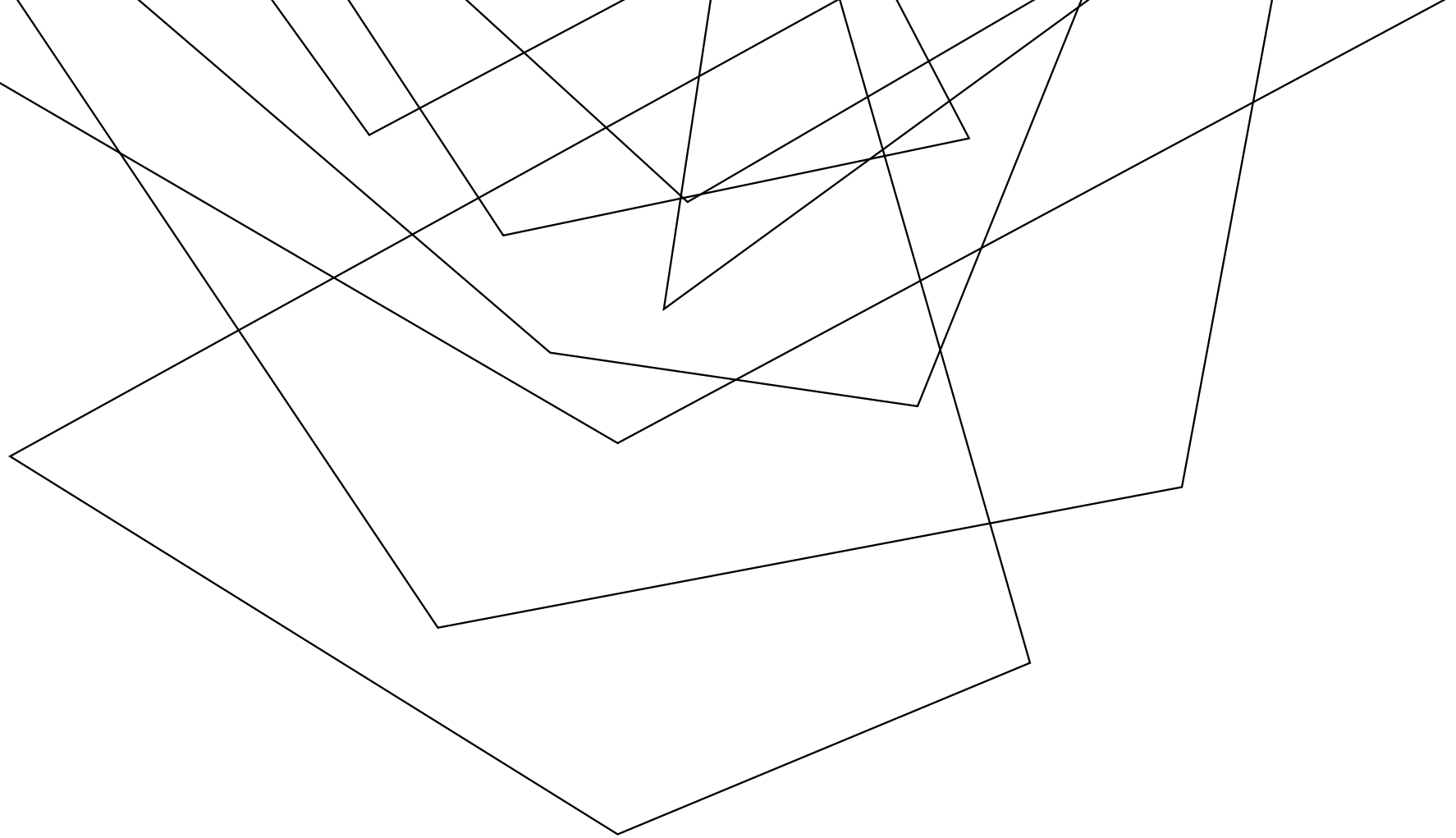


STORIES THAT SELL: HOW TO CREATE CASE STUDIES THAT DRIVE ROI

7+ YEARS.
300+ COMPANIES
1,500+ STORIES.

WHAT DO THE BESTDO TO...

- Tell stronger stories?
- Scale their production?
- Improve their buy-in rates?
- Get their teams aligned?

SHIFTING OUR THINKING

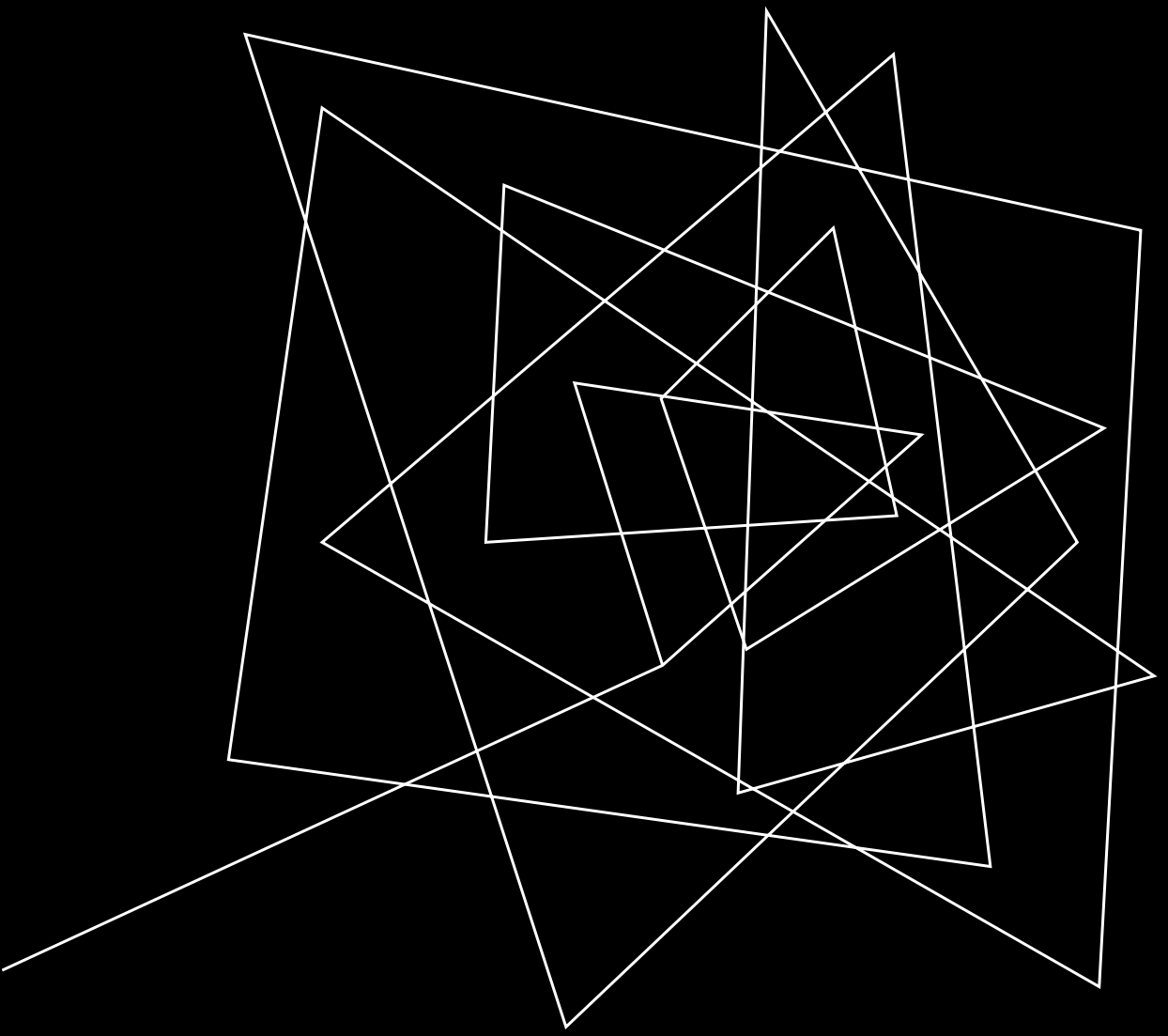
- **Incidental → Strategic**
  Planned and intentionally curated.

- **Marketing project → Organization-wide**
  Case studies are a team sport.

- **Sporadic → Systematic**
  Curate and choose stories vs. relying on volunteers.

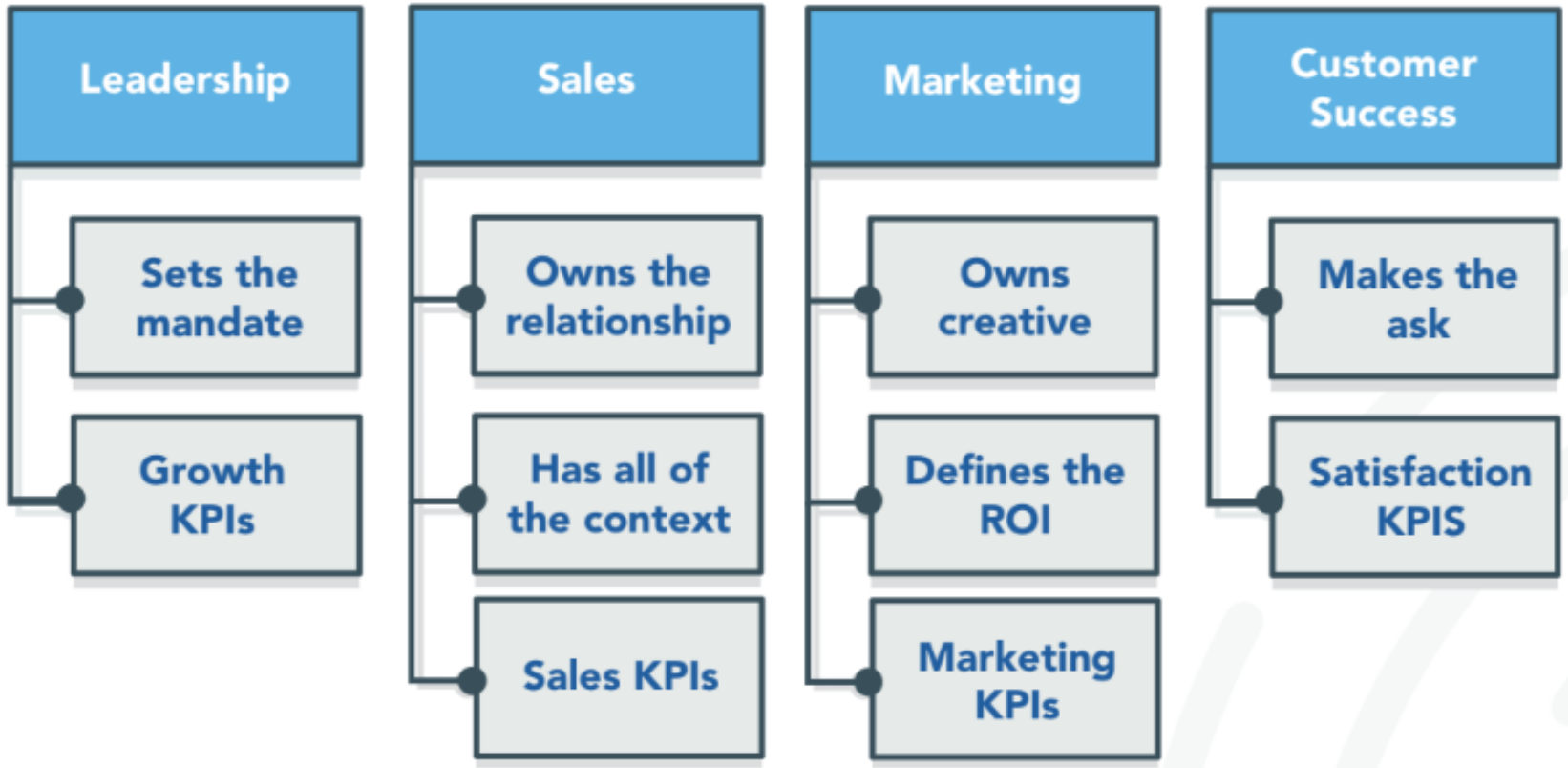
- **One story, one time, one way → A campaign**
  Repurposed for different media, goals, channels

- **Reactive → Proactive**

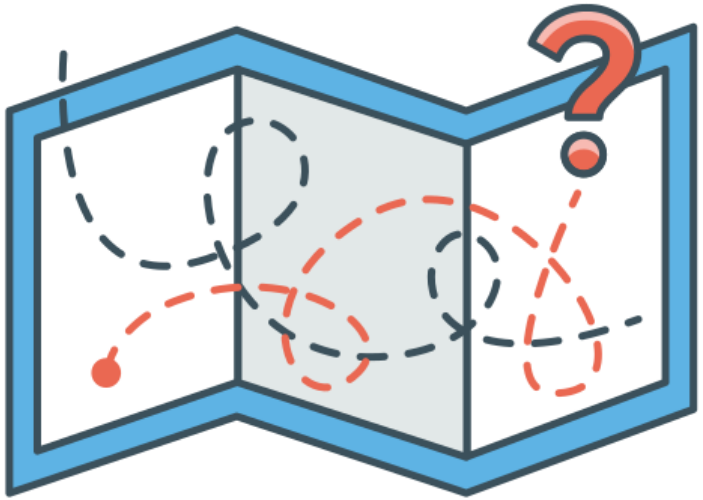


#1. GET YOUR HOUSE IN ORDER.

THE PROBLEM:


Leadership
Sets the mandate
Growth KPIs
Sales
Owns the relationship
Has all of the context
Sales KPIs
Marketing
Owns creative
Defines the ROI
Marketing KPIs
Customer Success
Makes the ask
Satisfaction KPIS

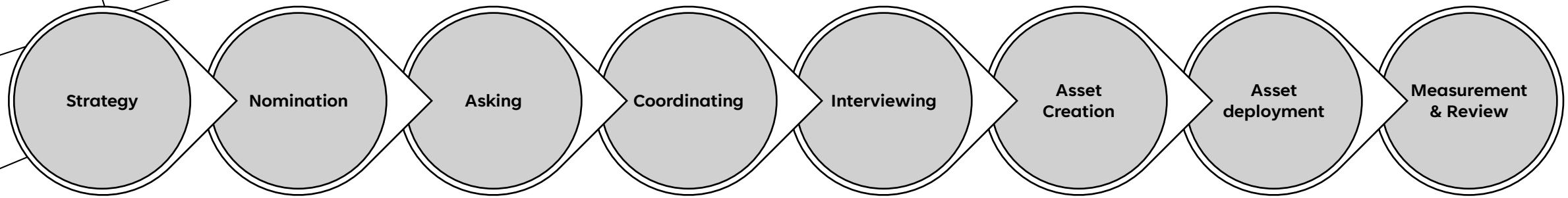
ADVOCATES FROM ALL AREAS ALIGNED ON…



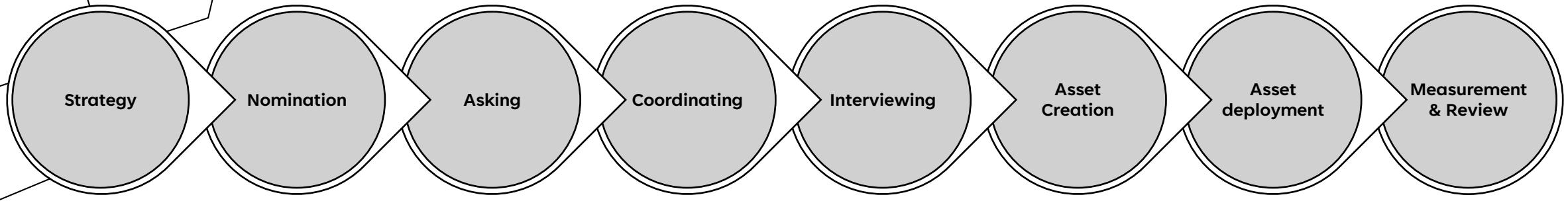
1. **Goals:**
    - What does ‘success’ look like?
    - How will we track it?
2. **Formats:**
    - What serves each team best?
    - Where will they ‘live’?
    - How will we categorize?
3. **Process**
    - Identification → Final deployment
4. **Accountabilities**
    - Who does what?
    - Who has final say? (Drafts? Strategy? Etc.)
    - What timelines are reasonable?

