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

*By Ed Gandia*

MODULE 7

**How to Land Case Study Projects**

**Transcript**

AWAI
AMERICAN WRITERS & ARTISTS INC.

*Published by:*

**American Writers & Artists Inc.**
**245 NE 4th Avenue, Suite 102**
**Delray Beach, FL 33483**

**Phone: 561-278-5557 • Fax: 561-278-5929**
**Website: http://www.awaionline.com/**

Module 7

# How to Land Case Study Projects

## Introduction

Welcome to **Module 7 – *How to Land Case Study Projects***.

You can be the best and most talented case study writer in the world, but if you don't market and sell yourself effectively, you're going to find a tough road ahead. Potential clients won't even know you exist, let alone contact you to discuss a possible case study project.

So how do you spread the word? How do you do it efficiently and cost-effectively? And how do you increase the chances of landing that case study project? That's what we're going to be discussing in this module.

I have to warn you that this is a big topic. There's no way we can possibly cover it all in one module. In fact, we could easily spend two or three days on this topic alone. It's that important and there is that much information we could cover.

But we don't have that sort of time and I'm sure you're ready get going as quickly as possible, so what I'm going to share with you in this module is a summary of the most important elements you need to have in place and the most important actions you're going to need to take to land these projects faster and profitably.

I've essentially organized this material into four basic steps. Let me first tell you what they are and then we'll go into each one of them in much more detail.

1. **Position yourself as a case study writer**
2. **Go after high-probability prospects**
3. **Show credibility**
4. **Price it right**

# Number 1
## Position Yourself as a Case Study Writer

This is the obvious first step you must take, and it basically involves hanging your shingle and letting the world know that you offer this service.

The first thing you're going to want to do is to add it to your list of services on your website, but don't stop there. Make it really obvious that you write case studies. Dedicate a whole page to this type of project, and even consider adding this page to your website's navigation right up there with the other main pages. It will increase the chances that visitors to your site learn about this new offering of yours.

Your case study page doesn't have to be very involved – 100 to 300 words will be plenty. But make sure to explain why you're the right choice for the prospect's next case study project, and support that claim with information about your work background, work experience, industry expertise and a couple of good case study samples.

You don't have to have all those elements there, but if you have a background in, say, the healthcare industry, then let the reader know that. It's okay to position yourself as a generalist B2B case study writer, but make sure to highlight that experience and background in healthcare. That way, when prospects in the medical equipment or healthcare industry read this page, you will stand out as someone who already gets their industry to some degree.

Of course, if you have a diverse professional background, highlight some of the key areas of expertise or knowledge. Prospects today aren't just looking for any case study writer. They're looking for someone who can get up to speed on what they're selling and whom they're selling to as quickly as possible. They want someone who understands some of the nuances of the business, things that are just hard to teach someone who hasn't been there.

As far as samples, one to three samples is plenty. Resist the temptation to upload everything you have once you get a few of these projects under your belt. You don't have any samples yet? Don't worry. Later on in this module, I'm going to give you some simple ideas on how you can take care of that fairly quickly.

Again, it sound basic, but many writers offering new services overlook these key tasks. Make sure to let the world know about this new offering. Say it loud and clear, and tell them what makes you different and better than many other case study writers. You don't have to say you're the best. You just have to show that you're different from the average case study writer. I gave you some ideas on how to do that, and I'll have a few more later on in this session.

## Number 2

### Go After High-Probability Prospects

By "high-probability," I mean prospects that are more apt to hire a freelance copywriter to write a case study, and they'll be willing to pay a professional-level fee for that case study. This might seem like common sense, but new copywriters, including me when I was getting started, fall into the trap of assuming that everyone is a prospect. After all, every B2B company out there needs case studies, right? Well, not really.

The first part of this is to really go after the right types of companies and the right job titles within those companies.

The second part of this formula is to employ prospecting methods that give you the biggest impact for your time and money invested.

## Go After the Right Companies and Job Titles/Individuals within These Companies

Let's talk about the first part of this effort – going after the right companies and the right job titles or individuals within these companies. Yes, it's true. Most businesses can benefit from having a library of case studies to help them generate leads and close more sales, but your job is not to try to convince them of this. Your job, as a case study writer, is to only approach companies that already get it. In other words, companies that already understand the value of having well-written case studies and having engaging stories about customer successes, and are willing to pay professional-level fees for that copy and for that content.

