

A Dozen Proven Ways to Profit from **Case Studies**

How to Leverage Real-Life Success Stories
to Grow your **Customer Base**

by Richard Bellikoff



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writing

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Focus on Customer Success

Whether you call them **case studies**, customer success stories, customer stories or just success stories (this report uses all those terms interchangeably), they're amazingly adaptable. They **can produce bottom-line results in just about any marketing, sales or p.r. campaign.**

It's unfortunate that companies don't get more mileage out of their case studies. Some, in fact, do little more than put them in their ads and post them on their Web site. They're shortchanging themselves and missing many opportunities.

The beauty of a case study is that, with a minimum of editing, reformatting and re-purposing, it can be put to work in so many different ways. It's one of your most valuable business tools.

Edit, reformat and repurpose your case studies as many ways as possible for maximum case study ROI.

Case studies supply credibility, an essential element in today's hyper-competitive and customer-centric business environment. Day after day, customers are inundated with marketing messages. They're understandably skeptical of companies' claims. Businesses must work hard to gain their trust.

Think of a case study as a sort of reality check. Prospects learn about the benefits of your products and services from your salespeople, but that's not enough. They also need to know how other businesses facing similar challenges solved their problems.

That's why true stories about customer successes are indispensable. They provide the validation that can turn prospects into customers. **The benefits that you enjoy can include:**

- Increased brand awareness
- Better lead generation
- Improved customer retention
- Higher conversion rates

. . . and ultimately, an expanded customer base.

To get the maximum impact from your case studies, make them an integral part of your corporate culture. Leverage them every way you possibly can. If you've already invested the time and money to have them produced, why not get more bang for your case study buck?

The Many Benefits of Case Studies

Case studies are very versatile, with an almost endless assortment of possible applications. Start with these 12 and you'll see results.

1. Trade Shows
2. Speeches & Presentations
3. White Papers
4. Direct Mail
5. Company Web Site
6. Social Media
7. Press Releases
8. Business & Trade Publications
9. Mass Media
10. Current Customers
11. Sales Training
12. Employee Orientation & Communications

1: Trade Shows

We've all had the experience of returning to our offices from a trade show with a bagful of flyers, brochures and business cards. Often, these materials go unread and end up in the circular file.

Case studies can help your marketing collateral cut through the clutter and become “keepers.” Attendees are more likely to hang on to items that they find useful and valuable—such as stories about customers similar to themselves.

For maximum effectiveness, stock your trade show exhibit not just with one or two printed case studies, but with a variety of them, profiling an assortment of customers who've successfully used your products or services. Be sure the people working at your exhibit are well-versed in all the various case studies and the types of customers they apply to. That way, they'll be able to select the appropriate ones for any visitor who drops by.

But don't stop there. You can also **have a case study enlarged and displayed in your exhibit.** Since visitors won't usually have time for a lot of reading, it's best to limit the amount of text. Grab their attention with:

- Headlines & sub-heads
- Bullet-point summaries
- Strong visuals
- Customer testimonial quotes

If you're running a promo video at your exhibit, that's another good spot for a customer story. These videos are typically short, so pick one or two of your strongest stories that will appeal to as many prospects as possible.

Finally, **don't neglect the event invitation** and other pre-event promos such as ads, announcing your company's presence at the show. Tell attendees about the case studies you'll be featuring, to build interest and traffic to your exhibit.

Case studies can help turn trade show exhibit visitors into customers.

2: Speeches & Presentations

There's no better way to emotionally connect with a live audience than by telling a memorable customer story. They make excellent additions to any speech or presentation, especially if it's brand, product or service-oriented.

Even the most data-driven financial or technical presentation can benefit from a few case studies. For example, try adding some customer anecdotes that put a human face on a revenue source or demonstrate how a customer solved a technical problem.

A memorable customer story can enhance any speech or presentation, raising brand awareness and

A success story can really bring a speech or presentation to life, particularly if you can **arrange to have the customer in the audience**. Politicians are experts at this. Watch any State of the Union speech and notice how the president keeps pointing out people in the audience and telling their stories. Try this technique yourself with a willing customer.

Even better, invite some customers to tell their own stories at an event, especially an industry conference, trade show or webinar. They can speak either in a stand-alone appearance or sandwiched into a presentation from someone in your company. Whenever possible, have their presentation written or outlined for them and make sure they're comfortable with it beforehand. Don't forget to have whoever is hosting or emceeing the event give your customer a strong introduction.