https://casestudybuddy.com/blog/how-to-get-your-sales-team-to-help-with-case-studies/

OWNERSHIP & ACCOUNTABILITY



OWNERSHIP & ACCOUNTABILITY



- Goals
- Coverage Gaps
- Form factors
- Ideal KPIs

- Identify
- Validate
- Establish Context

- Contact
- Expectation setting
- Handoff

- Project management
- Scheduling
- Securing release
- Client Experience

- Prepare
- Conduct
- Proliferate

- Drafting
- Revisions
- Approvals

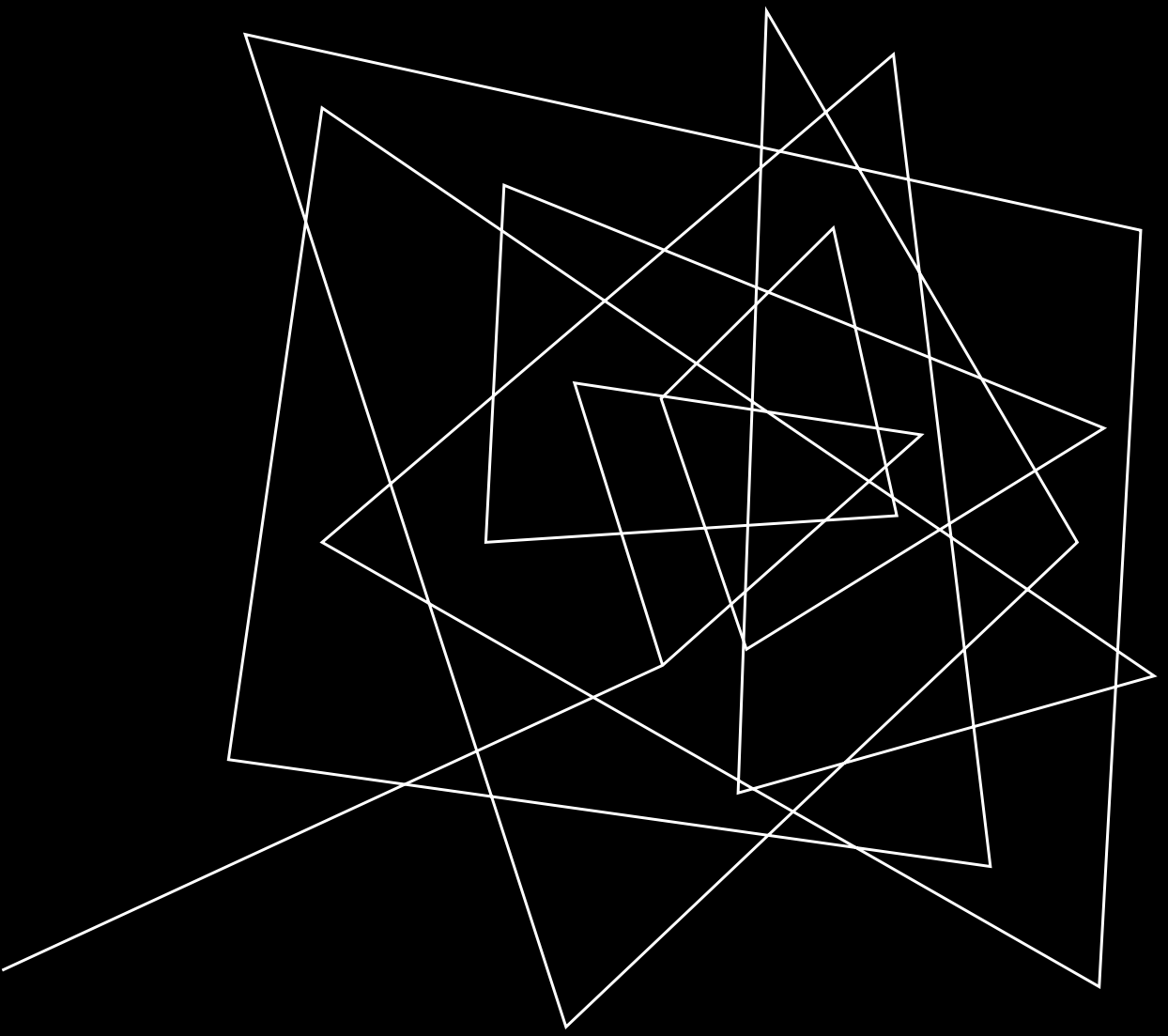
- Catalogue
- Coordinate
- Disperse

- Report to leadership
- Ongoing refinement

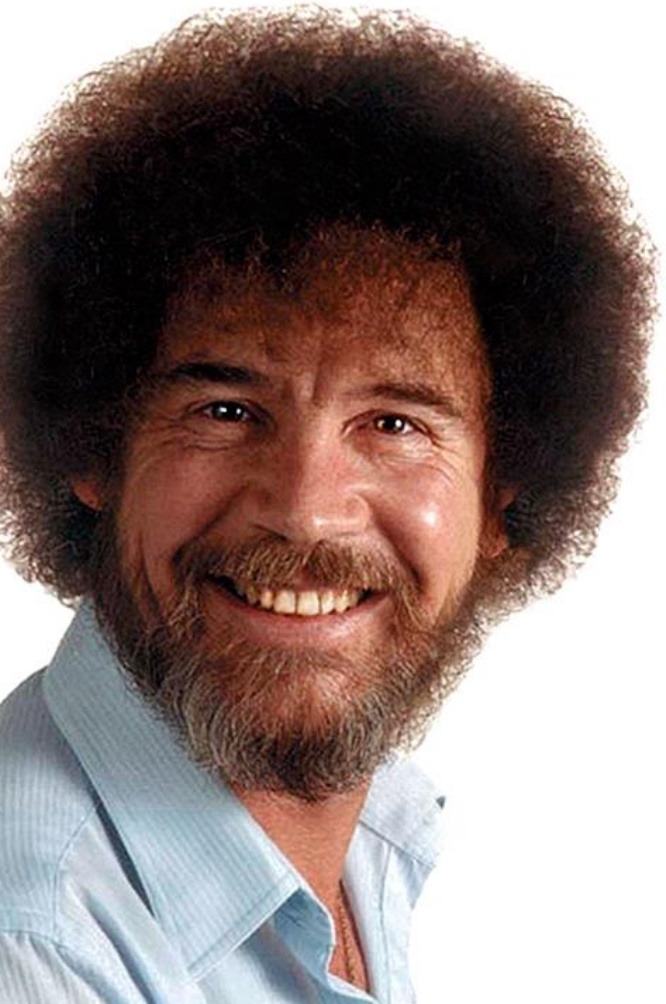
Stage	Owner	Timeline	Dependencies	Resources	Notes

TOP TAKEAWAYS:

- Establish clear ownership and accountabilities
- Create ongoing internal feedback loops
- Optimize for the outcomes of every team
- Involve (and get the support of) leadership



#2: SET YOUR STRATEGY, PUNK.



‘HAPPY ACCIDENTS’ ARE NOT A STRATEGY.

– BOB ROSS, MAYBE

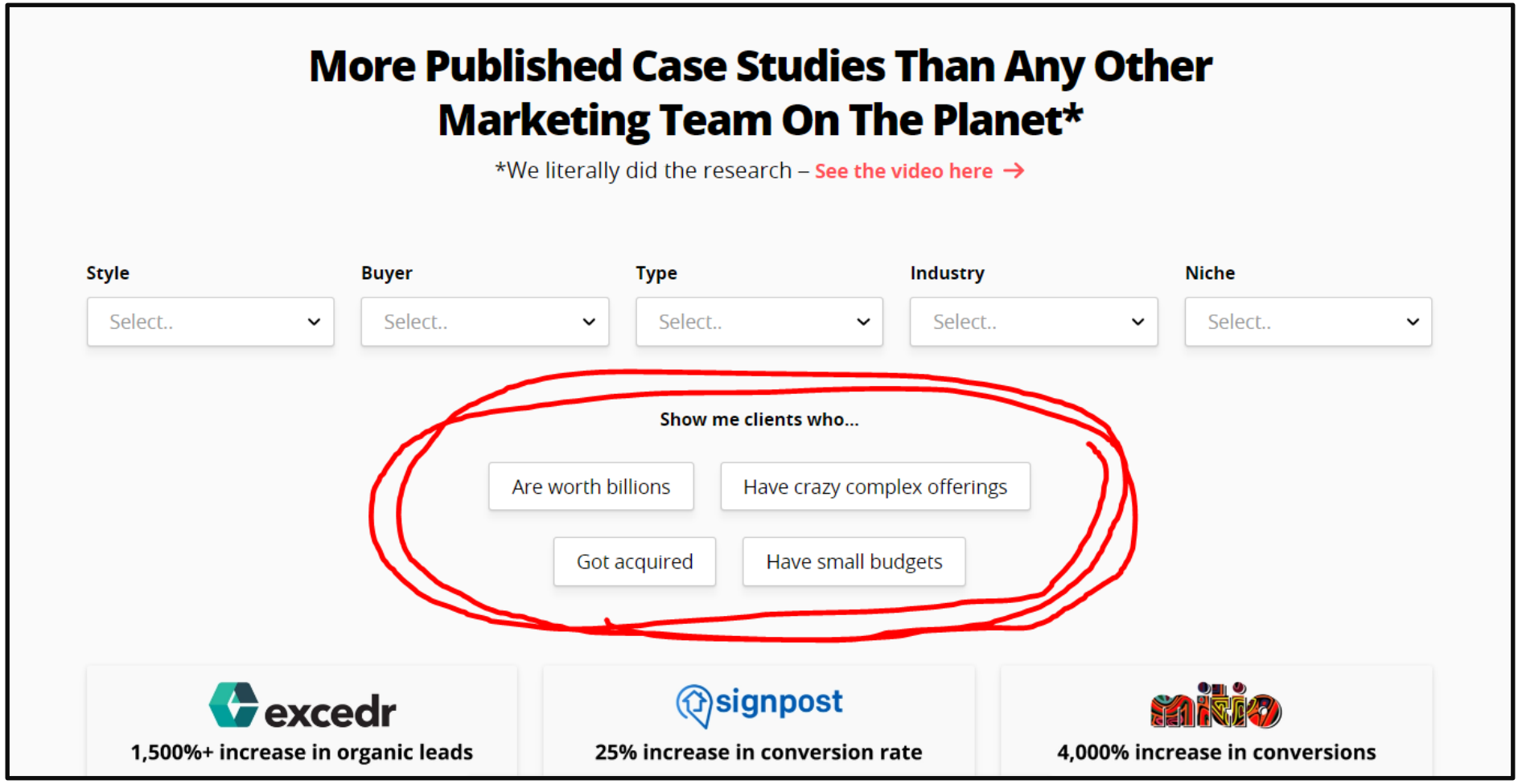
Case Study Buddy

WHY DO PEOPLE CONNECT WITH A CASE STUDY?

Marketers think leads want...	Leads really want...
Big logos	
Huge metrics	
Glowing, perfect quotes	
Trade secrets	
High polish	

WHY DO PEOPLE CONNECT WITH A CASE STUDY?

Marketers think leads want...	Leads really want...
Big logos	Relatable
Huge metrics	Aspirational
Glowing, perfect quotes	Credible
Trade secrets	Prescriptive / Informational
High polish	Compelling


More Published Case Studies Than Any Other Marketing Team On The Planet*
*We literally did the research – See the video here
Style
Select..
Buyer
Select..
Type
Select..
Industry
Select..
Niche
Select..
Show me clients who...
Are worth billions
Have crazy complex offerings
Got acquired
Have small budgets
excedr
1,500%+ increase in organic leads
signpost
25% increase in conversion rate
4,000% increase in conversions

WHAT ARE YOUR COVERAGE GAPS?

- **Industry/vertical?**

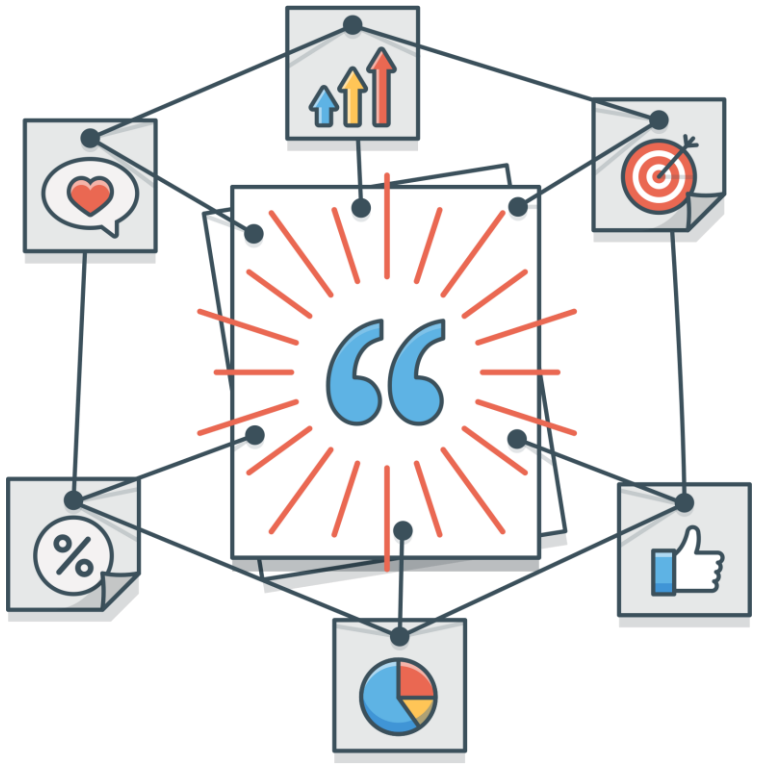
- **Benefit/feature?**
  E.g. Aspect of product/product suite, etc.

- **Buyer type/role? (CTO, CMO, 100+ sales seats, etc.)**

- **Objection/criteria?**
  Repurposed for different media, goals, channels

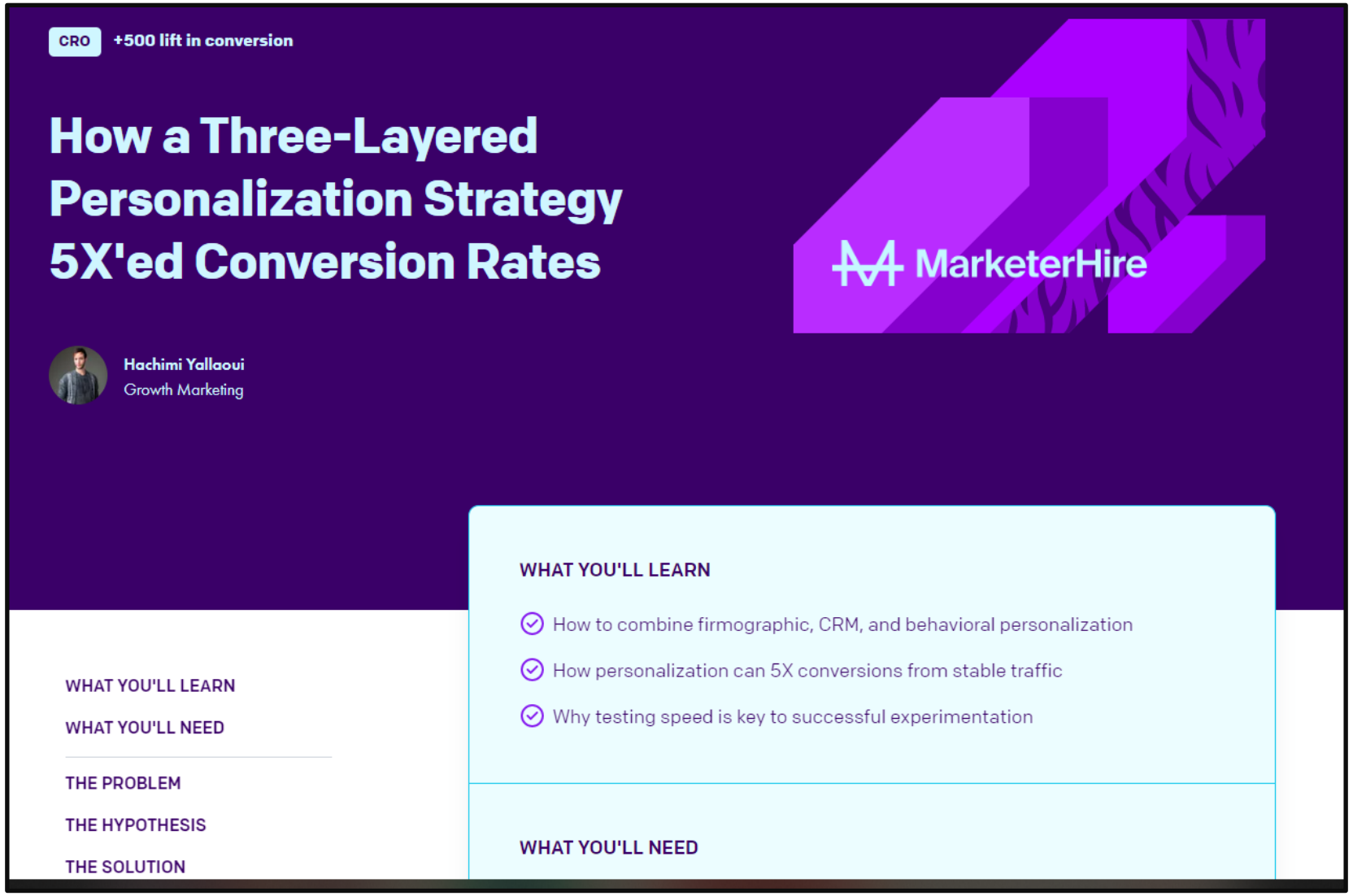
- Talk to sales & leadership; look at your marketing campaigns.
  Root in real business/revenue goals!