While your uncle Joe's forklift business could use a couple of solid case studies, if Joe truly believes that he's been fine so far without them, "so why bother?" you'll be wasting your time and energy trying to convince him that he needs to improve it. That means that responses along the lines of, "Son, I've been selling forklifts for 30 years without case studies and professional brochures. What makes you think I need them now?" That kind of language is a clue that you need to move on.

Instead, you need to find businesses that are already educated at some level on the value of having and using case studies in their marketing and sales process. Also, focus on organizations and industries where you would have the highest probability of success, again, either because of your background, your experience, skills, your client roster, specialized knowledge, and location – or because of current changes or growth in that industry.

Even if you're new to copywriting, don't underestimate the value of your previous work experience. In fact, in business-to-business, it's often this experience that will make you more attractive to many of your clients than just your copywriting skills.

Let me give you some other criteria to consider as you build your list of prospects to approach. Companies that are growing, expanding, changing strategy, launching new products or acquiring competitors – those can often be good targets because such events tend to create copywriting needs, including case studies, that can't be fulfilled completely with internal staff.

So look for companies that are growing and doing well, and pay particular attention to companies in growth or hot industries and sectors. For instance, as of this recording, defense spending is really big in the United States. So is technology and healthcare. There are others and there are pockets within these industries that are doing extremely well. Find out what they are and look there.

Also, look for companies that already have case studies available on their website – they either have them available for instant download or they can be requested by filling out a form. That tells you that they already get it. They already understand the value of case studies in the sales and marketing process.

While you're there on their website, try to get a feel for how much they already have in the way of written marketing materials, and focus on companies that have a lot of them, a lot of content. That means they have a need for content, and that's a good sign for you, as a case study writer.

Next, I would consider sticking with companies that sell relatively expensive products or services. The more expensive a product or service is, the more a considered purchase it's going to be, meaning the more people that will be involved in a buying decision for that product or service, and the more written materials that will need to be created.

By expensive, I don't mean you need to know exact prices, but, obviously, if the company's products are priced at, say, $300 or $500 each, that's not going to be as good a prospect as a company selling large equipment for manufacturing plants, for example.

Your prospects don't need to meet all these criteria, but when compiling a list for your prospecting efforts, you're trying to get the odds in your favor, so the more key factors these companies meet, the better. Either way, the important thing is to take your time assembling the best prospect list possible because really to a large extent the success of your prospecting efforts hinges on your ability to start with a quality, targeted list.

Let me give you one more option to consider that's in a different category altogether – B2B ad agencies and public relations firms. I tend to say "PR firms" for short. Many of them don't have in-house staff writers, so they have to hire freelancers to complete many of their projects. And believe it or not, many of these organizations have a hard time finding good B2B copywriters, especially those with experience writing specific projects, such as case studies, or with experience in a variety of industries.

There are some disadvantages to working with ad agencies and PR firms. They include lower fees, faster turnaround, expectations, and so forth. But in general, these companies tend to have a steady stream of work for a good copywriter, so if you're trying to get some activity going and you need to get some good samples quickly, I would definitely consider some of these firms as your targets.

Besides looking for companies that already understand the need for case studies, it's important to focus your time, your money and energy promoting your services only to the right people in those companies. Who are those people? Well, in smaller companies, it might the president or owner because she's probably in charge of marketing, among other things. But in mid-sized to large organizations, the best job title to focus on is the *marketing manager*. Marketing managers are responsible for day-to-day marketing activities and their execution. This includes copywriting, content development, campaign development and execution, and lead generation.

**Other good individuals to target could be:**

- Marketing communications managers, also called "marcom" managers or directors Direct marketing managers
- Online marketing managers
- Public relations managers
- Product managers
- Product marketing managers
- Vice presidents of marketing

Again, when you have a choice, go for the marketing manager or one of the marketing managers or all the marketing managers.

## Use Prospecting Methods and Approaches That Have the Highest Impact

The second part of this effort is to use prospecting methods and approaches that have the highest impact. By that I mean to use strategies and tactics that tend to yield good-to-great results from the least amount of time and money invested.

Here's why this is important. In an effort to just make something happen, too many copywriters resort to whatever lead-generation tactics sound good at the time. Maybe they just heard from a colleague who had good success with a postcard campaign, so they do a little bit of that. And when that doesn't work, they start cold-calling a partial list of prospects. The following week, they go to a few networking events without giving much thought to the types of people who might be there and whether or not they're even good prospects.