If a speech or presentation uses PowerPoint or other visual aids, they should include a bullet-point summary of the customer stories and a few customer photos. This can help break up the all-too-familiar tables, charts and graphs and prevent "Death by PowerPoint." Don't forget to **include printed versions of the complete customer stories in the handout package after the presentation**.

3: White Papers

A white paper describes a business or technical challenge faced by companies and then presents a solution for that problem. So does a case study.

Both a white paper and a case study are designed to supply information that will help potential customers make decisions.

The main difference is that a white paper is a soft sell, an educational, thought leadership and lead-generation tool. A case study, on the other hand, is more of an overt piece of marketing collateral that focuses on a particular customer's story.

Another difference is that a white paper is generally present or future-oriented, describing an innovative product or service that may not have any customers yet. A case study, in contrast, is usually written in the past tense, profiling an actual customer's implementation of a product or service.

That makes them a perfect pair.

A case study can add credibility to a white paper by illustrating how a customer put the white paper's "theory" (i.e. its recommended solution) into practice. In order for this to work, the customer solution described in the case study must correspond to the one advocated in the white paper.

A case study can reinforce a white paper's credibility and help generate more

What makes a case study such a good fit for a white paper is that both documents have similar structures—starting with background issues and then moving on to challenges, solutions and results.

The best place to put a case study in a white paper is near the end, between the Solution section and the Conclusion or Summary. That way, it will reinforce the white paper's solution with a real-life example.

Since many case studies are one or two pages long, you may not even have to edit their text when inserting them in a white paper. Only the formatting and visual design will need to be changed to match those of the white paper.

Not every white paper is a candidate for incorporating a case study, but it's appropriate more often than you may think. It's an option to keep in mind whenever your company is producing a white paper.

4: Direct Mail

Direct mail is a short-attention-span medium. Most prospects get a lot of mail and even more e-mail. There's heavy competition for readers' eyeballs. You need something to catch their attention right away.

What better way to open your pitch than with a condensed version of a customer success story? **Stress the benefits that your customer experienced and include some testimonial quotes** for additional credibility.

A mini-customer story makes an eye-catching opening for a direct mail piece. It can help increase

Those quotes are key. Postal and e-mail campaigns should follow the practice of direct response TV. First-person customer testimonials are a staple in infomercials.

The customers that you profile in your mail piece should be selected to match the target demographic of your campaign's prospects.

Each direct marketing piece should include the Web address (URL) of the full-length case study on your company's site, along with the URLs of other similar case studies, for prospects who want more detail.

Customer stories can work well in all direct mail media, including:

- Sales letters
- Self-mailers
- Postcards
- E-mail

Postcards have less space than sales letters or self-mailers, so you'll need to limit your customer story to the essentials. The big benefit is, recipients don't have to open an envelope to see your message. Be sure to make it count.

If it's an e-mail campaign, don't forget to comply with anti-spam regulations. Keep your message brief, to avoid making the reader scroll too much. And add a link to the full-length case study on your company's Web site.

Finally, since this is direct marketing, be sure to include a call to action. It could be something as simple as inviting prospects to download the complete customer story. That has the added benefit of driving more traffic to your Web site and generating even more leads.

5: Company Web Site

It won't be news to you that you should post case studies on your company's Web site. That's often the first place where companies put them.

The trouble is, they often post them only in one location, under "Case Studies" or "Customer Success Stories" or some similar heading. That dilutes their impact.

Case studies should be readily available to visitors no matter where those visitors go on your site. Make it easy to find the studies. Links to relevant studies should appear along with the products and services they feature.

Making customer stories easier to find can produce a site that's more "sticky" and generates more leads.

Make your site's navigation case study-friendly, with menus and links to studies appearing wherever they're appropriate. Provide a variety of routes to the same case study, so that readers can't overlook it.

Site visitors should be able to easily find the customer stories that interest them. Organize your menus by various categories, including:

- Customer's company
- Size of customer's business
- Customer's industry
- Product or service

Web surfers are impatient. Repeat site visitors need to see fresh content or they'll move on to another site. Updating current case studies and adding new ones regularly can help make your site more "sticky" and hold their interest.

Consider putting a shorter version of a case study on your home page, with a link to the full-length version. **Many companies display customer testimonial quotes on their sites, but fail to link them to longer success stories** that the quotes may have come from. Those stories often include key details that could help convert site visitors into prospects and leads.

Make sure your case studies are available not just for viewing, but also for downloading, preferably as PDF files, so that site visitors can save them on their computers.