WHAT STORIES SHOULD YOU TELL?



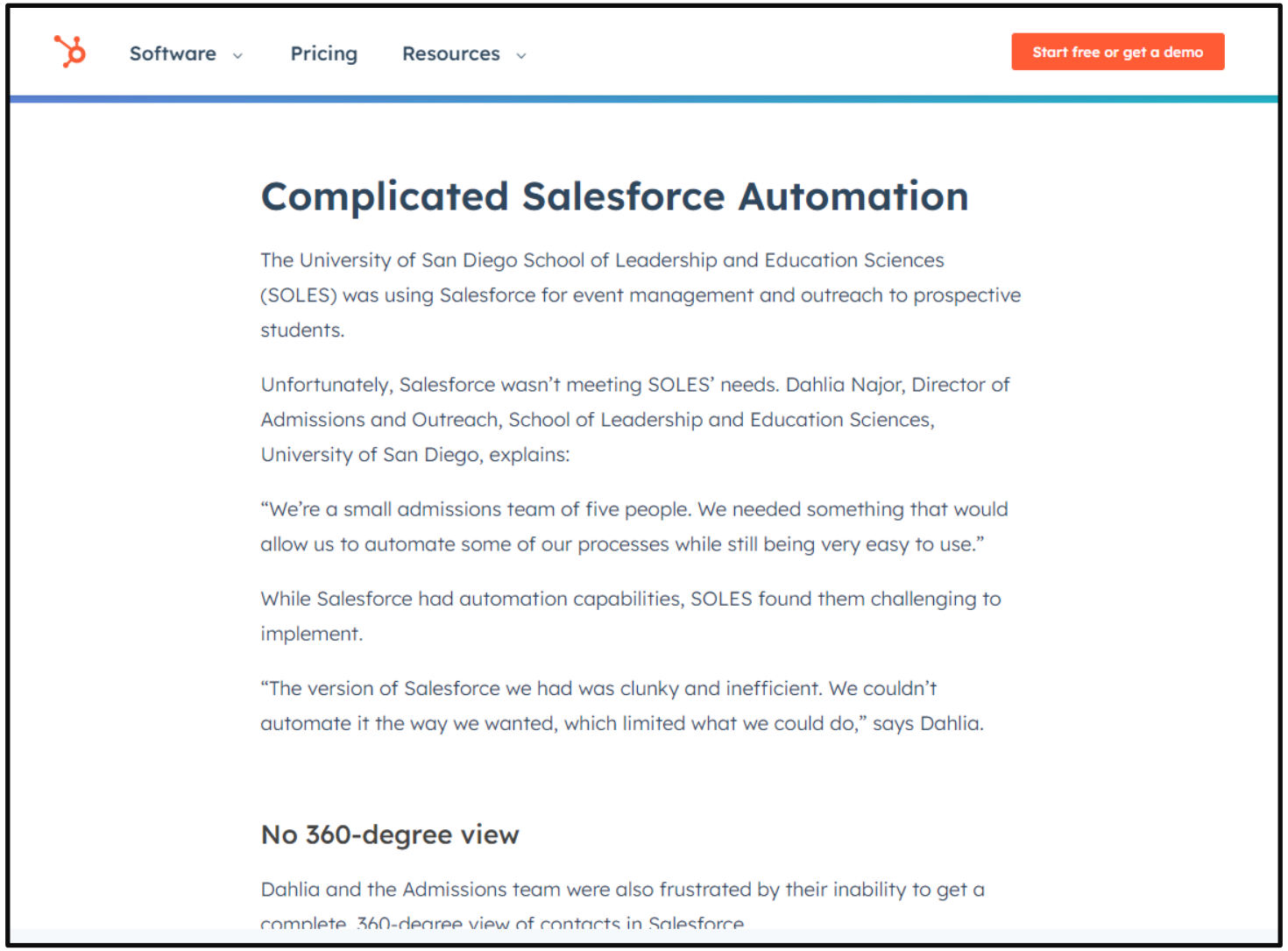
1. **Switcher:** Left competitor for you
2. **Upgrader:** Expanded service/product and benefitted
3. **Disambiguator:** Demonstrate a use case
4. **Buying Board:** Appeal to specific roles/board as a whole
5. **Playbook:** “Here’s how to do X based on Y”
6. **Skeptic:** A tricky client who almost didn’t convert
7. **Implementation:** Set expectations for setup and change
8. **Problem Solver:** A client where you turned things around
9. **Subset:** Focus on an individual feature/sub-product
10. **Profile:** “Who are the kinds of people who choose X?”

PLAYBOOK



https://www.mutinyhq.com/playbooks?filter=mutiny

SWITCHER



https://www.hubspot.com/case-studies/university-of-san-diego

DISAMBIGUATOR

POLAR INDUSTRIAL PLASTICS: A SAFE SOLUTION FOR FIBERGLASS FINE GRINDING DUST

Client: Polar Industrial Plastics, Ltd.
Featured Solution: Vortex
Industries: Bulk & Powder, Fiberglass, Piping, Plastic
Applications: Fiberglass, Grinding

Polar Industrial Plastics Ltd., located in Edmonton, Alberta, makes high-performance piping systems and other industrial components out of plastic and fiberglass. They came to RoboVent in the winter of 2015 to address air quality issues in their fiberglass fabrication facilities.

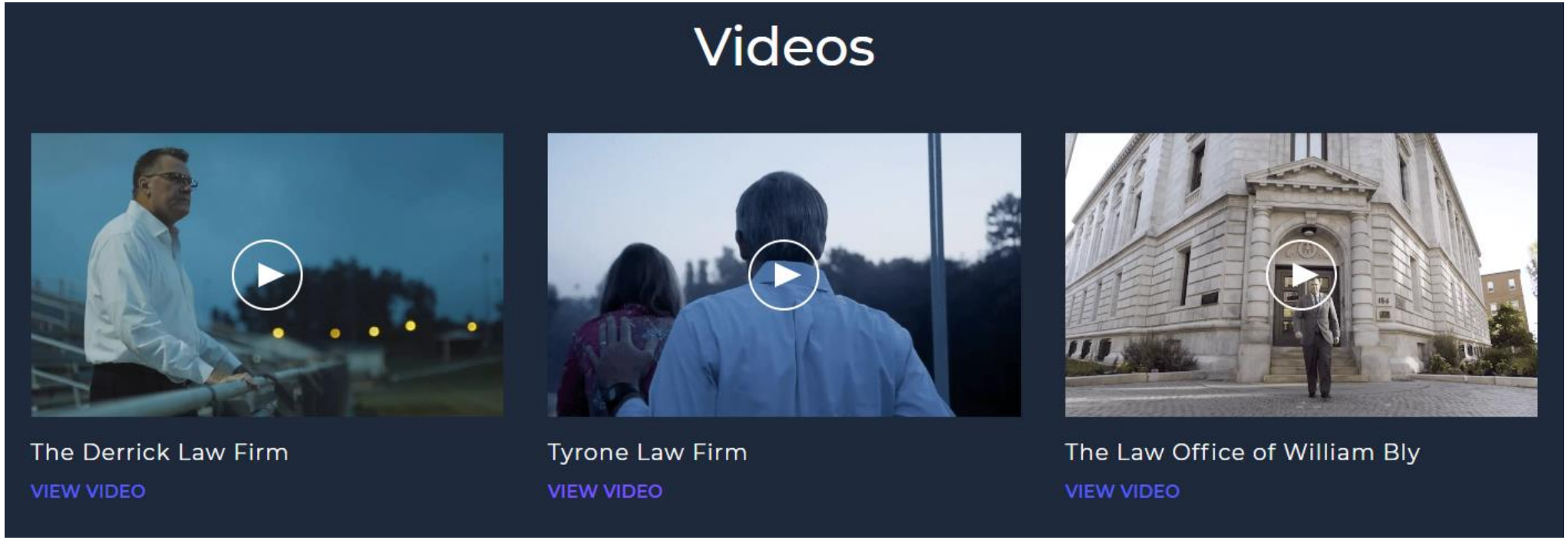
The Problem
In order to bond fiberglass, workers must first sand it to roughen the surface. This creates a fine dust that can cause inflammation and reduce lung function when inhaled. The dust also gets everywhere, creating a work area that is both visually unappealing and uncomfortable.

Powerful Air Cleaners Enable Safer Workouts in the COVID Era

New Species CrossFit is a CrossFit affiliate gym in Royal Oak, Michigan. After the COVID-related shutdowns in the spring of 2020, owner Josh Hunnicutt knew he needed a strategy to protect and reassure skittish patrons when gyms reopened. A powerful portable air filtration system from RoboVent enables him to keep his gym open safely and reduce the risk of spreading the coronavirus.

https://www.robovent.com/learn/case-studies/

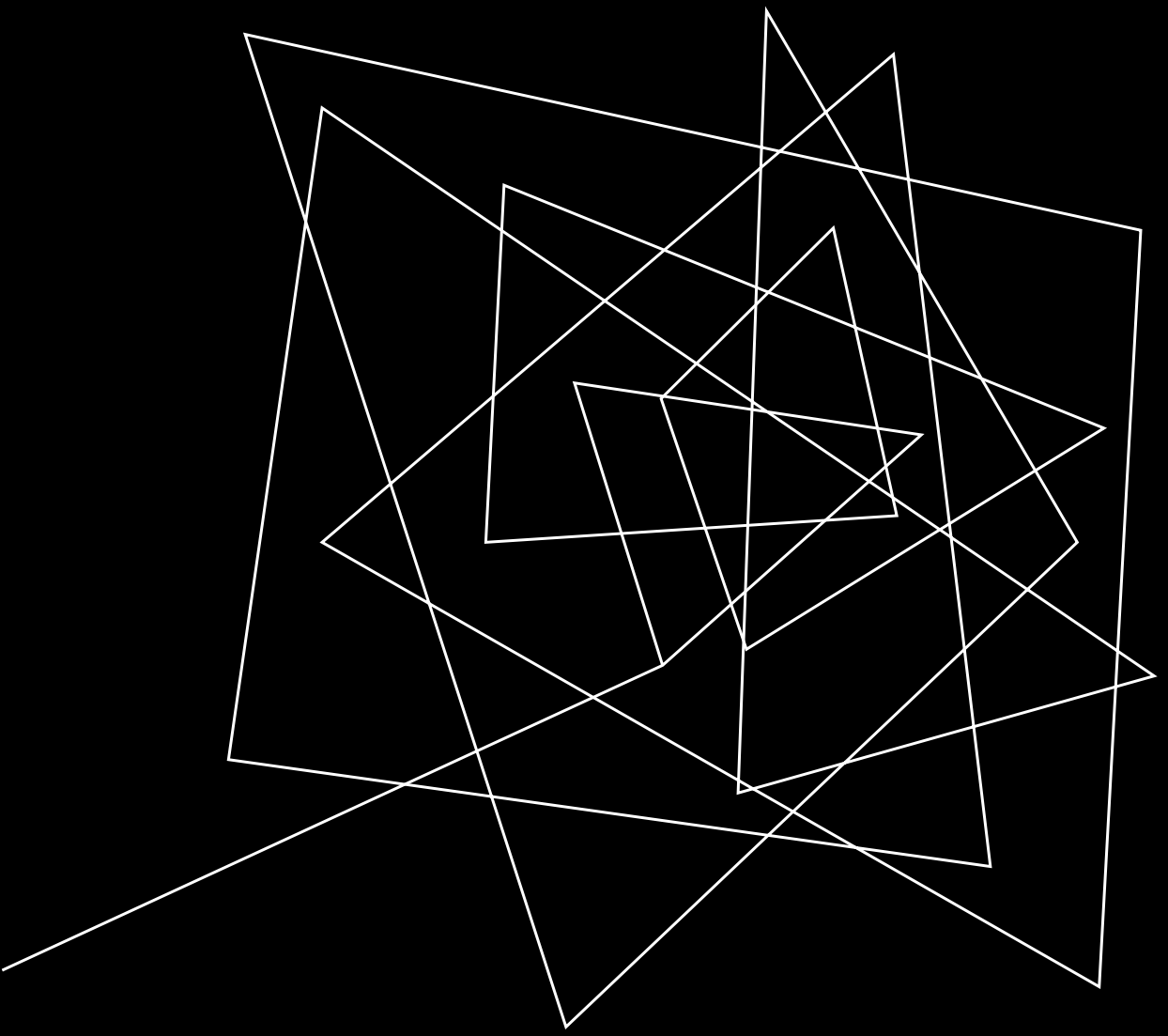
NO METRICS



https://crisp.co/video/

TOP TAKEAWAYS

- Consult all departments on coverage gaps/needs
- Align stories with real-world business/revenue goals
- Map out the KPIs they intend to capture for each
- Intentionally curate stories based on this plan



#3: PROSPECT VS. PROCRASTI-WAIT

ESTABLISH SHARED CRITERIA.

“This is who we’re after. This is what a win looks like. This is when and how to ask.”

