

Write Captivating Case Studies in Three Simple Steps

By Jonathan Kranz

Case studies are the written equivalent of the in-person demonstration, an opportunity to illustrate your product or service in action. The more complex or abstract your offer (attention all “solutions providers” out there) the more valuable your case studies become: their specificity has the power to cut through the fog of business rhetoric. Better yet, they allow your prospects to see themselves in your customers’ shoes, encouraging them to imagine what it would be like to enjoy the benefits of working with you.

You can think of the case study as a cross between the testimonial and the business article. Like the testimonial, the case study features a satisfied customer who “speaks” on your behalf. Like the article, it’s structured dramatically, with a clear beginning, middle and end that holds your audience’s attention through the tension of conflict and the anticipation of resolution.

In format, the case study is simplicity itself. Many are limited to just one page -- a brevity that makes them especially useful as trade show handouts, direct mail inserts, supplemental pages to Web sites, and as sales collateral that can be faxed to hot prospects. Most are conveniently divided into three or four labeled sections that telegraph the case study structure to readers, guiding them quickly to the happy ending. These labels go under any number of names, but for our purposes, I’ll stick to three: Challenge, Solution, Result.

The Challenge: Setting up the problem and the stakes

Think of The Challenge as the first act in a three act opera: This is the place to set the scene, introduce the lead characters, and present the problem or challenge that puts your story in motion. Articulating the character and context is easy -- just state the facts: “Widgets, Inc. is a \$50M industrial design firm serving extrusion plastics concerns in the southern United States.”

For the challenge itself, present both the problem to be solved (or the opportunity that may be reached) *plus* the stakes -- the reason why the problem or opportunity matters. It’s not enough to say that Widgets, Inc. had an inefficient project management system. So what? You need to articulate the meaning of the challenge to the customer, whether it’s a negative consequence to overcome, or a positive outcome that might be gained:

Negative: “Widgets CFO Lex Palmer estimates that the company lost approximately 25,000 man-hours a year -- or \$1,875,000 in wasted resources -- through the mismanagement of project-team time, talent and focus.”

Positive: “According to Widgets engineer Rufus Manchester, a fifteen percent improvement in management efficiency would cut the average project time from six weeks to four, and lead to \$0.75M to \$1.25M in additional profits for the company.”

The Solution: Putting your services on stage

In the middle or second act of your study, the Solution, you introduce the hero: The product or service your company provides that solves the customer’s problem or helps them achieve their goals.

Here, your objective is to paint a picture, to illustrate the solution so graphically readers can “see” the evolving events in their imagination. Specificity is critical: Every detail you contribute makes the solution more tangible, more real. That’s why a broad, vague assertion is insufficient:

“Widgets, Inc. deployed the ProjectMaster solution across its departments.”

Instead, build the description piece by piece:

“First, the ProjectMaster team of workflow analysts, IT network developers, and systems engineers spent a week on-site analyzing Widgets’ work processes. The team’s subsequent report, reviewed by senior managers at Widgets, formed the basis for a new workflow design. ProjectMaster recommended a wireless networking infrastructure, new collaborative management software applications, and a set of specific policies -- tailored to Widgets’ unique circumstances -- to reduce meeting times and streamline product development. After a one-month trial period with one Widgets department, ProjectMaster deployed the complete solution across the entire enterprise, and established regularly reporting protocols to monitor progress and make adjustments, as required.”

The Result: Making the payoff

At this point, your case study should positively tremble with tension. The Challenge established a conflict between “what-is” and the desired “what-could-be.” Then the Solution detailed a response to the Challenge. Now every reader will want the payoff: Did the Solution work? And what change did it bring about?

The Result is, as its name suggests, an articulation of the results; your job is to present the consequences of the Solution. As you had in your description of the Solution, make the Result as specific and detailed as you can. If possible, quantify the results with numbers, perhaps with an amount of money saved (or earned), a percentage increase in productivity, or a dramatic reduction in time or waste.

But whenever possible, put the most important result in your client’s words. If you can get permission to use a direct quote, use it -- it’s the most credible source of information. A great Result quote might look like this:

“In just six months, we cut our average design-to-implementation time from six weeks to seventeen work days,” says Bill Sharpton, Widgets COO. “With ProjectMaster in place, we’re on track to realize an additional \$1M in profits this year and an additional \$2M next year.”

Do your homework and the writing will follow

As you can see, the case study is a simple format that packs a lot of punch in a small space. For maximum impact, invest most of your writing time in research -- gathering the facts and quotes you need to give your case immediacy and credibility. Once you have your basic information in front of you, the 3-step structure makes the writing itself fast and painless.

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jonkranz@kranzcom.com.