Finally, **don't neglect SEO**. All the case studies posted on your site should be optimized to improve your search engine rankings. They'll increase prospects' chances of landing on your site when they enter keywords and phrases into a search engine.

6: Social Media

On-line social media can be a powerful showcase for customer stories and a great way to create buzz about your brand—provided that you understand how different these media are from traditional marketing, advertising and p.r.

The social media audience doesn't respond to conventional marketing methods. It wants to be talked *to* and *with*, not *at*. It prefers recommendations from friends, family and other peers. In social media, word of mouth is the most trusted kind of referral.

The social media audience is looking for:

- Engagement
- Relationships
- Conversation
- Sharing
- Interactivity
- Authenticity

Customer testimonials are favorites of social media, so use them often. The testimonial should be from someone your audience relates to and trusts—a peer rather than an officially sanctioned “expert.”

Whenever possible, let your customers tell their stories in their own words. The social media community gravitates toward personal experiences and likes sharing them with peers.

Customer stories are often virally circulated via social media, generating leads

People who hear about a memorable customer story can pass it around virally via popular social media tools like Facebook, Twitter, Digg, Stumbleupon and many others. You can help them by including social media icons for bookmarking and sharing.

Customer reviews of products and services aren't unique to social media. Sites like Amazon and Ebay have had them for years. But social media takes customer input to a new level of interactivity. **Pay attention to the feedback you get from your social media audience**, both positive and negative. You may be surprised at what you discover. **Companies have found ways to improve their products and services based on social media input.**

Don't limit your case study content to text. Video and audio can also catch on and get distributed virally via social media.

As with all Web content, make sure your case studies include keywords and phrases for SEO. Set up Google Alerts and similar on-line services to track which customer story content gets the widest circulation. You'll be surprised at all the different places your customer stories can get passed around to, and all the leads they can generate from unexpected places.

7: Press Releases

To get noticed these days, a press release needs to be newsworthy. It should read like a story written by a reporter. Just announcing the launch of your new product or service isn't good enough anymore. So why not build your press release around a success story that focuses on how a customer solved a problem with your product or service?

A customer story can be particularly powerful as an opening for your press release. Then weave the rest of the story throughout the release, along with key information about your product or service.

A customer story can produce a compelling press release, helping to grow your customer base.

If your product or service is a major breakthrough or innovation, it may be difficult to find a customer story to use for a press release. Customers may not want to reveal their company name and risk losing a competitive edge in their industry.

In these situations, an anonymous case study can solve your problem. You can do this by simply substituting a generic company description for the name of your customer—for example, “a Fortune 500 financial services firm . . .”

The customer contacts that you quote in such a case study will also have to be identified anonymously, by job title rather than name. If the details of the customer's story are strong and persuasive, an anonymous case study can be just as credible as one with company and customer contact names.

Be sure to include keywords and phrases in your press releases before posting them online, to increase search-engine rankings and drive traffic to your Web site.

As with any press release, you should circulate your customer-focused press releases as widely as you can. You can never tell who will read them and respond. **Launch a compelling press release that incorporates a customer story into cyberspace and it can take on a life of its own.**

8: Business & Trade Publications

General-interest business publications, along with trade publications specializing in your industry, are typically full of profiles of companies and their customers. They're natural locations for a customer success story.

Study the publication in question to determine its writing style, length of articles and readership. Also, check their editorial guidelines and their submission policy to find out which of the following formats they accept:

- Bullet-point highlights of your story
- A press release about the story
- Query letter for an article
- A complete article, suitable for publication

Those first two items will usually serve as background information for an article to be written by one of the publication's reporters. If they accept a complete article, they'll generally expect it to be written by someone from your company, or ghostwritten by a freelancer. Even better, for maximum credibility, have it written by a contact at your customer's organization, or ghostwritten for them.

A customer story usually needs some rewriting to turn it into an article. This is not difficult to do. It's only the writing style that generally has to be changed, not the essentials of the story.

Just convert the standard case study format, with Background, Challenge, Solution and Results headings, into more of a journalistic-style feature story, with different headlines, subheads and pull quotes.

Case studies are easy to turn into feature articles that are likely to be read

After your article is published, be sure to get reprints from the publication's editor, in both hard copy and digital formats. You can use these in your marketing campaigns.

Some publications have both print and Web versions, while others just publish on-line editions. **Web publishing offers you two big advantages:**

- Shorter lead time for publication
- On-line archives, so your article never goes out of print as long as the publication stays in business. You can link to them on your company's Web site.