Requirements

- Customers must be willing to say that they are using Lakehouse
- Customers must be using Databricks for both analytics and ML workloads for a more robust story
- Customers must have more than one business use case to share to show that Databricks is critical to their business operations
- Customers must be willing to share business impact stats
- Customers fall within our target industries
- Customers are [illegible] Enterprise, or Digital Native (Exception: emerging markets that don't have any stories)

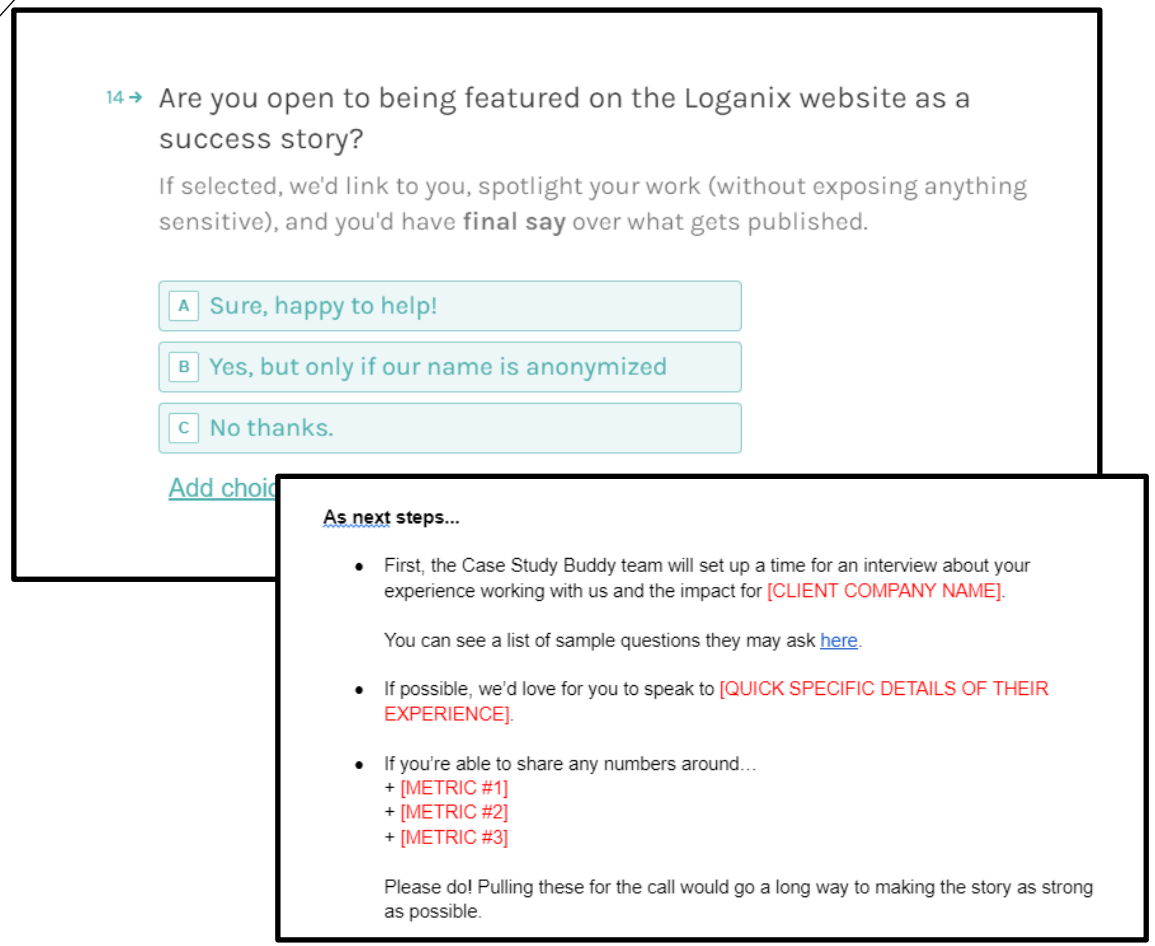
Key Themes

- **Lakehouse**: Relating to a new data management paradigm that combines the capabilities of data lakes and data warehouses, enabling BI and ML on all data. You want to emphasize how they are using the Lakehouse platform to access all data and perform all forms of analytics and ML on that data.

- **Data team collaboration**: Relating to how Databricks provides one common platform and data set for all personas, and fosters collaboration between them.
  - If possible, try to interview one data scientist and one data engineer for the case study, even better if you can get an analyst

- **Using data and AI to solve a tough problem**: Relating to how Databricks helps to support a company to achieve their core mission or a key strategic imperative.
  - Large enterprise
    - Often, but not exclusively focus on scale, security, performance narratives
    - Use case examples: customer experience/personalization, risk mitigation/fraud detection, large scale demand forecasting
  - Mid/Commercial
    - Often, but not exclusively focus on inspirational, "using AI for good" narratives
    - Use case examples: energy efficiency/climate change, patient research/outcomes, workplace safety

PROACTIVE PROSPECTING



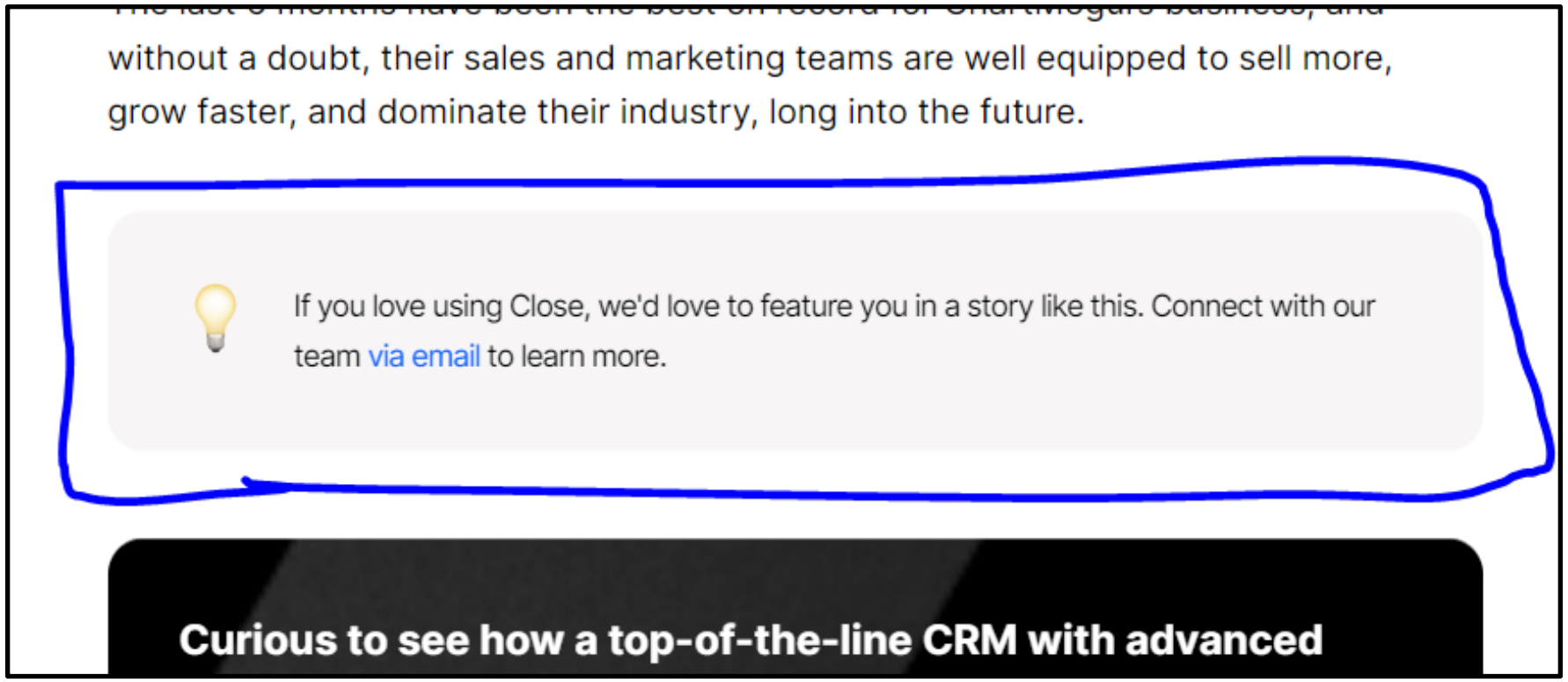
- **Audit client database for ideals**
  Proactively and intentionally flag ideal targets who fit gaps and likely have data

- **Leverage surveys and escalating commitment**
  Opportunity to discuss feedback, impact, or even present the ask

- **Standardize how you ask and prime**
  Provide templates and steps to recognize and report wins/request involvement

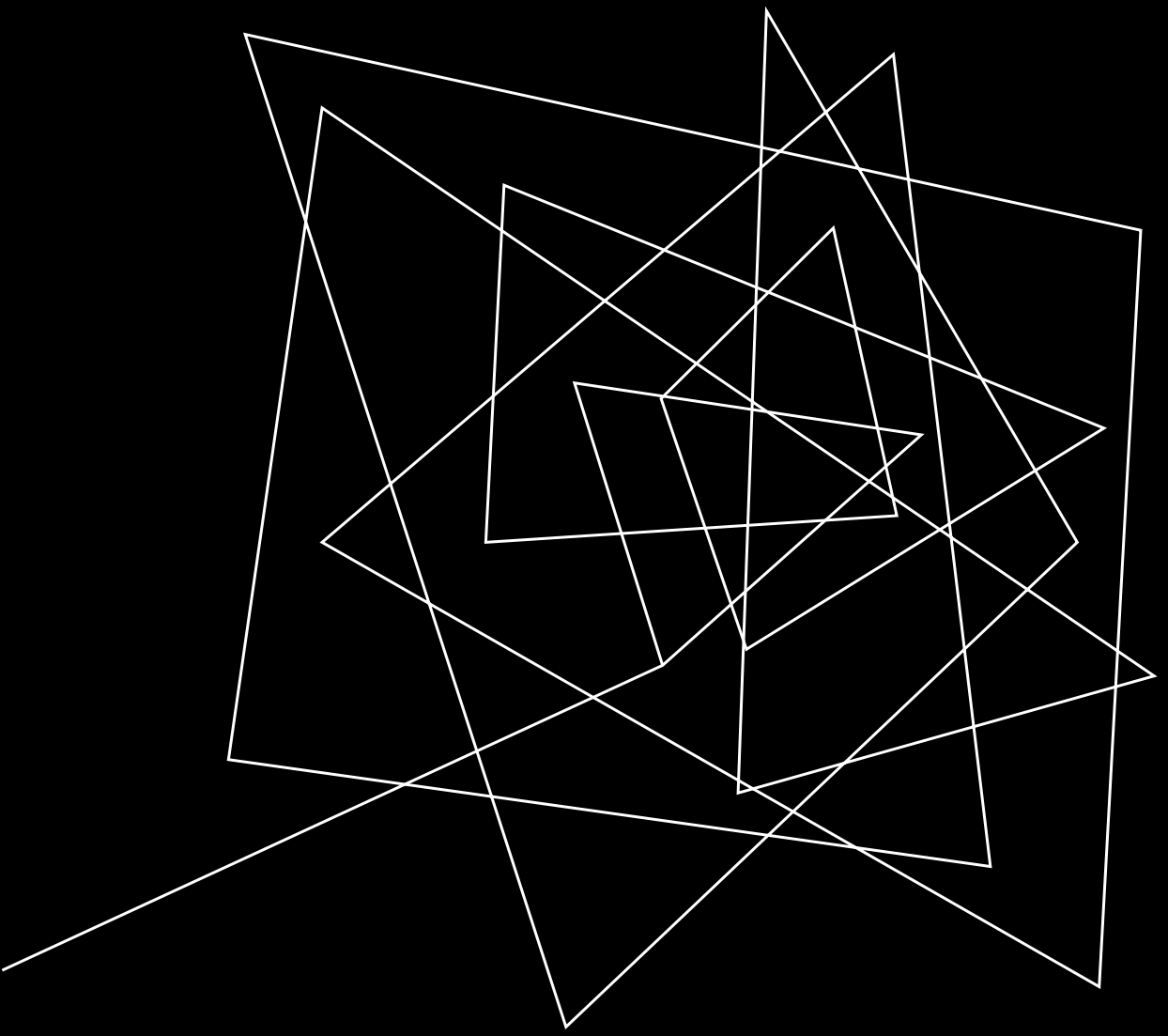
https://casestudybuddy.com/blog/how-to-get-clients-to-agree-to-be-in-case-studies/

PULL / PUSH


without a doubt, their sales and marketing teams are well equipped to sell more, grow faster, and dominate their industry, long into the future.
If you love using Close, we'd love to feature you in a story like this. Connect with our team via email to learn more.
Curious to see how a top-of-the-line CRM with advanced

TOP TAKEAWAYS:

- Align prospecting to coverage gaps
- Leverage existing conversations
- Hold teams accountable
- Provide STRUCTURE



#4: MAKE A BETTER ASK.

Expectation-setting creates, and solves,
the toughest problems in case studies.

- Poor buy-in (int. and ext.)
- Lack of proper release
- Unclear process/false promises
- Weaker story (fewer metrics, details, etc.)
- No learning, refinement, or longevity

Case study killers:

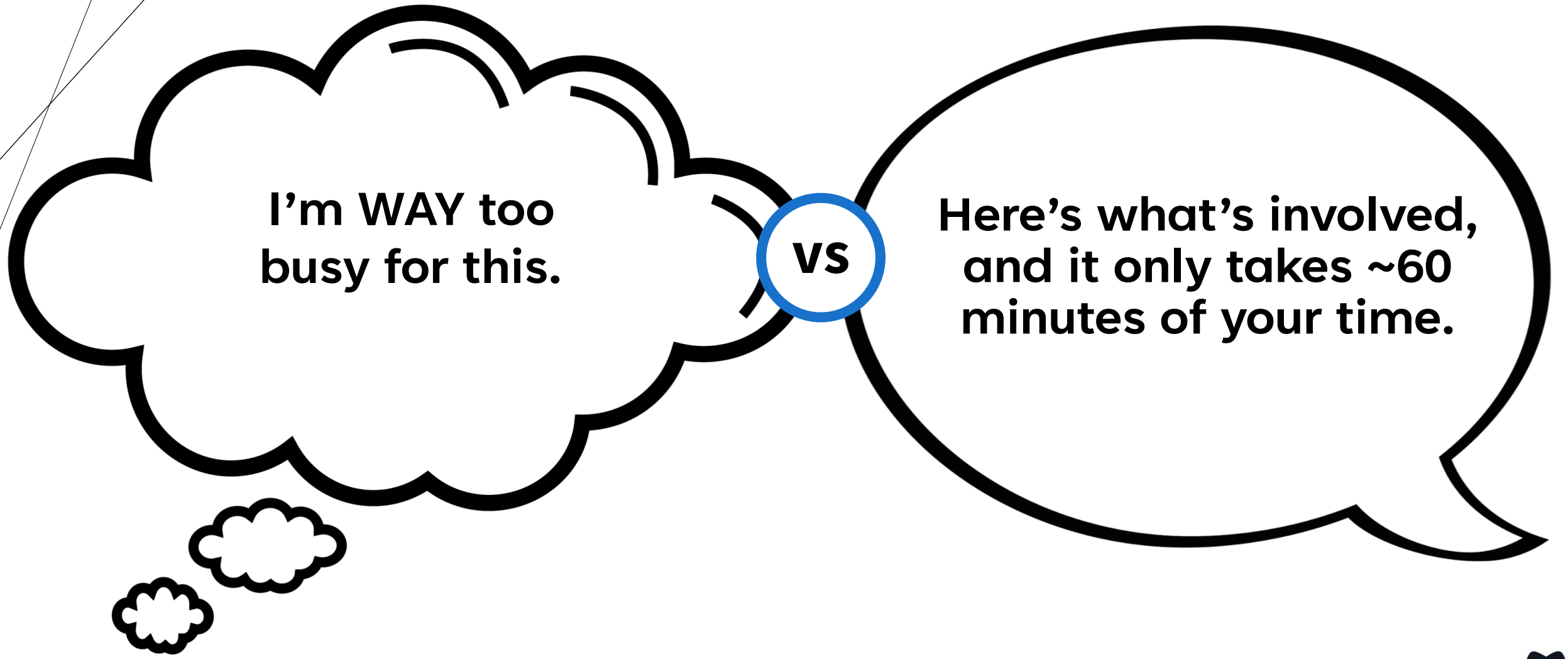
- Uncertainty
- Inconvenience
- Selfishness

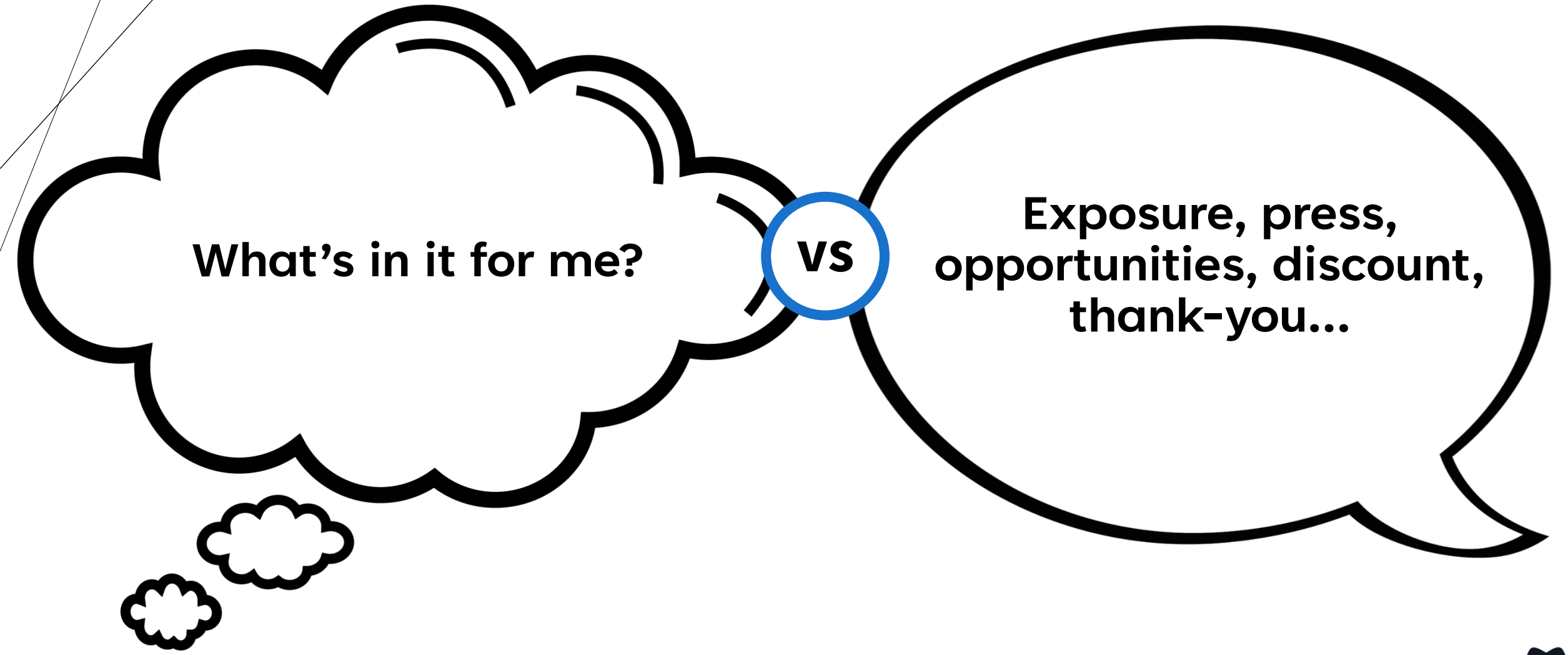
We’re worried about being exposed to competitors.

