the customer has problems with the draft, you'll obviously need to take a different approach here and even have some ideas ready to offer to your client.

General Disagreements and Revisions

Let's jump into a discussion on how to handle general disagreements and revisions during not just this phase, but even earlier in the project. Again, how you handle these situations will not only determine the project's profitability for you, but will also determine how long you stay with that client and the kind of reputation you build as a copywriter.

First let's talk about general disagreements and revisions. When it comes to case studies, disagreements can occur early during the discovery and planning phase, and/or during the revision phase. However, you can help resolve most disagreements fairly easily, if you take a few important measures.

Disagreements during the Discovery and Planning Phase

Let's first address disagreements that can crop up during the discovery and planning phase of the project. During this phase, most disagreements you'll encounter, if you encounter any at all, are going to be among the team members in your client's organization.

Disagreements usually center around the case study's objective, the length, tone, style and the specific story elements that should be included in the story. This is why getting buy-in in the discovery phase is so important and why the key project stakeholders need to be involved in that buying process.

It's also critical to have a project owner within the client's company, someone who will help you manage expectations and help keep the project moving internally. I cannot overemphasize the importance of having a committed project owner working with you.

In many cases, the project owner will be the person who hired you for the job, but not always. Whoever it is, just make sure to identify that individual early on and get their commitment to own and take charge of the project internally. This is not typically an issue. Most project owners will even volunteer to take charge, but don't assume that they will. Make it clear what you need from them from the start, and get their agreement early on.

During the discovery and planning phase of the project, it's important to keep your cool and to stay calm. Not everyone is going to be responsive to your calls and your email requests. The key is to always communicate effectively. Stay on top of the project and any items owed to you. And, of course, follow up professionally and in a courteous manner.

Disagreements during the Revisions Phase

Let's talk about disagreements during the revisions phase, which is something different altogether. More often than not, this is where disagreements are really going to come in. The question is not how to avoid them, although as I mentioned earlier, you can avoid a lot of these disagreements, or a lot of the disagreements during that phase, by doing a thorough job in the planning and discovery phase.

The real question, though, is how to deal with them effectively when they do happen.

Here's a **six-step strategy** I learned from my friend and colleague Steve Slaunwhite that I've been using for years now and has worked very well for me.

1. Don't be defensive.

You want feedback. You don't want combat. So listen carefully to the client and try to determine what went wrong. Be open to criticism. Be open to suggestions and new ideas. Don't act angry or defensive, even if you disagree.

2. Explain your approach.

Sometimes the client doesn't understand why you wrote something the way you did or why you left something out of the story. You may need to explain your thinking or justify a particular story element. You may even need to refer to the feedback you received during the discovery and planning phase or to your submitted storyboard if you sent one to the client for review.

Here again, present your position professionally and calmly. Don't get defensive. Many times, the client's confusion was simply the result of being completely overwhelmed. She's going to appreciate your calm demeanor if you stay calm and act professionally.

3. Ask for specifics.

Never accept vague feedback like, "Well, Paragraph 3 just doesn't work for me." Nail down specifics.

Ask your client questions such as:

- Are all the facts correct?
- Am I missing anything?
- Is there any extraneous information I should delete?
- Are there any awkward passages or transitions?
- Did I explain the challenges, the solutions and the results clearly?
- Do the style, tone and vocabulary fit the target audience?

Don't guess. Know what needs to be fixed before you start revising copy.

4. Confirm.

Once you have gone through the copy and clarified the areas that need revision, confirm these details with the client. You can do this verbally or by email, but just get that confirmation so you know that there's agreement and you're not going to waste a lot of time here.

5. Set a deadline.

Never say, "I'll turn this revision around in a couple of days." Always confirm exactly when you'll complete and submit the revised draft. An exacting time deadline is very reassuring to a client.

We'll talk more about turnaround time and revision turnaround time and how quickly you should get these revisions out to the client in a few minutes. But for now, just remember to commit to a day and time by which you think you can have them back.