## The Marketing Effectiveness Matrix

Granted, some activity is better than no activity at all, but this haphazard, scattered approach to generating leads is not the best use of your time, energy and limited funds. What you need instead is a framework that helps you make smart decisions about where and how you spend your limited resources. That's where the *Marketing Effectiveness Matrix* comes in. I call it MEM for short.

The MEM is a tool I created that helps you make smarter prospecting decisions. This classifies the most common marketing tactics by how effective they are and how much time they take to develop and execute. By doing that, the MEM allows you to make lead-generating decisions based on your specific goals and on your unique situation, not on whatever sounds good at the time.

You'll find a copy of the MEM in this program, so go ahead and download it now if you haven't already done so. You'll see it's divided into **four quadrants**.

- **Quadrant 1** contains lead-generating tactics that tend to be both highly effective and time-efficient.
- **Quadrant 2** represents tactics that are also very effective but require more time to develop and execute. Regardless of your goals, most of your efforts should revolve around these first two quadrants.
- **Quadrant 3** contains tactics that could work very well, but you have to be very selective here, as the effectiveness of these tactics is often much lower than for the tactics in the first two quadrants.
- Finally, there's **Quadrant 4**, and these activities represent tactics that are mostly wasteful because they take way too long to carry them out. They also may deliver questionable – or even very little – value.

Amazingly, many B2B copywriters at all levels of experience spend an inordinate amount of time on this quadrant. In fact, this is where you're going to quickly end up when you start trying a number of different tactics out of desperation. That's why it's important to have a sound prospecting plan. Otherwise, it's really easy to confuse activity with effectiveness.

Once you understand how these tactics are classified, you can then use the MEM to make lead-generating decisions that work best for you. For instance, a stay-at-home mom who wants to gradually start writing case studies for B2B companies in her spare time will have very different needs and potentially less time to spend on lead generation than, say, a father of two kids who just lost his job and needs to start landing case study projects as quickly as possible. By using the MEM, each of these individuals can come up with lead-generating approaches that are aligned with their goals and time constraints.

Even though **Quadrants 1, 2**, and **3** are filled with marketing tactics that can help you generate quality leads, there are a few tactics that have been proven to work over and over again for B2B copywriters. And when it comes to launching a case study writing practice or looking for case study clients and projects, there are four in particular that I would urge you to focus on:

- Existing clients
- Social media
- Tapping your network
- Direct mail

Let's address each of these individually.

## Contacting Existing Clients

Aside from the fact that these individuals are excellent sources of referrals for case study work with some of their colleagues within the industry – something we're going to touch on a little later – existing clients are the first people you should approach once you've hung your case study shingle. These people trust you already. They know your work and your ability to deliver, so they're the logical place to go. In other words, start where it's easiest.

I find that too often freelancers lose projects to competitors because clients are unaware of the many additional services their freelancers offer. So as you add case studies and other services to your roster, please go to your existing and even your previous clients and see if you can help them with a current or upcoming case study project.

Don't just go to your main contact in the company. If your contact doesn't really handle case studies, ask to be introduced to whoever does.

## Tapping Your Network

Outside of contacting existing clients, reaching out to your personal and professional contacts is the most effective and the most underused lead-generating tactic for B2B copywriters. All of us know people who work for companies that sell products or services to other businesses. If they work in the marketing department, you've got it made. But even if someone you know works in a different department, he or she can often introduce you to the people you need to talk with.

To approach your contacts about making introductions for you, you're going to have to develop a very clear statement that describes what you do in layman's terms. Most people have no idea what a copywriter is or what they do, and if they're not in marketing, they're probably going to assume that you do legal work and file copyrights, so you're going to need to use other language.

**Here's an example of a script you can adapt to your own situation:**

> *"Hi Beth. I'm calling because I've recently launched a commercial writing business. Specifically, I'm leveraging my corporate training experience to help companies in that industry write better marketing and sales materials.*
>
> *"I wanted to see if you could introduce me to one of the marketing managers at Apex Training just to see if my services would be of value to them. I've found that many companies in your industry have more marketing materials to write than they have time or resources to create them, and I can help fill that need in an affordable way."*

Let's talk about this script and why it works so well.