VS

Nothing will be published without your approval.

You have final say.


I’m WAY too busy for this.
VS
Here’s what’s involved, and it only takes ~60 minutes of your time.


What’s in it for me?
VS
Exposure, press, opportunities, discount, thank-you...

A GOOD ASK TEMPLATE...

Hey [Customer Name],

Last [week/month/quarter], we achieved [milestone/result].

We're incredibly excited to see those results; these are the sorts of wins we love to hear about.

In fact, we think others would love to hear about them, too.
If you're willing, we'd like to create a spotlight piece for our website with you as the hero.

All we need from you is a few quick questions answered on a short call—and a final sign-off before we go live.

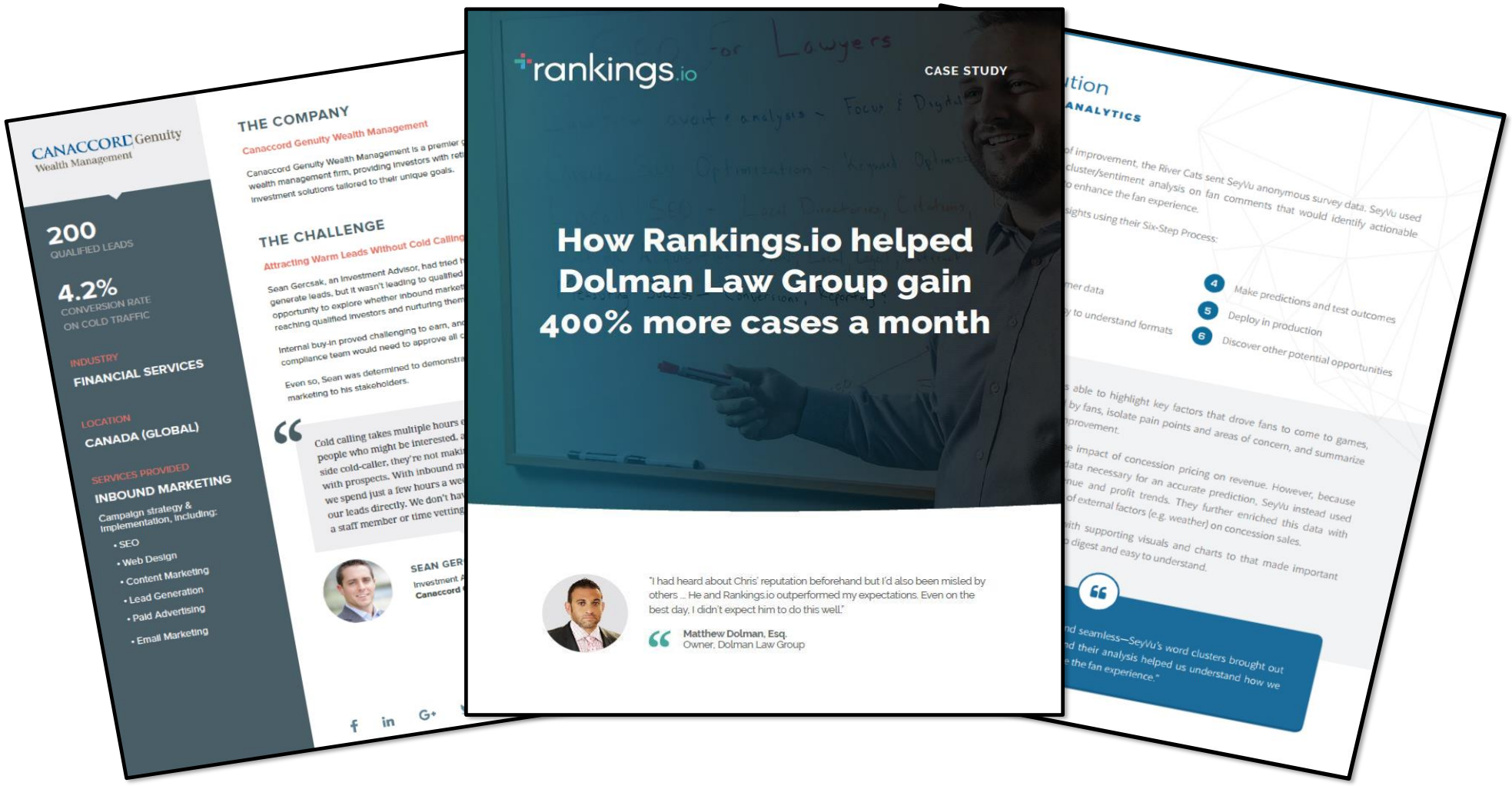
We want to do this right and make it as easy as possible for you to take part, so if you're open to it, we have Case Study Buddy waiting in the wings to help put this together.

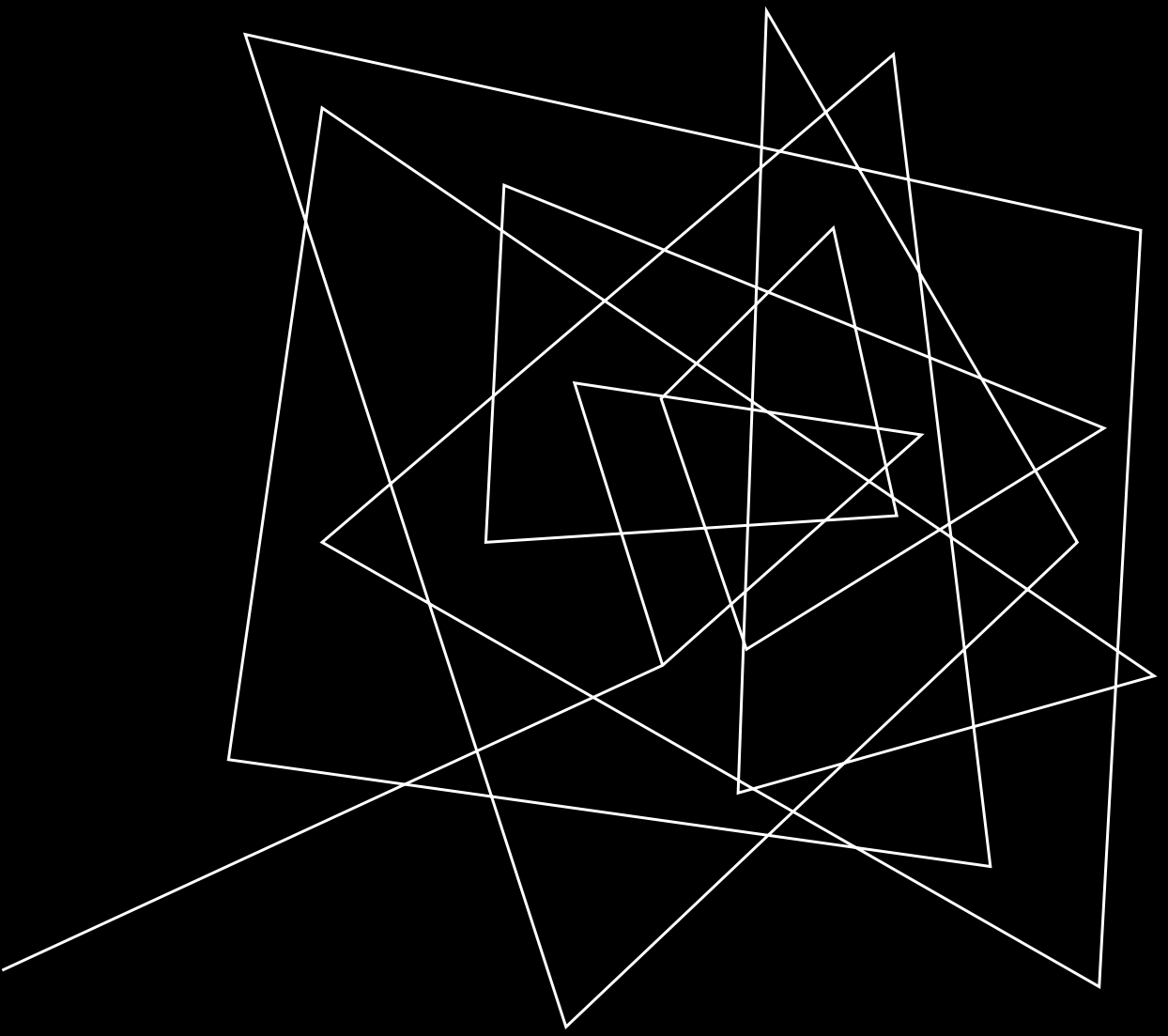
Are you open to being featured?

Cheers,

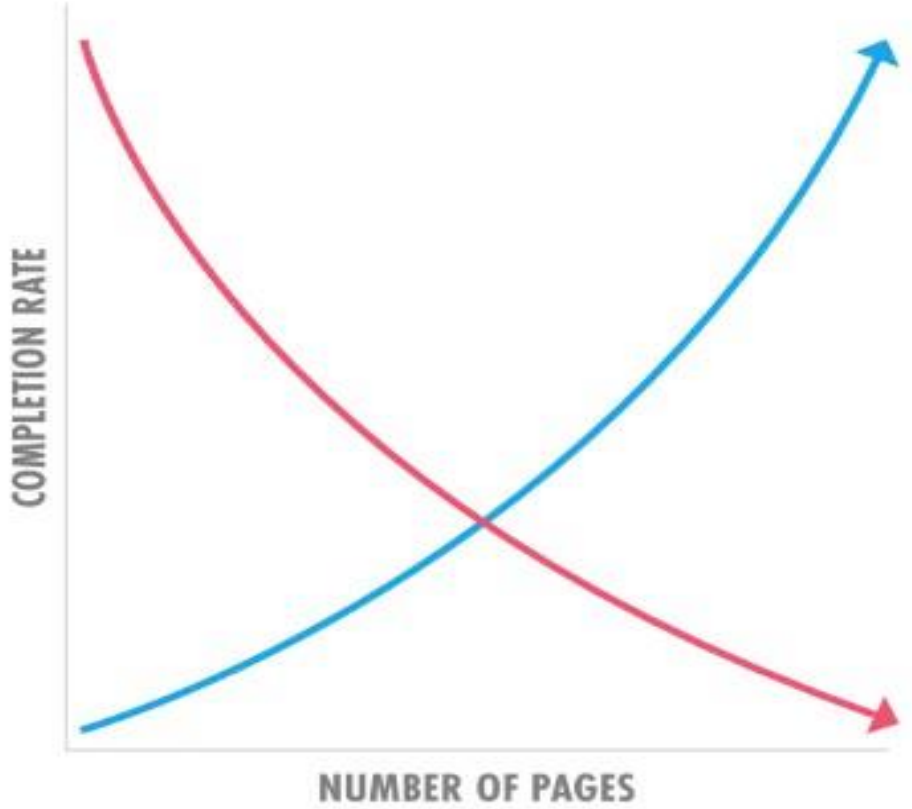
[Your Name]

- **Personal**
  Why them? Why now?
- **Specific**
  What parts of story will you cover?
  What metrics?
- **Clear**
  What's the high-level process?
  What is the time involvement?
  What are next steps?
- **Succinct**
  Keep it focused.


CANACCORD Genuity
Wealth Management
200
QUALIFIED LEADS
4.2%
CONVERSION RATE
ON COLD TRAFFIC
INDUSTRY
FINANCIAL SERVICES
LOCATION
CANADA (GLOBAL)
SERVICES PROVIDED
INBOUND MARKETING
Campaign strategy & implementation, including:
• SEO
• Web Design
• Content Marketing
• Lead Generation
• Paid Advertising
• Email Marketing
THE COMPANY
Canaccord Genuity Wealth Management
THE CHALLENGE
rankings.io
CASE STUDY
How Rankings.io helped Dolman Law Group gain 400% more cases a month
"I had heard about Chris' reputation beforehand but I'd also been misled by others ... He and Rankings.io outperformed my expectations. Even on the best day, I didn't expect him to do this well."
Matthew Dolman, Esq.
Owner, Dolman Law Group
ANALYTICS
4 Make predictions and test outcomes
5 Deploy in production
6 Discover other potential opportunities