6. Complete the revisions exactly as directed.

When revising the copy, you may be tempted to explore new angles or try out new ideas. Resist that temptation. Complete the revisions exactly as requested. Otherwise, what could happen is you'll risk opening up a discussion that could turn this revision process into an entirely new project, for which you won't get paid an extra, of course.

This six-step process works very well. Steve and I have both had clients go from being unhappy with a case study draft to praising our writing skills – and even offering us more work – all during the same phone call simply because we followed these steps and acted calmly and professionally throughout the process.

Turnaround Time for Revisions

When it comes to turnaround time, set the right expectations from the start of the project, not when the client requests revisions. Let the client know ahead of time through your written agreement how quickly you normally turn around revisions. I say in my agreement that standard turnaround time on revisions is normally two to four business days, depending on the nature of the revisions requested.

Also, know how to deal with revisions that add a lot of content because you'll eventually get these sorts of requests. This will usually happen when a sales rep or someone from the sales team or other department outside of marketing gets a chance to contribute feedback.

It's very common for an expert to assume that everyone else will be as interested in all of the details and facets of the story as he or she is. But in fact, the opposite is true. Readers of a case study want enough detail to understand the "before and after" story and to be drawn into that story. They expect some color and important details, of course, but they're not looking for a long and confusing day-to-day account of what happened. Anything beyond this will either cause them to put off reading the story because it seems like a lot of content, or will confuse or distract them, or even bring up buying objections they hadn't thought of before.

Here's what to do when you do get these wild requested revisions.

First, make sure that the additions aren't the result of you missing something that you had agreed to discuss or include in the case study.

If it's because you missed something, go ahead and try to incorporate the revision within the length parameters as best as you can. But if it's outside the outline, the scope or direction of the case study, or if it goes against what the customer relayed to you in the interview, then you have to have a discussion with the person who added the content or with the project owner. Explain why this revision changes the agreed upon length or the scope or the direction of the story, or why it goes against what the customer said.

If the project owner feels it's absolutely necessary to make this revision, then you'll just need to decide how to handle this from a billing standpoint.

My personal approach is that when the revision or additions will add or represent more than about one page or so of content in the case study, or they're significant enough that they'll take more than say 30 to 45 minutes of work, I will let the client know that this is out of scope and will entail an extra charge.

I do make exceptions for really good clients or when the content is pretty much 100% there already because there's no heavy editing required. Or because the client has already gone ahead and written in the basic edits they want and I just need to tweak it and refine it, then I'll be a little more flexible. We're not talking about a lot of time to make those revisions.

Revision Requests You Receive Months Later

Another situation you might run into is revision requests that come to you months after you've submitted that first case study draft. It happens more frequently than you can imagine, especially considering that there's a two-part revision process in play here. First, with your client reviewing the draft, and then with the customer reviewing that draft.

It's rare for both your client and the customer to turn around their revisions or comments in a few days. Two to four weeks is more common, I've found, in B2B. That's why it's important to spell out in your agreement that the timeframe by which all revisions need to be submitted is going to be X number of days.

In my case, the timeframe I ask for is 30 days after I've submitted the initial draft. But again, I'm flexible to a point with good clients. Where I'm not flexible on that timeframe is when the revisions come in months after I've submitted the initial draft. My advice here is to look at the revisions they're requesting and try to determine how long it's going to take you to make them. Then quote a flat fee based on the estimated time it would take you to make these revisions and your internal hourly rate.

Don't quote the hourly rate. Just quote a flat fee to the client. Specify that this includes this round of revisions and one more round of minor edits because you're bound to get some minor edits after you've submitted this set of revisions.

For example, say that the revisions are significant – not major, but certainly not light revisions. You figure they'll take you about an hour or maybe an hour and a half to make them. Let's also assume you're trying to keep your internal billable rate at $125 an hour. If that's the case, you could tell the client that the revisions will run $200 as a change order. Here, to make this calculation, I figure it on the higher end of that range and then just round it up.

Again, this would be something I would do only if the revision requests come in months after I've submitted my initial draft to the client.