- You position your new venture as a *business*, not a hobby.
- You've explained *what you're doing* and *why you're targeting her company*, which is very important.
- You're also *specific about the job title* you need an introduction to.
- You're clear about what you want. You're looking for an *introduction*.
- You come across as a *true professional*, not as someone trying to bully their way in.
- You've explained that *there is a demand for what you do*. You're not trying to pitch some off-the-wall service for which there's no need.

  (Notice I'm not suggesting you specifically name case studies. That's an industry term that's only going to confuse your contact. There's no need to get into that level of detail, at least in this initial request.)

- You help companies fill this need *cost-effectively* and you talk about that. It doesn't mean you're cheap. It means that you deliver great value and that you're a more cost-effective option than hiring a full-time employee.

Craft your own script based on your own message or specialty if you have a specialty. Use your own style. Make it your own. And practice this script, which can easily be turned into an email, by the way, until it feels and sounds very natural. Then try it on your closest friends and relatives, and refine it as you get a better feel for what works and what doesn't work.

## Social Media

I mention social media because it's so closely tied to the previous approach – tapping your personal and professional network.

I realize there are many, many ways to use social media to market your services, many more ways that we have time for in this program, but the one way I urge you to consider using it is to spread the word about your services to your friends, family and colleagues. Sites like Facebook and LinkedIn, for example, allow you to connect with current and previous friends, relatives and colleagues, and update them on what you're up to. It's a great way to let them know about your case study services, your copywriting services overall, and to reach out to them via these social media platforms rather than email.

Plus, you'll be able to see where these individuals are now working, which can help you better determine if you should approach that person or not. Here's an example. A copywriter I know approached key people he used to work with in the last two companies to see if he could talk to them about helping them with their marketing communications. As a result of that effort, he landed two clients in a matter of weeks using LinkedIn particularly.

## Direct Mail

Besides the tactics we've discussed, most copywriters will also need to implement a supplemental prospecting tactic that can predictably generate a steady stream of leads throughout the year. And the best way to do that is with direct mail.

Direct mail enables you to reach hundreds of prospects quickly and cost-effectively. It's also a very predictable method in that over time you'll know roughly how many letters you'll have to mail to generate just one lead. This predictability makes direct mail a very adjustable tactic. As your capacity to take on new clients and your income goals change, you can easily adjust the number and frequency of mailings to reflect your needs.

For these reasons, direct mail should become the one prospecting activity you continually run in the background while you carry out other promotional efforts.

What's working in direct mail? Well, rather than overtly promoting your services through a letter and saying something like, "Hire me for your next copywriting project," or blasting out thousands of postcards or letters at one time, you're going to be using a much more strategic two-step approach with your direct mail campaigns.

The first step is to offer prospects relevant and valuable information in the form of a free special report. However, it doesn't necessarily have to be in a report format. **You can also create:**

- A workbook or a checklist
- An overview of survey results
- A toolkit
- A bundle of similar articles on one topic
- A how-to guide
- A list of tips
- An explanation of a particular best practice

To work effectively, the topic of your report must somehow be related to case studies since what you're going to be promoting are case study services.

Also, prospects must want the information, so the topic is going to need to be juicy. It's going to need to be relevant and valuable enough that they'd be willing to give you their contact information or at least their email address to get a copy of the report.

**Here are some examples of good report topics:**

- *10 Proven Steps to Creating Your Own Lead-Generation Machine*
- *How to Leverage Your Sales Force to Boost the Effectiveness of Your Marketing Materials*
- *3 Simple Steps to Getting Customers to Happily Agree to Participate in a Case Study*

You'll notice that the first two examples would be better suited when you're trying to generate general copywriting leads. The third example would be ideal if you're trying to focus on generating case study prospects.

Your direct-mail letter's main objective is to persuade the prospect to request a special report. The second step involves following up with all prospects who download the report – who are now leads since they've requested something from you.

Why does this direct mail approach work so well? There are a number of reasons, but here are some of the most important. First, it's efficient. You can print, fold and stuff sales letters in the evenings and mail them the next morning. That means they're spreading your message while you're busy with other projects or working at your day job if you're a part-time copywriter.

Also, it allows you to expand your reach. Local networking is great when done right, but if you live in a rural area, the networking opportunities might be very limited or non-existent. Or if you have a day job, it's going to be very difficult for you to get out and make a lot of these networking events.

Direct mail evens the playing field. It allows you to reach out to companies in other cities, states or provinces for the cost of a postal stamp.