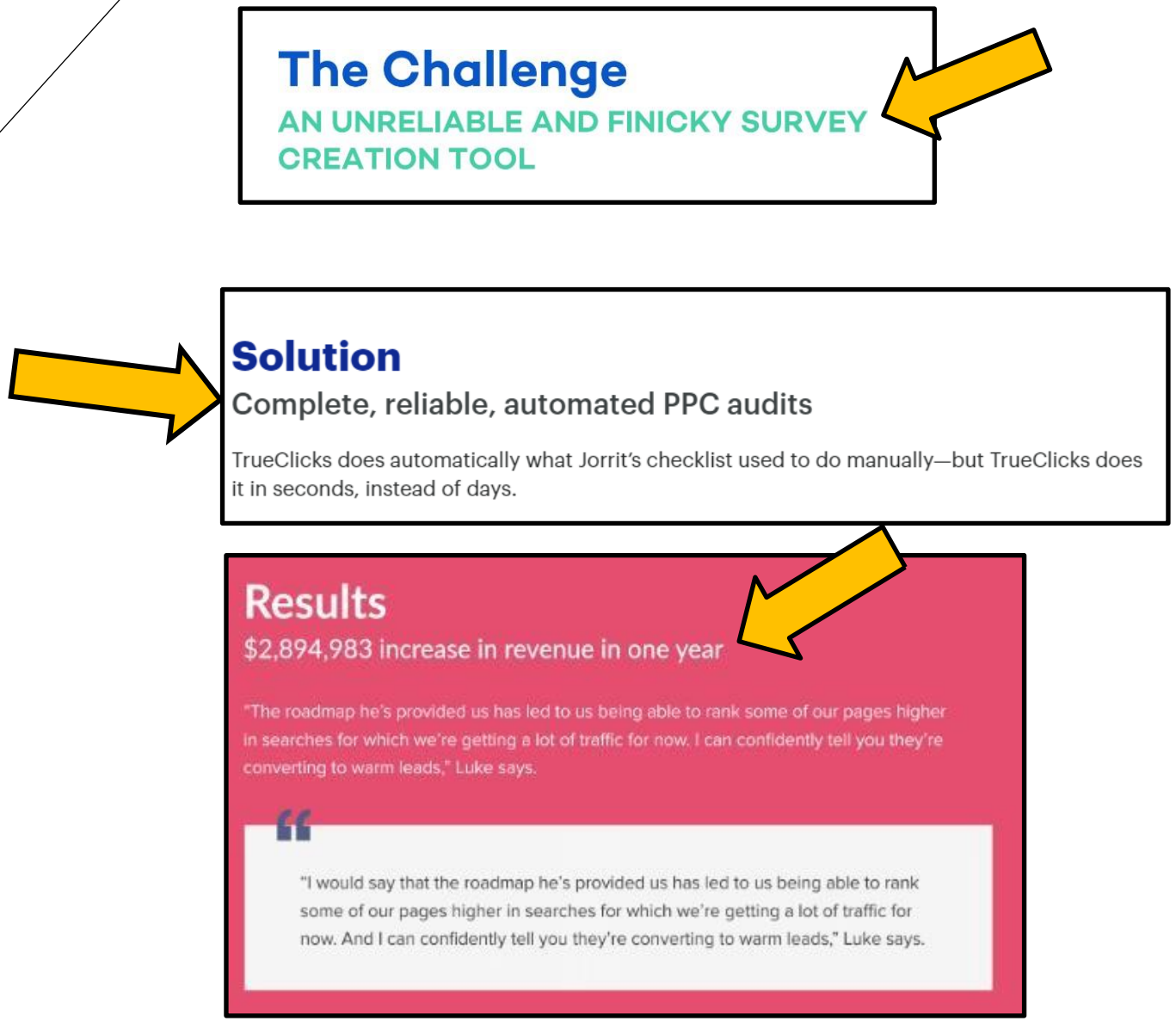


#5: QUICK HIT PRODUCTION TIPS

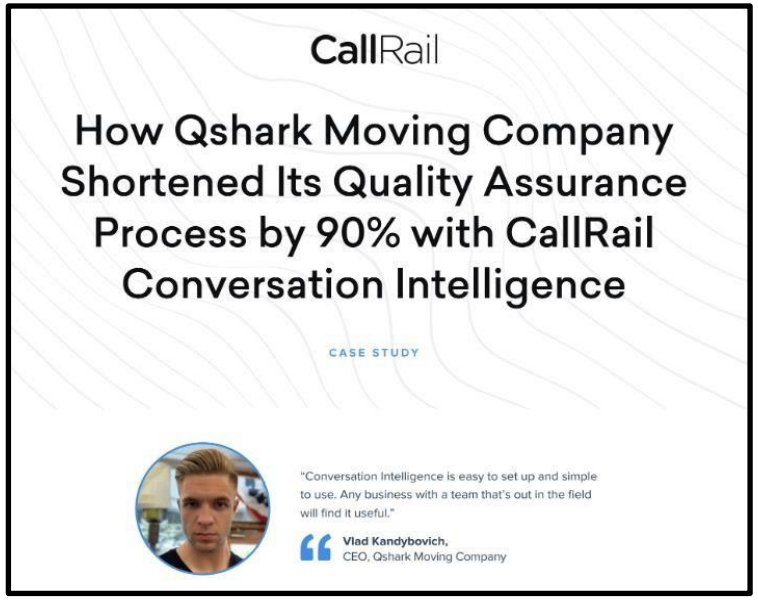


COMPLETION RATE WAS HIGHER WHEN CONTENT WAS NO MORE THAN 2-5 PAGES IN LENGTH.

Info source: https://lp.docsend.com/sales-benchmarks-report



- Quick context
- Satisfy scanners
- Set expectations



- One focus
- One (relevant) KPI
- Support with proof

Natural gas facility recognizes flow rate problem

At a midstream gas processing facility, a freezing valve was the cause of reduced production: When the pressure dropped from 900 PSIG to 140 PSIG, the gas saw a sudden drop in temperature of about 50◦F. Water vapor in the gas steam combined with hydrocarbons to form hydrates that froze as the temperature dropped below the dew point.

If the problem wasn't addressed, the facility would have faced a reduction in productivity or even a complete shutdown—and every moment of downtime means potential loss of revenue. The facility manager knew that heating the gas is a method for controlling gas hydrates, but needed guidance on the specific heating system to best solve their build-up problem.

- **Tension**
- **Stakes**
- **Hero, not 'damsel/dude in distress'**

“HERE’S WHY THAT MATTERS.”

After observing how the Pizza Hut team were using their payroll systems, Zellis recommended three changes that would speed up their processes.

Firstly, because the business has a high turnover of restaurant staff, ‘housekeeping’ measures would ensure time wasn’t spent checking the records of people who no longer worked in the business.

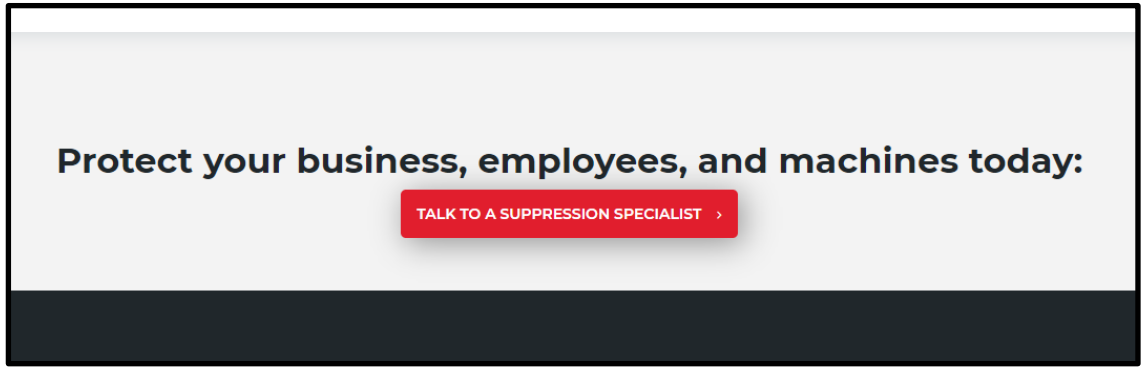
Secondly, payroll processing would be uploaded to Zellis’ servers in the cloud, taking away the need to bounce data back and forth between Pizza Hut systems and Zellis systems.

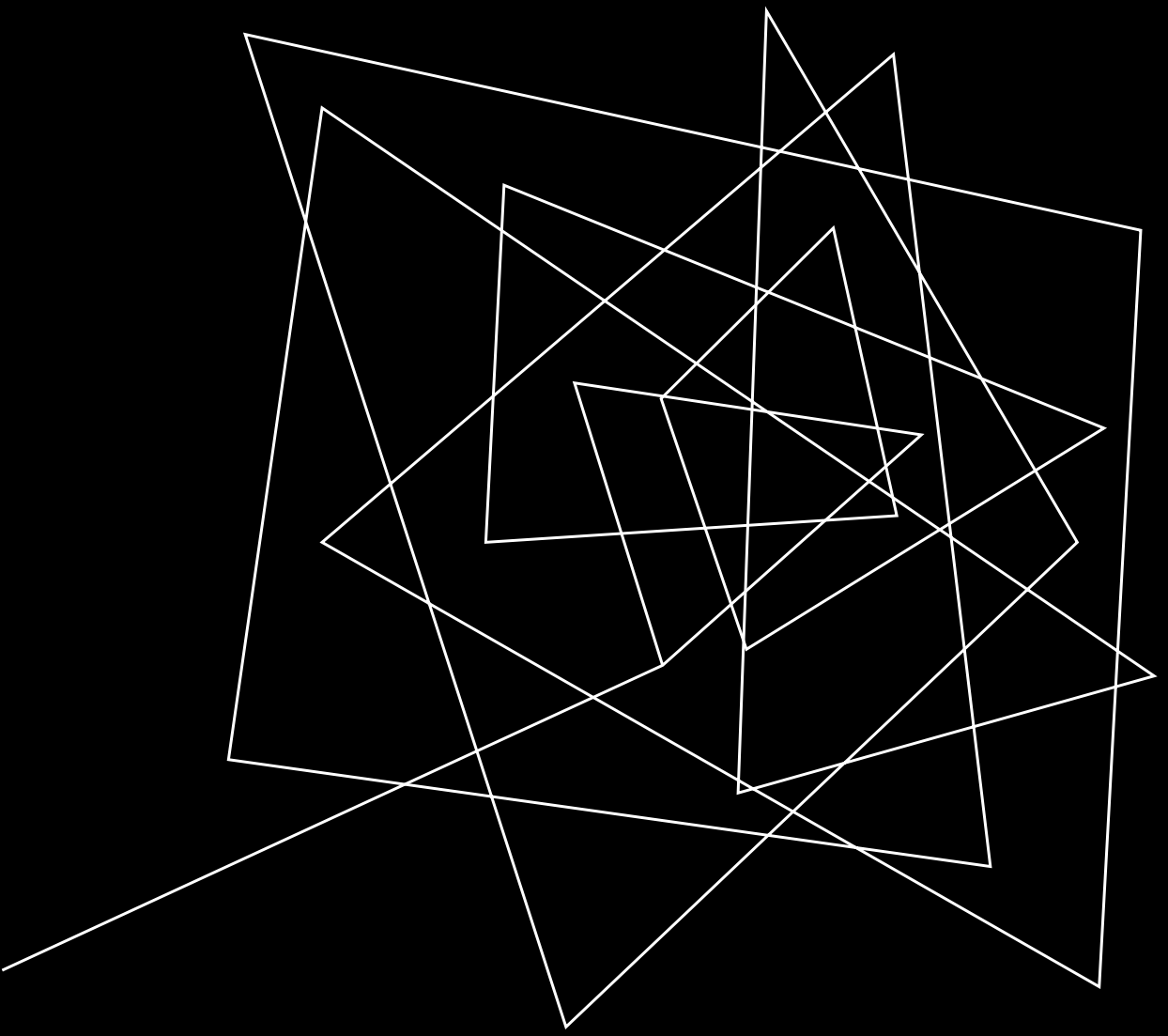
IMPACT BEYOND ROI

From Susie's standpoint, every part of their training program has gotten better, faster and more intuitive since the switch.

> **"We've improved our training efficiency by at least 95%,"** Susie beams. **"We don't use up those print materials, there's no manual entry, and our secretary isn't having to chase people to get their training."**