"Major Surgery" Revisions

There's yet another revision situation you'll run across every once in a while. It's what I call "major surgery." Typically, in these situations, the client doesn't understand that what they're asking for will involve some serious work and will alter much more than the paragraph for a section they're asking to be revised. It many cases, it will alter most or all of the case study draft. Sometimes it could even involve hopping on the phone with the client or with the customer to get clarity on some of the items that you're asked to revise.

That's another reason why it's important to spell out in your agreement that revisions only cover in-scope work. In fact, I suggest you spell out what's covered and not covered by saying something to the effect of: *"The project fee does not cover a change in direction, scope, content, or document length. Such out-of-scope work will be quoted separately and can be completed by mutual agreement*." That language is close to what I have in my client agreement document.

By the way, the point of having this in your written agreement is not so much to protect you legally, although it can't hurt. Rather, it's so that you have something you can point to when talking with your client about why this is going to now add to the cost of the project by saying something like, *"As you'll see in our agreement, Mr. Client, I include up to two rounds of requested revisions, as long as they're within scope and agreed upon direction, length and content*."

Of course, I would say this and have this discussion if there's some pushback on the client's part. I find that in most cases clients are respectful and they understand my need to now issue a change order for these revisions.

As a side note, I include up to two rounds of requested revisions in my case study estimates. I've found that this is a fair number of revisions. It allows for one set of revisions when the client reviews the draft, and another set when the customer reviews that draft. I sometimes get one final set of edits from the client and I almost always just go ahead and do them because at this point they usually take me all of a minute or two to fix them. There's no use in being a stickler about the fact that I only agreed to two rounds of revisions.

How to Contact Hard-to-Reach People

We just talked about how to effectively handle general disagreements and revisions with your clients. Now we're going to talk about another project management challenge that you'll inevitably come across as you work on more and more case studies. That is, hard-to-reach people in your clients' organizations. I'm talking about salespeople, sales managers, account managers, internal experts you may need to talk with, etc.

The other person you may have a difficult time reaching is the actual customer you need to interview if your client has charged you with handling the interview yourself.

Getting a hold of people can be tough. Sales reps, account managers, customers – they're all busy people. They're often out of the office, traveling. And again, many times they're doing the work of what used to take two or three people to accomplish, so it's not uncommon for them to be hard to reach or even unresponsive. So what do you do when you come across this problem?

First, always be polite and professional.

Don’t be rude. Don’t lose control. Keep in mind that they may not have the same vested interest the case study that your project owner has.

Use both email and voicemail to try to get a hold of people.

This really increases your chances of getting a response. Some people are really bad about returning voicemail messages, but they’re really good about email, and vice versa.

Always explain why you’re calling.

Leave a detailed message in emails. Let them know when they can reach you, what timeframe you’re going to be at your desk by the phone. Don’t be cryptic in your message. They don’t have time for that. Leave information that will help them get back to you with answers. Let them know what you want from them so when they do call you back, they can give you that information right away, and if you’re not there, they can leave that information on your voicemail.

When scheduling interviews, schedule an actual day and time to talk rather than leaving it open.

When trying to schedule interviews or conversations with people, try to schedule an actual day and a time to talk rather than leaving it open. It really increases the chances of having that conversation.

Keep your project owner informed of your progress.

Communication is really key here. After three or more unsuccessful attempts, let the project owner know and see if she can help you secure that interview or get a phone appointment with that individual.

If the hard-to-reach person is someone in their own company, don't throw that individual under the bus too early. You're going to need them and you need that conversation to go smoothly. Be careful, be professional and stay calm.

I've found that when you handle this process professionally and you keep the project owner informed of your progress, you won't really have much trouble. She'll get things moving for you and help you out. After all, you've been hired to write the document, not to make the whole thing happen from the beginning to end. That's her responsibility.

When Everything Seems to Be Going Wrong

There's another project management challenge you might encounter that we need to discuss here. It's basically a situation where everything seems to be going wrong.

This is rare, so I don't want to scare you. If you follow the steps in the discovery and planning phase, along with the tips in this module, you will really minimize your chances of things going that wrong. In fact, almost any horror story you hear about a case study project going horribly wrong can be traced to not managing the project well by putting in the measures I've discussed in this program.