Also, direct mail completely changes the dynamics of the first interaction with your prospects. When someone responds, they're indicating interest in your message, your special report, and possibly even your services, which places you in a position of strength. Conversely, when you cold call a prospect, they've yet to see any of your work or determine your potential value, which puts you in a position of weakness.

Finally, direct mail enables you to handpick your targets. Other prospecting tactics, for instance, networking, writing articles, social media and so forth, will generate leads you weren't directly targeting. That's okay, that's great, but direct mail gives you an opportunity to go after quality prospects that you've personally handpicked. And that gives you some control over your prospecting efforts.

# Number 3
## Show Credibility

You've done a good job of generating interest in your case study services by compiling a high-probability list and reaching out to these prospects with methods that are cost-effective and time-efficient but yield great results. However, generating great prospects is not going to do you much good if they don't feel like you're a credible and capable case study writer. And in order to overcome that hurdle, you're going to need to demonstrate some credibility. Specifically, you need to have a good set of samples, a few testimonials, and even a few articles or a special report or white paper on the topic of case studies.

### Samples

I mentioned samples earlier, and I explained that you don't need a boatload of them to demonstrate credibility, but you do need at least one or two. So what do you do when you're starting out and don't have any? Here are some ideas.

Go to your best clients who already trust you and may very well be willing to give you a shot. Make it worth their while. Take much of their risk away by offering to write their next case study for half of your standard fee, but make it clear that it's just one case study you're going to do that for.

Another idea would be to approach your friends, some relatives or colleagues – people who know and trust you – and either work for a company that might be willing to give you a shot for a heavily discounted fee or may own their own business and can make that decision themselves. Again, make them an offer they can't refuse.

Here's an extension of that last idea. Post on Facebook or on LinkedIn that you're willing to write a case study for free to your first three friends or their friends who work in B2B companies. Make an appeal. Ask for their help and explain why you're doing it this way. In exchange, all you're asking for is to have permission to use the piece as a sample on your website and for a brief testimonial from them if they're happy with the draft or they're happy with the case study.

You can do the same thing by going to an online forum of B2B companies or to a LinkedIn group of B2B companies. Your best bet, if you're going to go for that, is to target forums or groups that are mainly for small B2B companies. The reason for that is that smaller B2B companies can make decisions very quickly, and you're trying to generate a sample as quickly as possible.

I know some of you might balk at the idea of writing something for free, but keep this in the right perspective. This is an investment. You're not setting a precedent here. Instead, you're being very clear about what you're looking for and why. And you are getting something in return – you're getting a good set of samples.

This is not a practice that you're going to continue. This is very temporary and it's going to give you what you want quickly.

## Testimonials

The next thing you're going to want to do is to post two or three testimonials on your website about your case study services. These testimonials will show prospects that you know what you're doing, that you produce great work and that clients are happy working with you.

How do you get testimonials? Well, same as above. Make it a condition to doing that sample work for free. Also, approach current and previous clients about your work and professionalism, even if it wasn't on a case study project specifically. Offer to interview them for five minutes and write a draft of a two- to three-sentence testimonial for their review and approval. That's usually going to get a big yes because it's going to make it easier on the client so they can quickly tell you what they think about you and you can draft that and send it to them for review.

For the interview, when I do call them to draft that testimonial, here's a question I always use, and it's only one question. I ask, *"Bill, if someone were asking you about me and my services because they were considering me for a project, what would you tell them?"* It's a simple question. You'll be amazed at the information you get within about three minutes.

## Articles, Special Report or White Paper on the Topic of Case Studies

Finally, you can showcase a few articles or a special report or even a white paper on case study writing or the process of creating impactful case studies. This is more of an advanced strategy. Don't feel you have to do this. It's going to take quite a bit of time to create some articles or a white paper on the topic.

But if you're serious about making a great living as a case study writer, I would consider doing this even if you do it over the long run and not right out of the gate. In fact, I would even wait a little bit if you're completely new to case study writing, and just focus on the other two credibility elements we've talked about.

If you're creating a special report already for a direct mail campaign, you can repurpose it here, so you don't need to reinvent the wheel or create something new. Or you can publish some of the sections of that white paper as short articles.

In terms of the topic, you can either research the topic of writing case studies or you can wait until you write six or so case studies, and once you have that experience under your belt, you can publish something that reflects your own approach to writing case studies or conducting better customer interviews or getting customers to agree to doing a case study and so forth. There are many different topics you could write about that are somehow tied to case study writing.