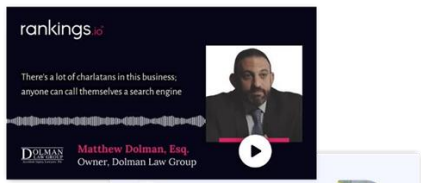
SPECIFIC CTA

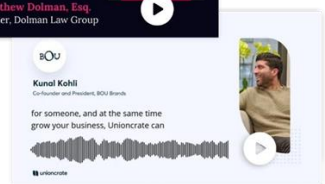


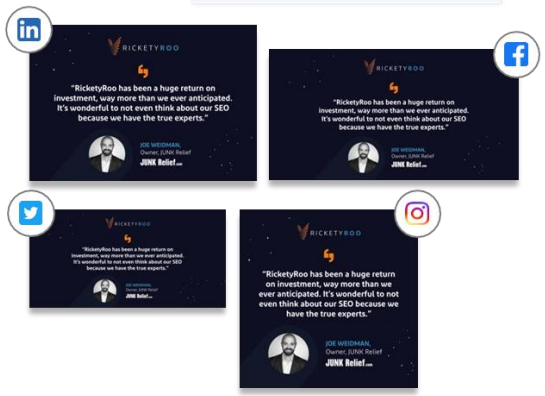


#6: SHARE LIKE YOUR ROI DEPENDS ON IT

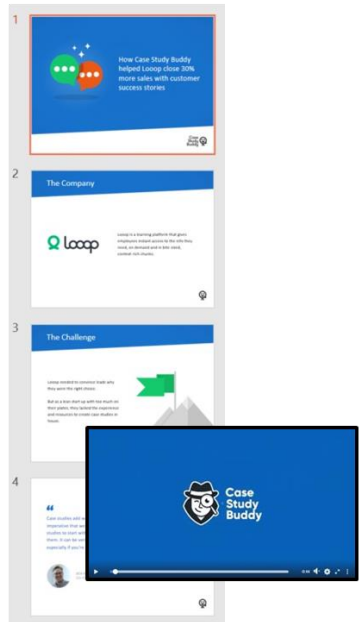
Nibble

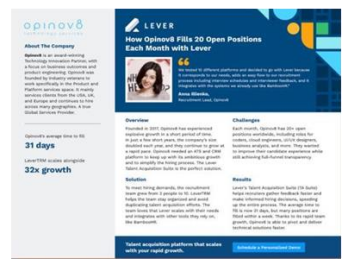




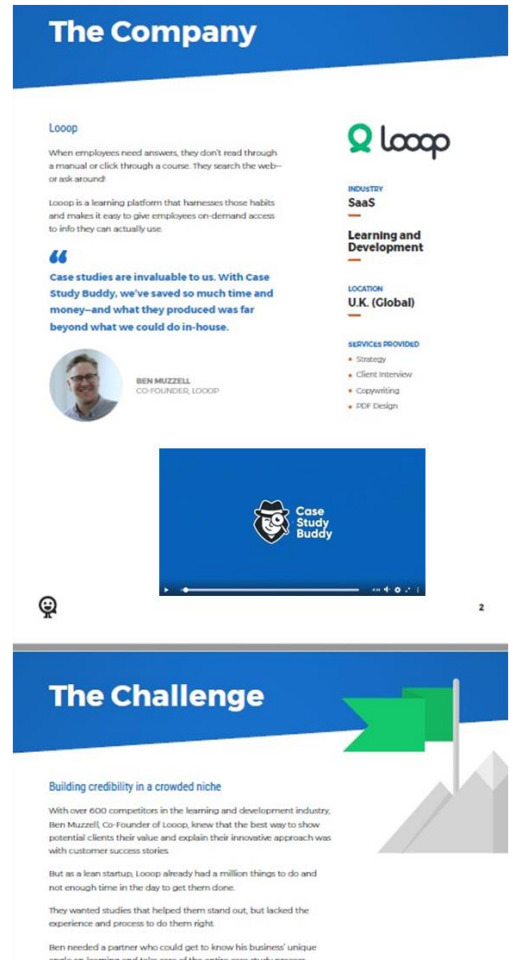


Bite





Snack



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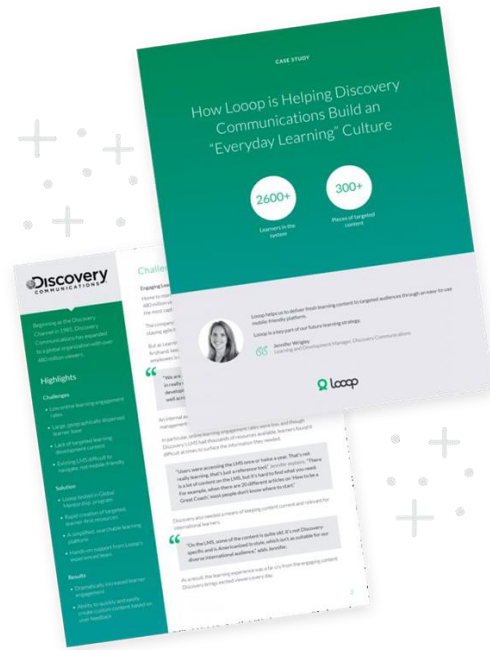
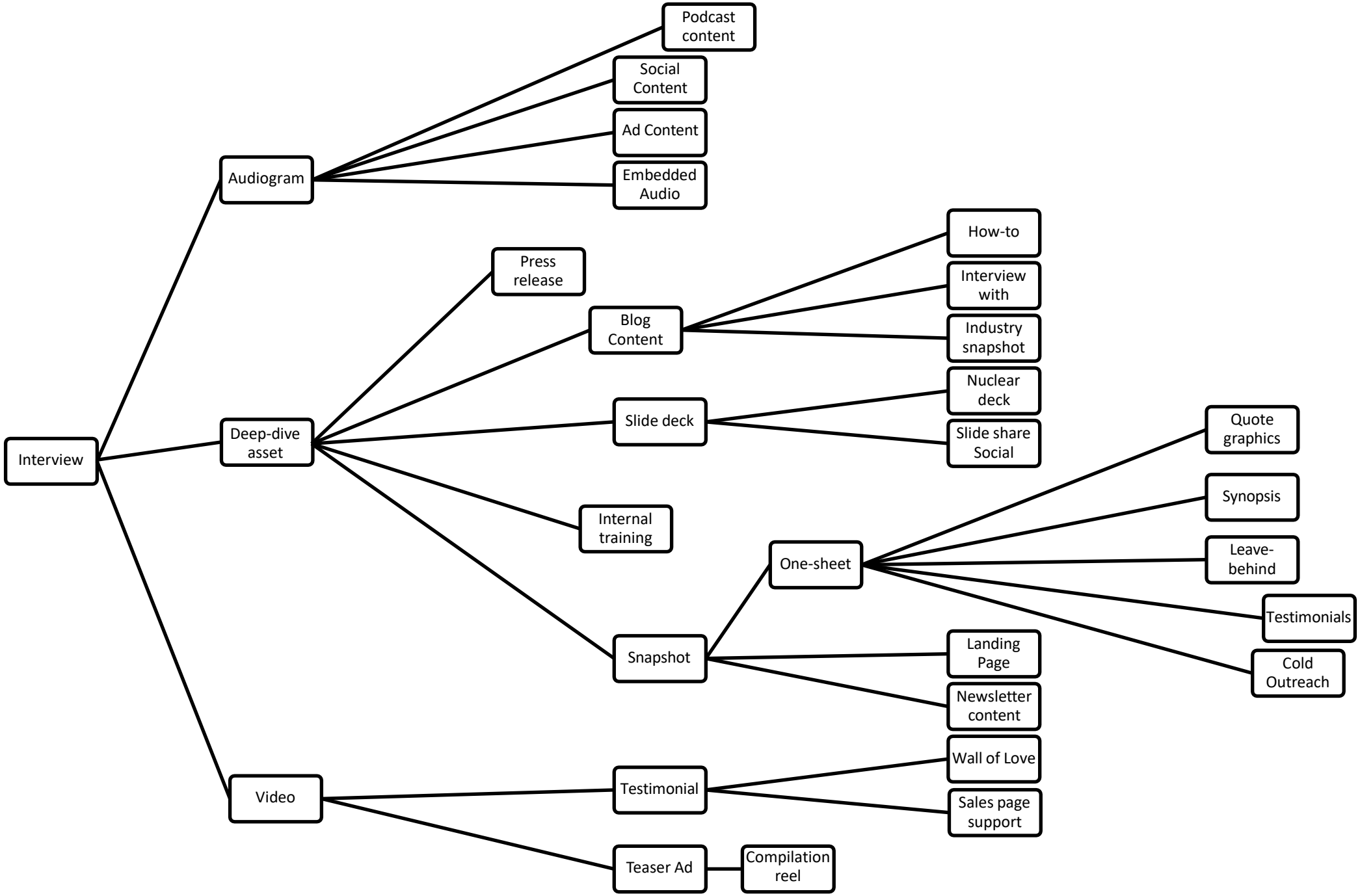
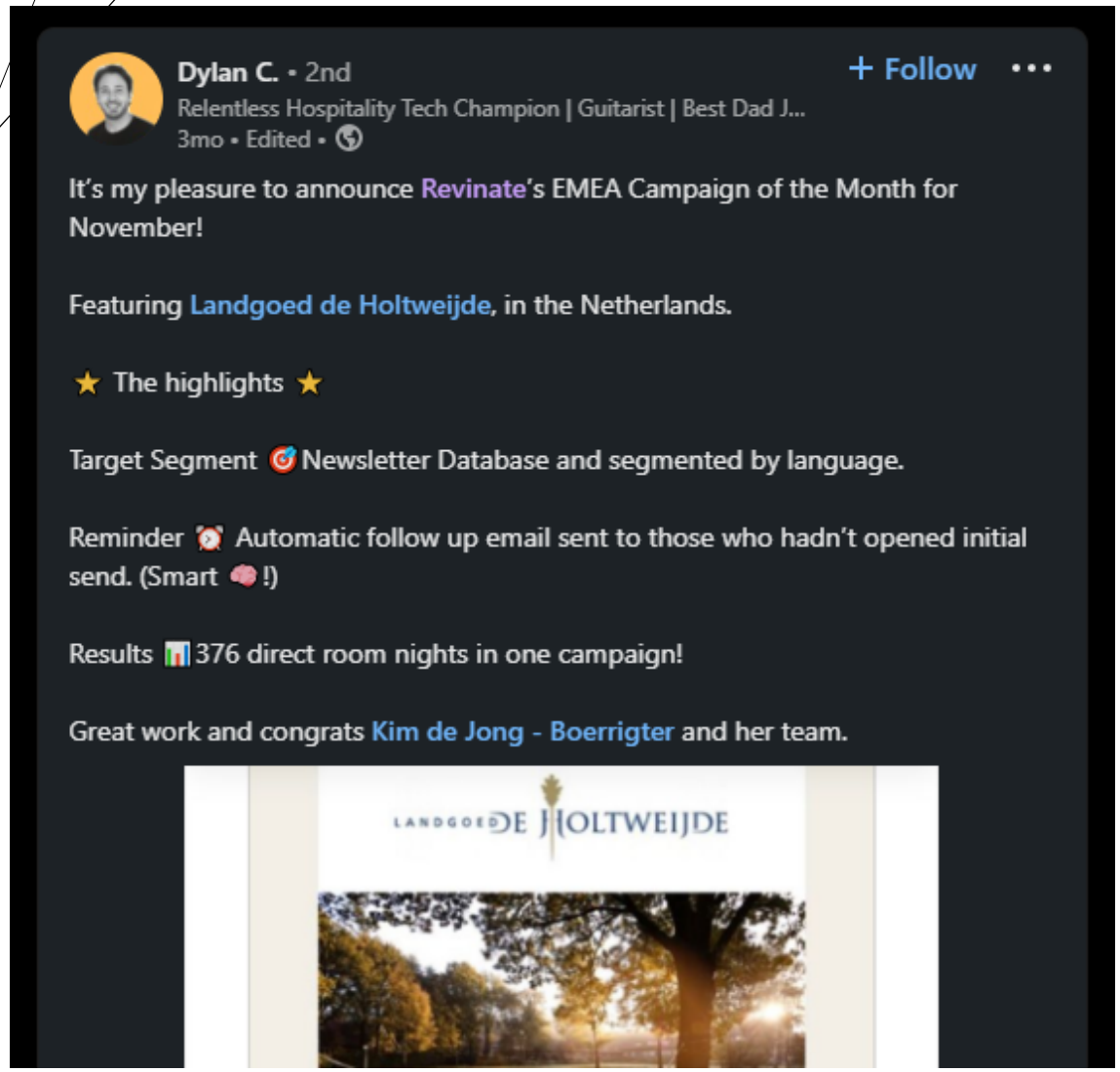