I've written hundreds of case studies, articles, reports, brochures and other marketing pieces, and I've ever only had one situation where everything went completely wrong. To be honest, looking back at it, I could have probably avoided many of the problems that came up had I done a better job with the buy-in process in the discovery and planning phase.

But should you come across a situation where things are getting out of hand, I want to give you some suggestions on what you can do to turn it around.

First, communicate with your project owner.

He or she is your advocate – your lifeline – so try to reason with him or her and see where things went wrong, why they went wrong, and what it will take to rectify the situation.

When all else fails, again, refer the project owner to your conversations during the discovery and planning phase and your approved storyboard if you sent one to them. By the way, that's why I advocate sending a storyboard for approval when the client is a new client or it's the first time doing a case study with them. You don't yet know how they work, how reasonable they really are, what their expectations are for case studies, who else might come in and throw the project off course, and that sort of thing.

Refer them to your written agreement if you feel they're asking for things you just didn't agree to do. But make sure to always explain your position calmly.

Since we're on the topic of your written agreement, let me specify some key items that it should contain. We've talked about some of these already, but let me give you what I think are the elements that are very important to include in any written agreement for any B2B copywriting project. These aren't all, but these are some of the most essential ones.

- The number of revisions you're including in this project
- The fact that all revisions must be within scope
- What happens when revision requests are out of scope
- How these revisions will be handled:
    - If you will have to quote them separately
    - How you'll quote them
    - Turnaround time to get revisions back to the client, etc.

- A description of client responsibilities – the fact that parts of the project hinge on you getting timely information from the client and from their customer (It's very important to have some language around that)

- A cancellation clause that details a "kill fee" or a cancellation fee and how you will calculate that fee should you get to that point

- When you'll bill for the project

Let's say you turned in that initial draft on the 15th of the month. You will either invoice for the balance of the project due then, or in my case, I always invoice one week after I've submitted the initial draft. Then final payment is due within 15 days of the invoice date. In other words, that last payment for the project is dependent on when I submitted the initial draft, never dependent on when the client decides to send all their revisions in and approve things internally.

QUICK TIP:

Never make your final invoice dependent on approval of a final draft. *Make your final payment based on when you submitted your initial draft.* This is one of the biggest mistakes I see writers make. It really puts you in an out-of-control situation.

Again, the biggest reason to use a written agreement that includes all of these elements is not as much for legal reasons as it is for avoiding finger pointing. It just helps you guide the discussion and keep it calm and civil should things really go south. Frankly, it's tough to argue against you if you can clearly defend your position with an agreement they read and signed themselves.

My recommendation is to hire an attorney to draft a standard agreement for you that includes all the items I mentioned here, plus any other protections and legal items your attorney feels should be included in that document.

Here's what I did. I got an attorney to draft a master agreement or master contract for me. Then he also included two other documents – Schedule A, which is where I list and detail the description of services for the particular project, and Schedule B, which details compensation and billing provisions for that particular project.

The master agreement never changes. The only thing I have to change is on the first page of that agreement – I have to put the client's name.

Schedule A and Schedule B are the only things that change. There's some basic language in there already that I don't touch. All I do is change or indicate in detail the scope of work on Schedule A. On Schedule B, I make some changes to the compensation and billing and include the fee for the project. It's very simple. It's very modular. Again, the master agreement doesn't change. I just change the other two documents.

It's money well spent. It's something I highly recommend you do. I've used my agreement more than a hundred times over the years, so it has more than paid for itself with all the uses.

If you do this, make sure to get an attorney in your state or province who works with self-employed professionals, freelancers or consultants. You really want somebody who understands your business and your world, the world you work in and live in.

When the Customer Will Not Approve the Case Study

What do you do when the customer – not your client but the *customer* – will not approve the case study?

This is much more common when you've skipped the preapproval step and the discovery and planning phase we talked about in a previous module, or when your client just picked the wrong champion inside that company to interview. But even when you do everything right, key pieces of the story could get nixed towards the end, or the entire story could get rejected.