How can you get use out of these articles, a report or a white paper? There are many ways you could do it. You could post it on your website. You can use these pieces as part of a direct mail effort, which we've already talked about. You can approach industry blogs or newsletters about getting one of these or a few of these published on their website or blog in exchange for, of course, your name, a link to your website, and your contact information at the end of the article.

You can mail or email these pieces to prospects, clients or previous clients. It's a great way to nurture them, to stay in touch with them and stay on their radar screen.

You can ask some of your best clients if they'd be willing to forward one of those articles or white papers to one or more of their colleagues. It's a great way to get a referral. You're giving them something they can actually forward.

And you can include one of these reports or articles with your first case study quote to one of your prospects.

Basically, you can see that there are many, many uses for these pieces.  While it's a lot of work to get them written, they can be repurposed many times, so they really do pay off in the long run.

## Number 4

### Price it Right

Case studies, because they're so formulaic, meaning they follow a very standard format and don't usually deviate from that, can and should be packaged. By packaged, I mean that rather than having a wide fee range for these pieces as you would for white papers, web copy and other B2B marketing materials, you quote a standard fee.

For example, my local carwash has two main categories of service. They have express and they have full-serve. For each of those, they offer two different options. You could go with standard or gold. Standard express is your basic stuff.

Gold express, however, adds the hot shine car shield and a tire wax. Standard full-serve includes everything that express does, I believe, but then gold full-serve includes the works. We're talking the hot shine shield, tire wax, interior vacuum, clean windows, dust dash and console, exterior wash and towel dry. We're talking about a much more complete package. Basically, as a customer, you have four options when you go there and you know what you're getting with each option.

I'm not suggesting you treat your business as a carwash, not at all. You're obviously offering a much more professional and higher-priced service to an entirely different audience. But because case study projects tend to follow a similar format, and because you, as the writer, can decide to standardize how you approach and how you write these pieces, they present a great opportunity to make your pricing easier to understand.

Here's what I suggest you do. Rather than having a wide price range for case studies and then basing each quote on the specifics for that particular project – which, by the way, is the approach I promote when quoting other types of B2B projects – you're going to have two different service packages, if you will: standard and long. To get a better idea of what I'm talking about, you might want to go ahead and download and print the *Pricing Matrix* I've included in this module.

This is the way I price case studies. A standard case study can be either basic or complex. We're going to talk about what that means.

- A standard basic case study, I price it for $1,250
- A standard complex case study, I'll price it at $1,500
- A long basic case study, I'll price at $2,000
- A long complex case study will go for $2,250

These don't have to be the actual fees you start out with. I'm only using these as examples. These are professional-level fees for someone with experience writing case studies in the high-tech industry, which is the industry I focus on.

You can and should start lower if you have little or no experience writing case studies, and you should adjust these fees and fee levels based on your background, your experience, the niche you're going after, if any, and other important factors.

But the point is to have only four options. Here's why. Again, case study projects are formulaic, which means they're easier to quote on a flat-fee basis, as long as you also describe what the project scope includes and doesn't include. When I quote them, I talk about the length of the case study I'm going to be turning in, the number of interviews the project includes, the fact that I will be developing and including a high-impact title with the case study, and that I will write the callouts and the sidebar copy.

Prospects just like getting a flat-fee quote and a straight answer when they ask about fees. It allows them to better understand what you're going to do and for how much. That takes a lot of their natural anxiety away during this process because they'll be better able to determine if they can afford this service from you.

That's the next important reason why this service package approach works so well. It allows you to screen prospects quickly by quoting a fee in that initial call because you'll know very quickly after asking a few questions where in that pricing matrix their case study is going to fall under. Plus, it's easier to quote. It gives you a faster selling process. There's less back and forth. Based on what they tell you about their project, you'll be able to know how much you're going to quote for it, and you can even give them that price there in that initial conversation and determine if they can afford you.

As far as the factors that move the needle, so to speak, between the basic and "complex" range of your pricing, **here's what I look for**:

- ***Length*** – that's an obvious one, right? If we're talking about a basic 800- to 1,200-word case study, it's going to fall into that standard column.
- Longer than that – say 1,200 to 2,000 words – you don't usually see case studies that long anymore. *They usually cap out at that 1,200-word range.* It used to be a few years ago they were longer. They ended up being

four pages laid out. Most case studies today are one to two pages. But if, for some reason, the client really wants a longer piece, I have a column for that. That's my long case study pricing range.

