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GUIDE 2019

How to produce an effective client case study

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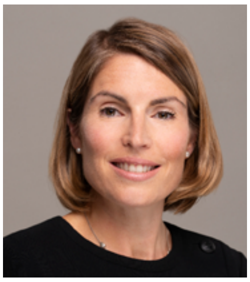

ABOUT THE AUTHOR

Cathy Hayward is managing director of Magenta Associates, and a communications specialist with more than 18 years' experience in a range of journalistic, publishing and marketing roles. She founded Magenta in 2011 after a journalistic career spanning a number of different titles including *FM World*, the award-winning magazine for the British Institute of Facilities Management, *Marketing Week, Financial Management, Soccer Analyst, Supply Management, Unions Today, People Management* and *Director*. She holds a Masters degree in journalism, as well as the Chartered Institute of Public Relations' post-graduate diploma in PR.

Introduction

Case studies are one of the most valuable ways a business can communicate with potential clients and are also an effective means for certain sectors, such as FM to share best practice with the wider business world. This is because a case study taps into the intrinsic human need for a good story and as every trainer knows, because the human brain is wired to follow a narrative structure, stories help us learn and remember facts more easily.

A case study is also a powerful medium to instil trust. For anyone who has never used a particular firm's services or products before, a case study will tell them more about the organisation and help build their trust that this is a brand that can deliver real results.

Here are our top tips for researching, writing and distributing a case study.

This short guide takes you through the process.

1

Gather together all the background information about the client organisation, including its core business, number of employees, number of sites, mission, vision and values, key challenges in the market, history and key personnel. Do the same exercise with the end user business you want to showcase, including the issues it was looking to solve and the key contacts within the organisation willing to discuss the story in more depth. This is important, as without a customer willing to go on record on how delighted etc they are with the service they've received, you've got no case study.

2

Arrange to interview the client contact and the end user/customer contact. Ideally this should be together, as you often find people bounce stories and examples off each other. Ask them to follow up the discussion with any statistics/data which will help illustrate the benefits of the service or product.

3

It's important that a case study isn't all sunshine and roses. It should present a problem and how that problem was resolved using the client's product or services. This means you must ask for one or two specific problems that the client has been asked to address, what decisions were taken to address the problem and specify any objectives attached to overcoming those problems. Finally, ask for evidence that illustrates how the actions taken helped solved the problem and benefited the end user. For example, with a project-based case study: ask about the objectives for the project (whether they were met and how this was measured); stakeholder engagement and communications; your client's input in the project; how the project team was organised; the procurement methods used and if possible, the costs involved.

4

When you come to write up the case study, include a descriptive headline. This should incorporate the name of the customer/end user, especially if it's a big name, the benefits your organisation has brought to that organisation and the service or product which delivered such great results. The text should concentrate more on the customer story than the client organisation which provided the service /product, and it's imperative you insert an end user quote which helps sum up the wonderful experience they've had dealing with the client.

5

An effective case study should include supporting imagery; so discuss with the client which image would work best – they might already have some images on file, or does one need to be sourced? Ensure any image is hi-res; the copyright is owned by the client, or the client has permission to use the photograph and write any photo credit on the case study. If a headshot is required, see the Magenta guide to taking a selfie.

6

Approval is vitally important in any case study process, so ascertain who needs to approve the case study within the client's and the customer/end user's organisation as well as any third parties mentioned. Always seek written approval from the relevant people (an email is fine) and ensure you keep a record of the written approval in case of any queries.

7

Publicising the case study. Once you're ready to go live, warn the client that the case study will be published on a certain date and check that the client links to the case study through their social media feeds. Promote the case study coverage through the client website, their customer database and the end user subject's own website. It is also worth checking if the case study can be adapted to use in the client's marketing material?

8

Finally. Case studies take a lot of effort to research, write and gain approval, mainly because there are so many heads involved. This means the case study 'afterlife' is crucial; so create as much traffic as you can from it by checking if any of the material can be used elsewhere – in a feature, as a testimonial, a press release or in a white paper. Case studies also have relatively long shelf lives compared to a news story or feature, so ensure you send a copy of your case study to any journalists writing about the topic up to a year following publication.