One reason this happens is poor communication between the customer you interviewed and their own legal or PR department. Other reasons could be that during this entire process that individual leaves the company or the company gets bought or acquired. I know it sounds a little farfetched, but these things do happen more frequently than we'd like, and when they do, you'll end up with a frustrated client.

There are a couple of things you can do. If you suggest some of these ideas to your client and they end up working for them, you could quickly become their hero. You're getting paid regardless, but showing the client that you have ideas to help them get value out of this investment that seems to be going south quickly – this is really going to elevate your status with them.

Not Naming the Customer Directly the Case Study

One possible solution would be for your client to ask their customer if you could make the case study an unnamed story, meaning that you remove the customer's company name from the story and just refer to them in generic terms. For instance, if the customer you wrote the story on is Home Depot, you could refer to them in the story as "a major home improvement retailer." Or if the company is DuPont, you could say that this company is "a Fortune 100 chemicals manufacturer."

Not naming the customer directly is a very common request among very large companies. What sometimes happens is that the customer champion, meaning the person you interview in the customer's company, is so gung-ho about getting their story published and getting it out there that they don't do the necessary checking internally within their company before proceeding with you. You can end up with this situation very easily.

This is obviously not the optimal scenario because prospects typically want to know who the company is when they're reading the case study, and it's going to be tough for your client to get press coverage on that story if they can't even name the customer. But it's still better than ending up with nothing, especially at this stage of the game.

Making the Case Study a "Campfire Story" for Internal Use

If the request to make that case study into an unnamed story fails, all is not lost. Your client can still use that case study internally for what is often referred to as a "campfire story" in the way of internal PowerPoint presentations, internal training for new salespeople or new employees, even conversations that salespeople have with prospects.

For your client, having that kind of information internally to share among employees can be very, very helpful. And for salespeople, having those story details documented can really help them have more meaningful off-the-record conversations with prospects.

Obviously, whether or not your client shares this document internally, or how they use it, or how many liberties they take in sharing this case study information in conversations with prospects – all that is completely beyond your control. But my point here is that you should suggest to the client that there's still value in having this story captured and how it can be leveraged even if it can't be published.

Managing Your Case Study Project "Internally"

We've just covered all the key elements of keeping the project on track when it comes to your client and when it comes to interacting with the key players in the project. But there's also an internal component to managing a case study project. By "internal", I mean internal to you as the case study writer. I'm going to spend a few minutes giving you some practical tips and advice for how to approach and tackle these projects successfully.

Layer all of your tasks related to the project.

As you can probably tell by now, case study projects have many moving parts. There are people to interview, maybe some research, transcription time, back-and-forth revisions and so forth. So it's important that you do a good job scheduling all the project elements.

This means that for tasks where you know you're going to have to wait on others, you should start scheduling and setting them in motion early in the process – for example, contacting the customer for the interview. You should do that early in the process so you can get that going. But then while you wait to hear back and while you wait for the interview day and time, go ahead and schedule and have your back-story call with your client.

Also, while you wait for the interview transcription to arrive from the transcriptionist, start organizing all of your other information that you'll need to write the story and start doing some of the storyboarding based on what you already have.

Break down the project into its major components. Then break each of those components into little pieces.

I like to think of these final little pieces, these tasks, as Lego pieces. I prefer to work in two-hour chunks of time. Sometimes I have to do two two-hour blocks in one day on a single project. I try to avoid that, but sometimes I'm running a little behind and I have to do two two-hour blocks, but I prefer doing only one two-hour block per day on a project.

For instance, you know you'll have a discovery and planning phase, an interview phase, a writing phase and a revisions phase. But within each of those, as we've discussed in this program, there are several steps involved. So break down your project into each of those steps and then schedule those steps and more detailed tasks individually in your schedule.

Know how many hours you're going to need to put into the project.