- The ***complexity of the story or the product used*** or that we're talking about, that's another important factor that I consider.
- The ***number of interviews that I'm going to have to conduct*** and who I'll need to interview.
- ***The number of people that are going to be involved in the revision process.*** That's why I ask that question early on. I want to know if I'm getting into a situation where a lot of people are going to provide feedback, or if we're just talking about one or two people that are going to give me that feedback and we're going to be dealing with minimal edits.
- ***Turnaround time expectations*** – if this is a rush project, I will probably price it a little bit higher, but usually I set that turnaround time and I try to get the client to understand that that's the best I can do. I rarely do a rush job and charge higher for it. I know some writers do that. I personally prefer not to have a rush category.
- ***The number of projects they're giving me all at once*** – if we're talking about someone who's going to give me a contract and go ahead and pay me for six case studies, I'm going to offer a bit of a discount on that based on the workload.
- ***The potential for future work*** – if I see that this is onetime shot, this is just a onetime project and there's probably not going to be much more of anything down the pike, that's going to affect where this project falls. But usually I'm looking for clients that have more than just one project, so that's usually not something I consider, but it could be something that I'll look at if I'm talking to someone who doesn't seem to have a lot more for me.

**A few suggestions:**

- First, never tell the client that their project is "basic" or "complex." Those are internal category names for your use only. Once you've gathered the information that I've just discussed, you're simply going to say something like, *"Mr. Prospect, for a case study of that nature, I have a standard flat fee of $1,500."*

- The second point is not to post these fees on your site. You want to talk with a prospect and address any questions, objections and misunderstandings in a conversation, not over email or by posting that information online. Plus, you want the chance to understand what they're looking for and to position yourself as a great choice. You can't expect your website to do it all. It's only there to pique enough interest and to create enough of a comfort level to contact you. From there, it's really up to you to sell yourself and your services.

- Finally, many case study writers offer the customer interview as an add-on, meaning they quote the project itself without the interview, and then they offer the interview as a separate fee and line item in their proposal. They might still quote a total fee that includes the interview, but they'll itemize that fee within their quote or estimate.

Personally, I don't like doing that and here's why. When you do that, you call attention to the interview and the cost of doing that interview. That will cause some clients to say, "Hey, I'll go ahead and do the interview and just send you the recording." The problem with that is that you still have to listen to the interview, plus you don't know how good a job they're going to do on that interview and that may very well cause you to have to interview someone else in the company after you listen to it just to get clarification or to fill gaps of information.

To me, not doing the interview is not really a timesaver, so I just list it as part of what the package includes, but I don't let the client remove it from the scope of work in order to save a few bucks. When and if they try to do that, I explain that the fee will not change as a result of them going ahead and doing the interview on their own because there's still a lot of work to do with that information, even if I don't lead the interview.

One final piece of advice when it comes to promoting yourself as a case study writer: **never stop marketing and**

**never stop promoting.** Make it a habit to spend at least 10% of your workweek promoting your services. And if you're just starting out, marketing should be pretty much your full-time job until you land your first client.

## Summary

This completes **Module 7**. Again, the key elements of successfully landing case study projects are:

1. Position yourself as a case study writer in all of your marketing communications and discussions.

2. Go after high-probability prospects and the right individuals within those companies.

3. Show credibility through good case study samples, through testimonials and, if possible, a few articles or even a special report or white paper on some aspect of case study writing or case study marketing.

4. Know how to package and price case studies in a way that makes it easier for the client to say yes. Specifically, go with a "service package" approach rather than having a fee range and then quoting a number somewhere within that wide range. A service package helps make your case study services much more tangible and it makes it easier for the client to say yes. Plus, it also focuses the client's attention on the value you bring to the table and on everything that's included in that package rather than on the actual fee.

That's it for **Module 7**. There's a lot of material here, so my recommendation would be to listen to this module a couple of times and try not to do all of it at once. Use your transcript as a guide and create an action plan to start implementing these ideas over the next few weeks or months, depending on your goals.

Whatever you do, though, don't feel like you have to learn to master case studies before you start looking for case study clients. The best way to learn is to just learn as you go, and as you land case study projects, come back to this program and use it as your guide to help you complete your projects.

I'm telling you – before you know it, you're going to be up to speed, writing powerful case studies for great clients and earning a great living doing so. I hope you get to tell me all about it one day when we meet in person. *Until then, stay focused, believe in yourself and have fun!*