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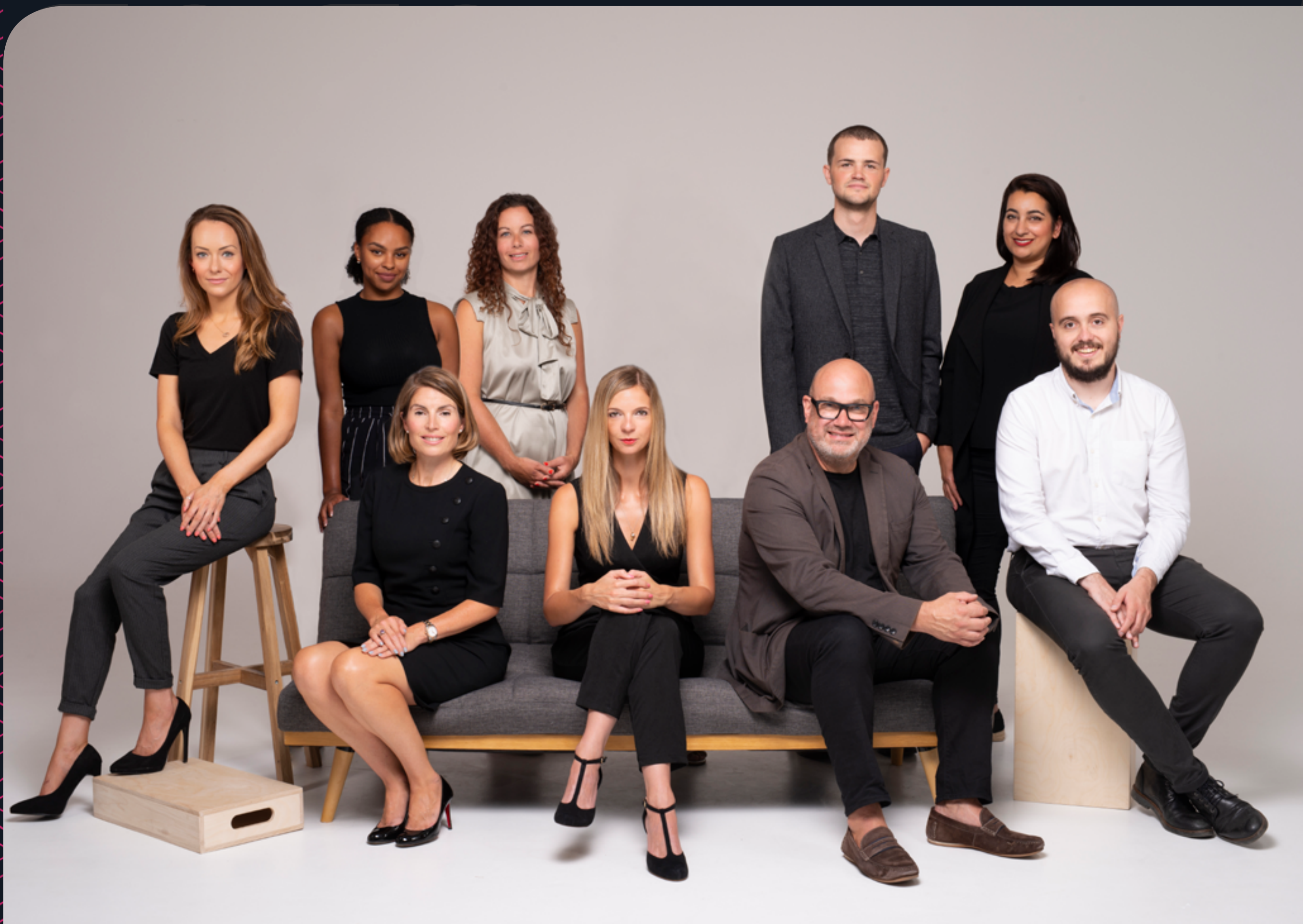

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