HOW TO CREATE A COMPELLING CASE STUDY FOR INBOUND MARKETING

1 Choose a topic & client

To choose a topic, ask yourself:
- ❑ What is the goal of this case study?
- ❑ What product or service do we want to promote?
- ❑ What problem are we helping clients solve with this product or se**rv**ice?

To choose a client, ask yourself:
- ❑ Which client best represents our target audience?
- ❑ Are they well-known enough to provide effective social proof?
- ❑ Have they been with us long enough to prove their success isn't from outside factors?
- ❑ Do we have (or can we get) the data needed to build an effective case study?
- ❑ Can we get buy-in from this client?

2 Get buy-in & set expectations

Reach out to the client and define your precise needs. Explain:
- ❑ What information you'll need
- ❑ Who will write the final report
- ❑ If you need to use logos, images, quotes from the CEO, results-oriented data, etc.

Did you…
- ❑ Explain exactly what you need?
- ❑ Position the case study as a win-win for both brands?

3 Collect relevant data

Now it's time to begin compiling the data.

💡 **Pro tip:**
Assign a team lead who will be the main point of contact at your company and ask for one from your client as well (it would be great if this person were also a good writer, but it's not mandatory).

4 Create the Case Study

All case studies follow this format, at least loosely:
- ❑ **Summary.** This should where you share who the case study is about and what they do
- ❑ **The Challenge.** Explain what issues the company faced that your brand was able to help them solve
- ❑ **The Implementation.** This section covers the "how." For example, did your client A/B test titles? Change up CTAs? Test two different email formats?
- ❑ **The Solution.** Now share the results of all the data collected
- ❑ **Call to Action.** What do you want readers of the case study to do? Sign up for a free trial? Live chat with support staff? Keep it brief and to the point

Now the writer/project lead takes the info writes clear, compelling copy with short, strong points and quotes, images and graphics (and in some cases, video) sprinkled throughout.

❶ **Don't forget:**
The content needs to be edited by a professional editor before it goes live. ***This is non-negotiable!***

5 Distribute your study

- ❑ Publish on your website
- ❑ Arm your sales team to send to prospects
- ❑ Use in sales presentation decks
- ❑ Print for leave-behinds at sales meetings