How much total time should you estimate for a case study project? Well, it all depends on the complexity, the type of case study you're writing, the number of interviews you'll be conducting, the amount of background research you'll have to do, if any. However, as a rule of thumb, you can figure on it taking you anywhere from five to 10 hours total beginning to end.

Of course, as you get better and more experienced, your overall time will go down, even on very complex projects, to the lower end of that range.

Use a time-tracking tool.

Use a time-tracking tool or time-tracking software, especially for your first five or six case study projects. And try to get detailed with your tracking. Knowing how much time on average you spend on discovering and planning, or on interviewing, or on writing and editing – that's all valuable information. It will help you manage your time better on future case study projects and it will help you quote more accurately in the future.

Once you have you have the individual components of the project laid out, spread them out on your calendar.

As you do that, make sure to build a bit of a buffer to allow for unexpected changes or delays.

In fact, one thing I haven't mentioned yet is that when you commit to a deadline, be clear with your client that this deadline is dependent on you getting the information you need when you need it. If someone in their company is taking longer than expected to get back to you, or the customer hasn't gotten back to you on an interview time or day, or there are any other delays – for instance, getting approval on the storyboard – or any delays on the client side, that date will have to get pushed. They need to understand that. In fact, I usually won't give out an estimated date for my first draft until I've had all my calls done and my interview completed.

That aside, however, I still like to build a buffer into my schedule, so even once I've completed the interview and I now have a much better gauge of when I can submit that draft to the client, I'll still add one day to the project submission date. That way, if I'm running a little behind, I have a little bit of wiggle room in my schedule.

Make sure to build in some incubation time at key points in the project.

As I mentioned in a previous module, I let the draft rest for a day or two before doing my first round of edits. I do the same thing before going through it again when I do my polishing. And once I get it back from my proofreader, I like to give it one last read just to make sure that everything is still flowing nicely.

I always catch something at every phase. These are things I wouldn't have caught had I not looked at the project fresh because I let it sit, I let it rest, and I had some incubation time.

One piece of advice I mentioned earlier – be careful when you do this after you've gotten it back from the proofreader. Too many changes after you've gotten it back increase the chances that you'll make a typo or some sort of error.

You're also going to need to schedule any revisions that come back from the client if those revisions will take more than just a few minutes.

Again, don't think that when you get revisions from a client, you need to stop everything you're doing and turn those revisions around right away. Sure, make them a high-priority item, but don't train the client to think that you're going to clear your schedule to take care of case study revisions.

It helps to set the right expectations up front on turnaround time by stating your standard turnaround time in your written agreement. Again, I usually say "two to four business days" in my agreement to turn around revisions.

Always use your word processing program's "track changes" feature when making your edits after the client has made theirs.

And, of course, ask the client and have the client ask the customer to use that "track changes" feature when they make their own edits.

Always insert comments with questions or on areas that need their attention, or to further explain why you rejected a change or why something they've added won't work. Do this even when you've had correspondence with the project owner about a question because, as the revised document gets passed around from person to person, everyone in the revision team needs to know why key items change or what open questions remain and so forth.

Summary

- There are two major important aspects to managing your projects effectively: *external* and *internal* management.
- We talked about to handle both *general disagreements* and *revisions requests*, and how to do this effectively and professionally.
- We also discussed the importance of having a *committed project owner* on the client's side who will be an advocate for both you and the project, and will help you keep the project on track.
- We went through a *six-step process for handling disagreements* during the revisions phase, and what to do when revision requests are either out-of-scope or way overdue.
- We talked about how to work with people in your client's company or with a customer you need to interview if they're *hard to reach*, and what to do should the project in general take a *big turn for the worse*.
- From there, we moved on to *internal management strategies*. We discussed the importance of layering and scheduling your tasks strategically, how to break down your project, and how long you can expect to spend on a typical case study project.
- We discussed *incubation time* and why that's important.
- We talked about ways of *building a buffer into your schedule* and why that's critical, and how to *set the right expectations with clients* when it comes to turning around revisions.

Introduction to Module 7

In the next module, I'm going to give you some strategies for how to market yourself as a case study writer, how to land case study projects, and how to price them effectively.