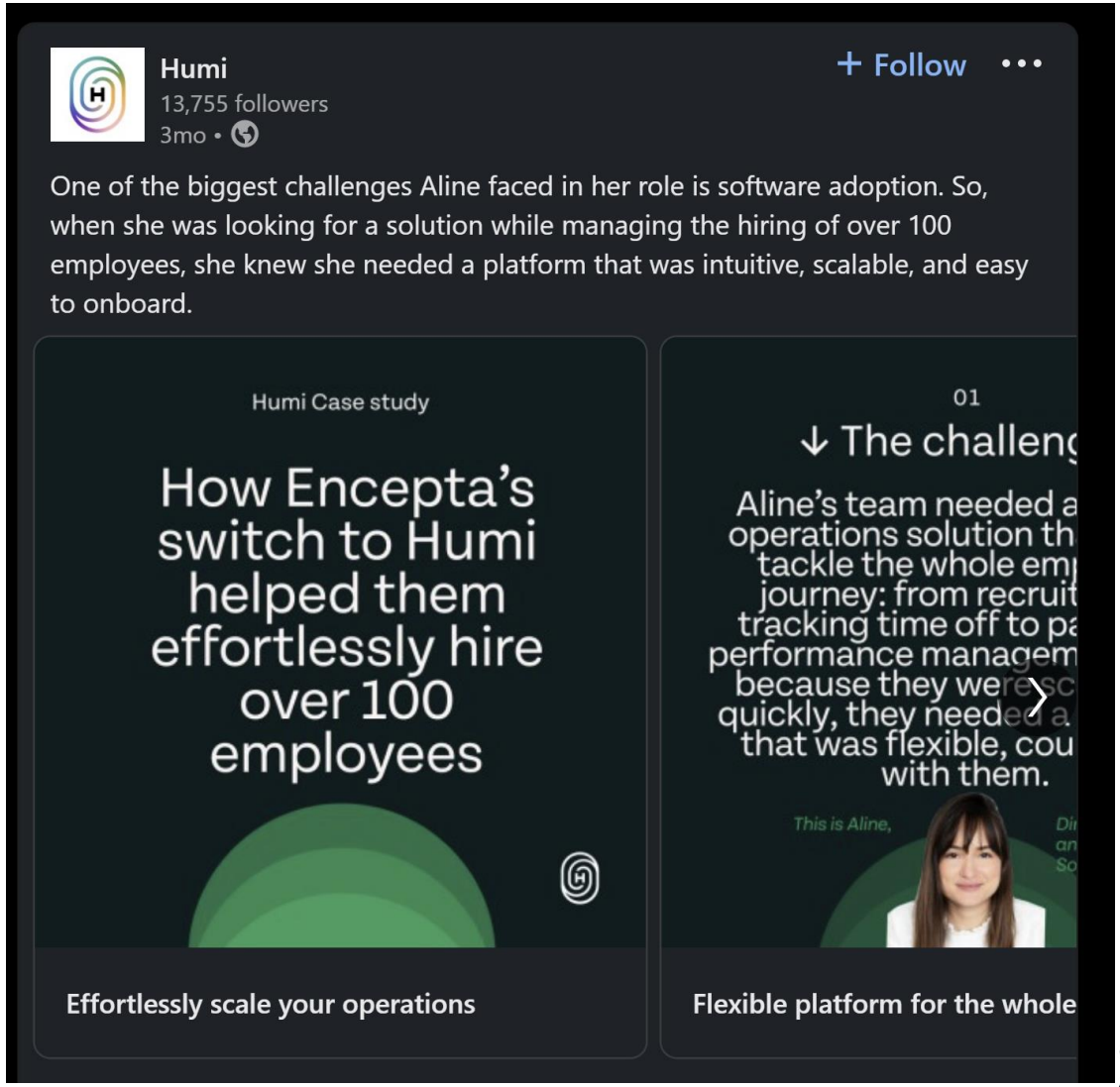
Case Study Buddy



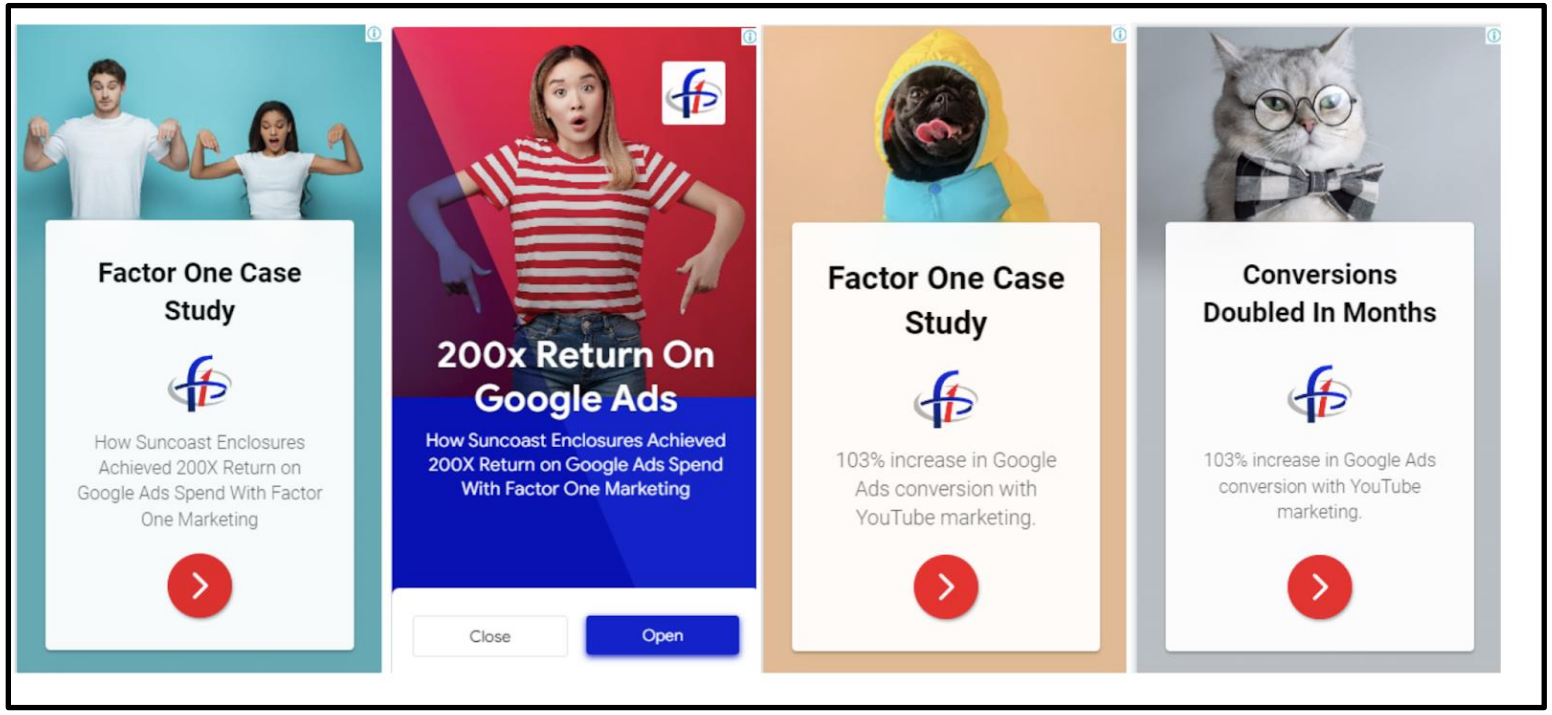
Case Study Buddy

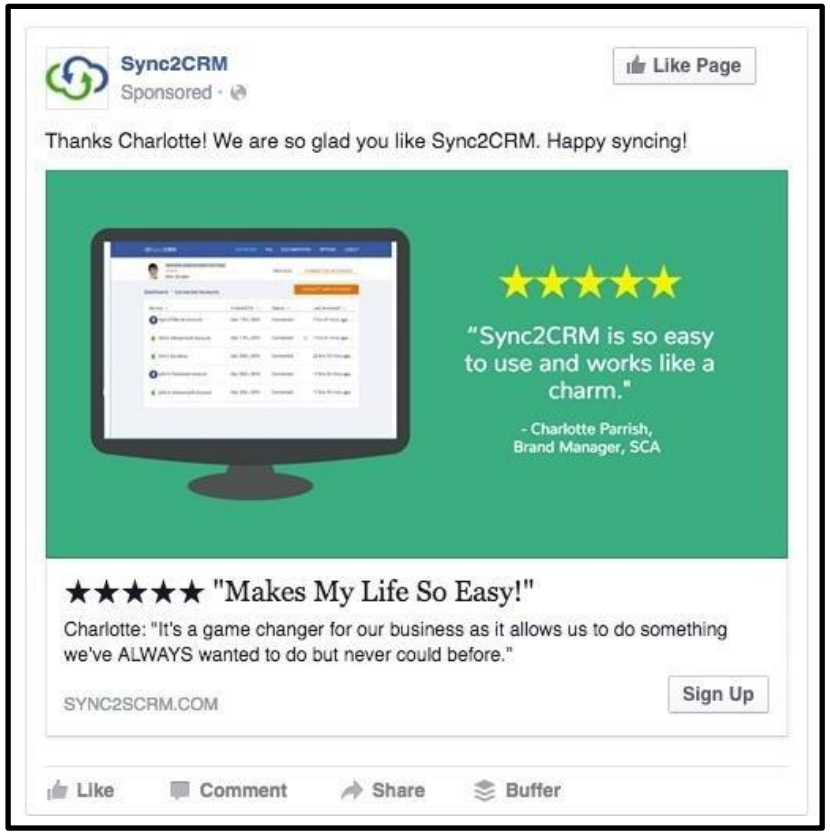
SOCIAL CAMPAIGNS



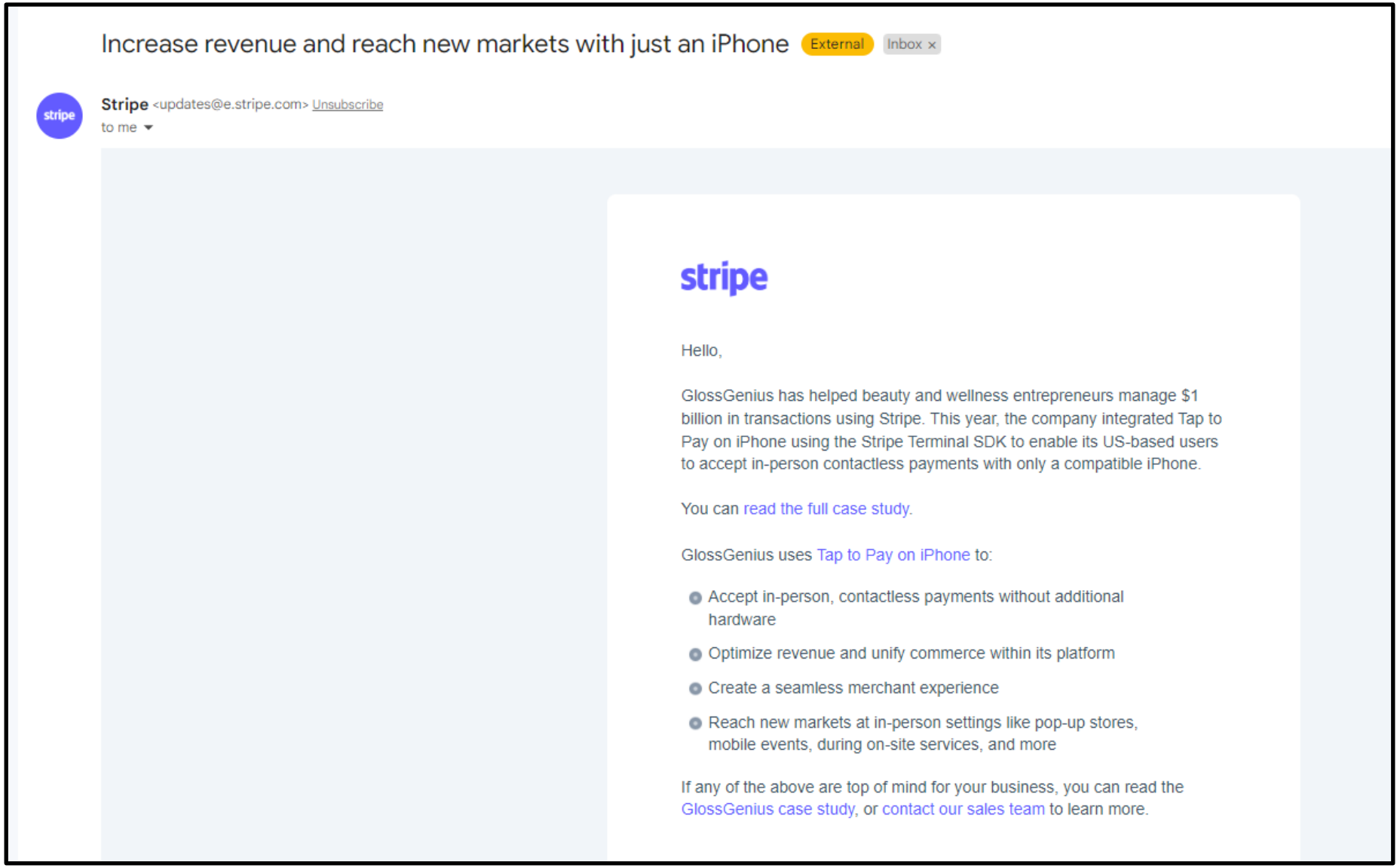


AD CAMPAIGNS





EMAIL CAMPAIGNS



Increase revenue and reach new markets with just an iPhone External Inbox ×

Stripe <updates@e.stripe.com> Unsubscribe
to me

stripe

Hello,

GlossGenius has helped beauty and wellness entrepreneurs manage $1 billion in transactions using Stripe. This year, the company integrated Tap to Pay on iPhone using the Stripe Terminal SDK to enable its US-based users to accept in-person contactless payments with only a compatible iPhone.

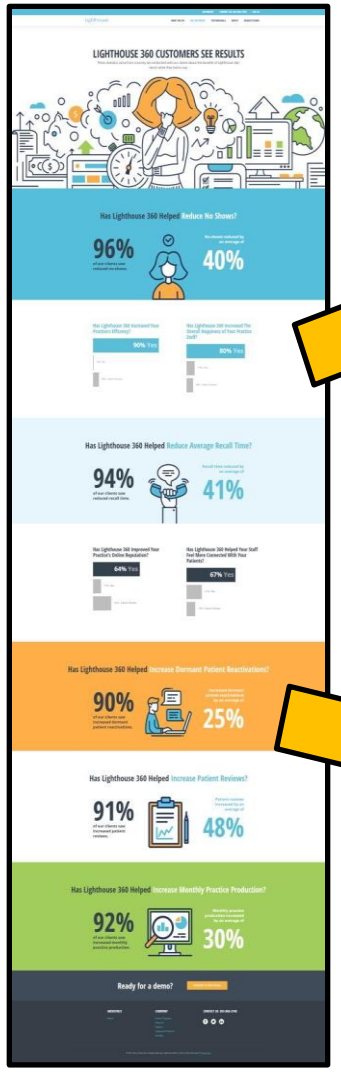
You can read the full case study.

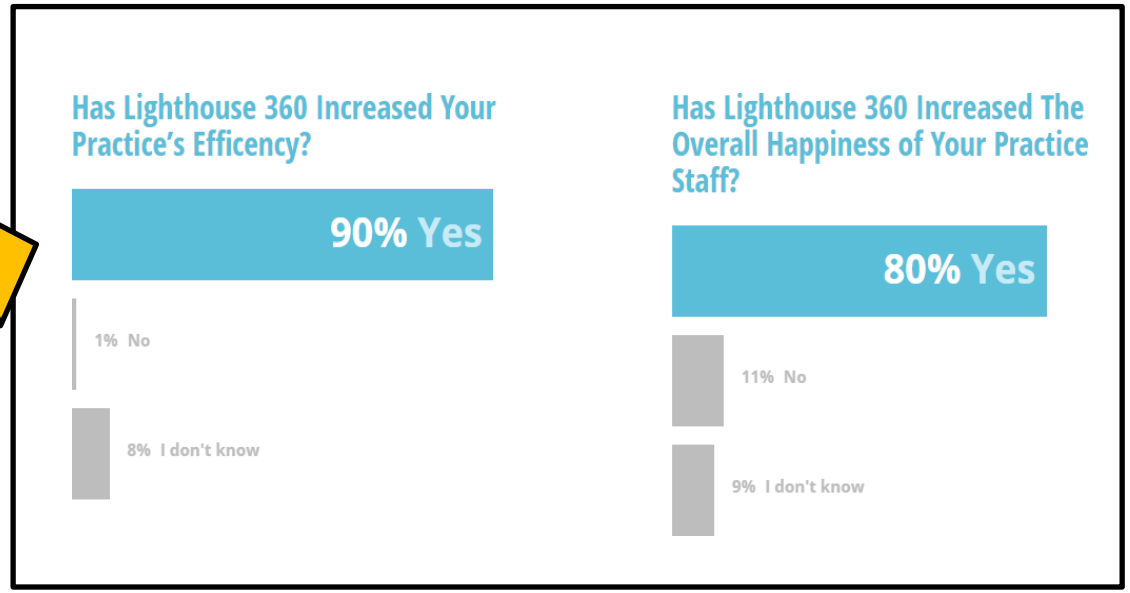
GlossGenius uses Tap to Pay on iPhone to:

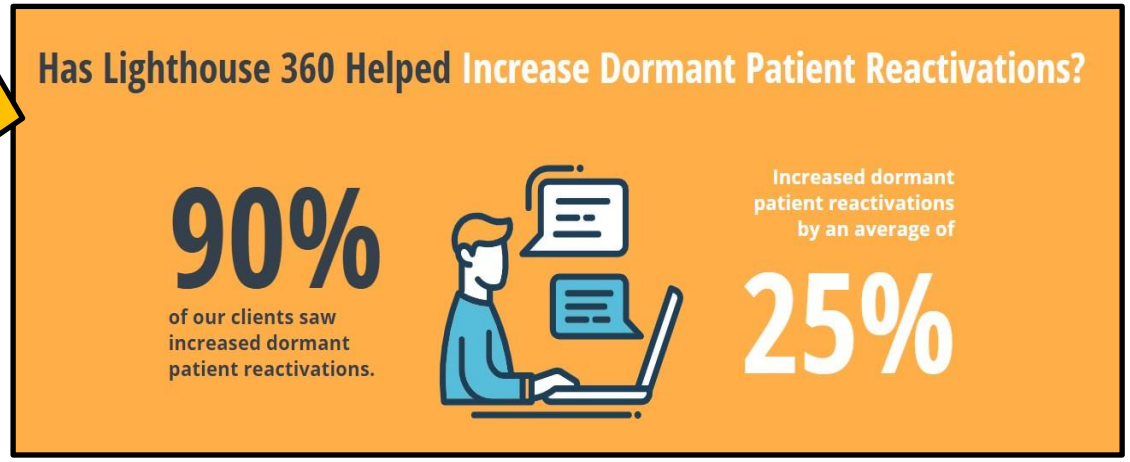
- Accept in-person, contactless payments without additional hardware
- Optimize revenue and unify commerce within its platform
- Create a seamless merchant experience
- Reach new markets at in-person settings like pop-up stores, mobile events, during on-site services, and more

If any of the above are top of mind for your business, you can read the GlossGenius case study, or contact our sales team to learn more.

VISUALIZATIONS







COMBINATIONS

CHALLENGE

Performing large-scale migrations for clients means they need to be able to migrate quickly, securely, and flawlessly.

SOLUTION

Reports and increased visibility help identify issues quickly, so they can be addressed or eliminated before migration.

RESULTS

75% reduction in effort for larger migrations, as well as 30% licensing savings compared to other migration tools.

Start a free trial →

The effort would quadruple if we had to do everything manually…. it almost couldn't be done without ShareGate.

0:00

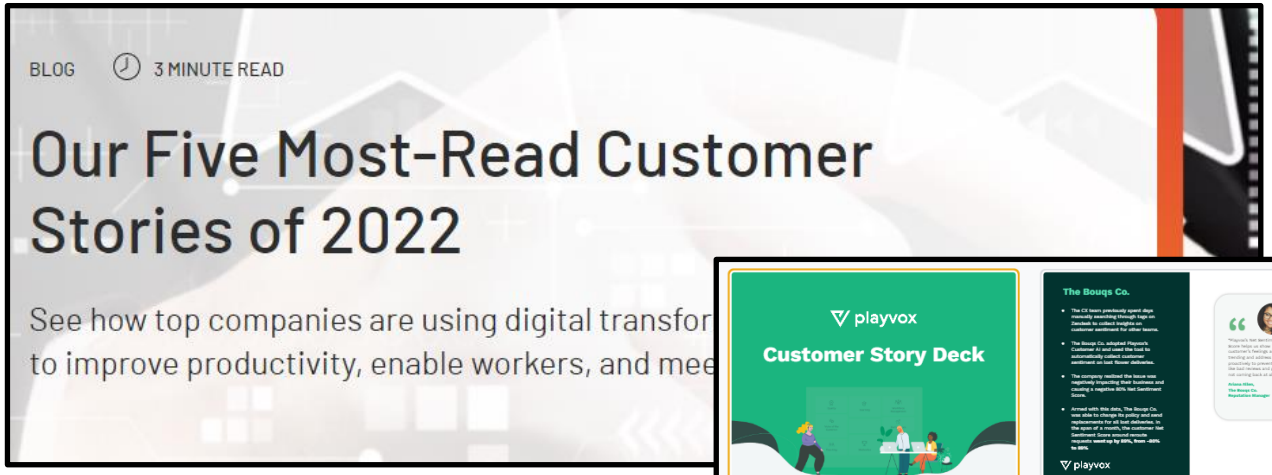
– Doug Punchak, Application Development Manager, Avvenire Solutions

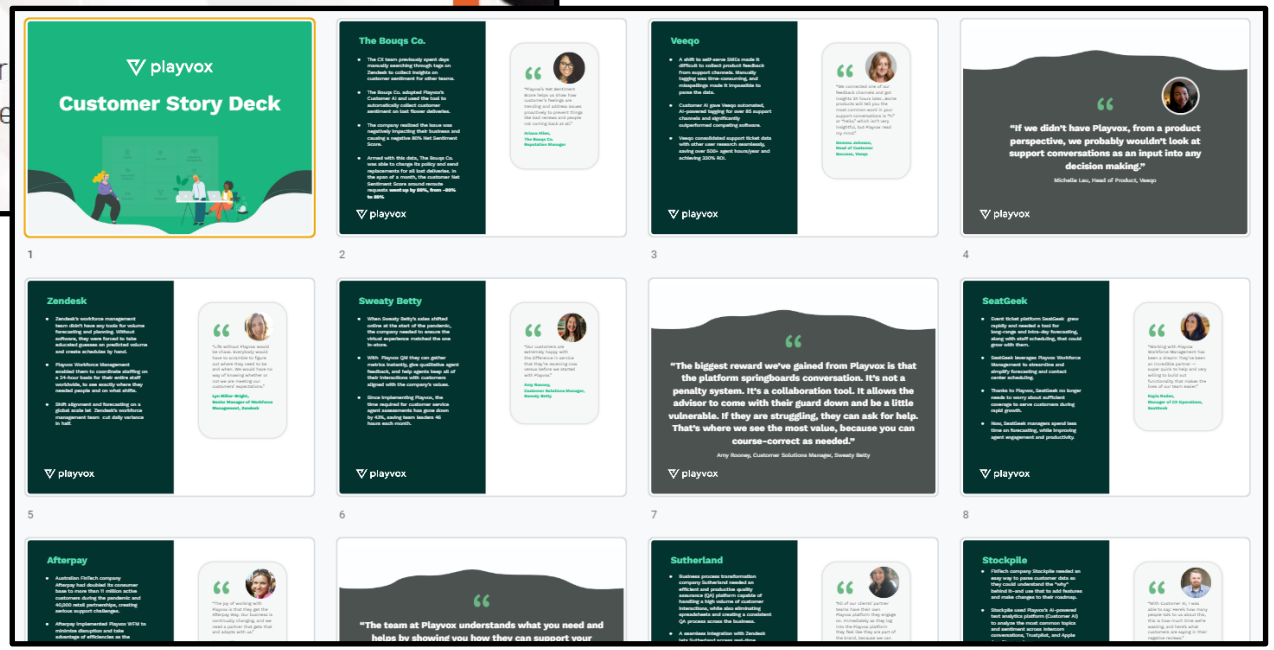
Key features

ShareGate offers fast and reliable migrations

Speed and reliability are especially important to organizations that want to run time-sensitive, big-bang migrations on a weekend and have employees return to an upgraded, flawlessly running environment the following Monday. Avvenire uses several **features and capabilities in ShareGate** to make this possible.

COMPENDIUMS





TOP TAKEAWAYS

- Leverage case studies across the entire buyer’s journey
- Have a documented repurposing plan
- Ensure consistency across formats/stories