9: Mass Media

There's a good reason why media news reports are usually referred to as "stories." Drama is what their audiences want. News producers, editors and reporters are always looking for compelling stories to hold their audiences' attentions.

That's why case studies are among your best bets for getting media coverage of your company. They have an inherently dramatic structure, with a main character (the customer) facing obstacles that they overcome: Challenge, Solution, Results—beginning, middle and end, the classic three-act architecture of plays, movies and TV.

Business and economics TV and radio programs, along with newspaper columns on those subjects, should be your preferred targets for getting coverage of your customer stories.

You can also try local TV and radio news shows, plus local newspapers. They like to run upbeat "feel good" stories about problem-solving and overcoming challenges, to balance all the negative reports about crime, politics and natural disasters that are typically in the news.

Your customer story will be of even greater interest if it happens to tie in with some newsworthy event.

Customer stories have a dramatic structure that appeals to the media

Unlike business and trade publications, the mass media probably won't accept your story in the form that you submit. They'll normally want to do their own research, interviewing and reporting.

They may want to interview not only somebody from your company, but also from your customer's. So make sure the contacts at your customer's organization are media-savvy and ready and willing to be interviewed.

If one of your customer stories has received media coverage, be sure to let everybody know. Mention it in a press release. Even better, post the complete on-line or print article, or the video footage, on your company's Web site, under a menu with a title like "Press Coverage" or "Media Coverage." This can attract even more media attention, not to mention prospects for your products or services.

10: Current Customers

Sales forces typically use case studies throughout the sales cycle, from lead generation through the close of sale. But they shouldn't overlook the benefits of communicating customer stories to *current* customers too.

Case studies can improve customer retention rates by helping your company sell existing customers other products and services, or more fully-featured versions of the ones they're currently using.

Case studies can help boost customer retention rates.

Don't assume that they're aware of your other offerings. They may not be, especially if your organization is large and diversified. **Case studies are a great way to educate them.**

These customers may not only be prospects for some of your other products or services. **They can also give you referrals to other company contacts who may become customers**, especially after they see your case studies.

You'll have even more credibility if you can **show prospects a customer story from another department or division of their own company**, rather than from some other business.

Even customers already profiled in your existing case studies can be prospects for other products and services. And since they've already been willing to be subjects of case studies, they're likely to be receptive when you show them stories featuring other customers.

On-line customer forums are another great way to connect with current customers. Encourage them to submit their own stories, so that they can be read on-line by other forum members. These submissions can also, in some instances, be expanded into full-length case studies—with your customer's permission, of course.

11: Sales Training

Before salespeople go out into the field to make sales calls, they need to have faith in what they're selling. Customer stories can help pump them up and get them energized about your company's brand, products and services, leading to higher conversion rates and sales volume.

That's why **it's vital to use customer stories not only in the sales process, but also during sales training.** Salespersons need to understand how their products or services are actually used by customers to solve their problems.

They should also know how to find case studies when they need them for a particular customer. The stories should be easy to access for use on sales calls. A good location is your company's Intranet site. **They should be available in all the different formats that salespeople may want to use with prospects,** including:

- Text
- Video (streaming & DVDs)
- Audio (streaming, MP3s & CDs)
- Podcasts
- PowerPoint

Case studies should be classified and accessible by salespeople in several different ways, including:

- Product or service
- Industry
- Company size
- Type of customer contact (e.g. technical, executive, etc.)
- Geography

Salespeople must understand their customers' needs and which results and benefits they're seeking. Then they have to be able to find case studies that match those needs. The best time to give them all that information is during sales training.

Case studies can help salespeople develop more enthusiasm for the products and services they sell, boosting conversion rates and

12: Employee Orientation & Communications

While you're leveraging your case studies with your customers and your sales force, don't miss the chance to do the same with your other employees. **Even those who have no direct contact with customers can benefit from learning about the ways your company's products and services help customers solve their problems.** In turn, your company will benefit from having motivated employees.

Case studies can help instill employee pride, by showing them how their company provides value to its customers. Customer stories should be incorporated into employee orientation programs. These programs are intended not only to give new hires the information they need to do their jobs, but also to validate their decision about the organization they've joined.

Keep employees motivated, committed and productive by telling them customer success stories.

It's important to keep employees excited and committed once they're on the job. An energized employee is a more productive one. **So make case studies part of your internal communications too.**

Employee newsletters often profile deserving employees, but neglect to do the same for customers. **Showcase at least one prominent customer story in every issue of your employee newsletter.** In some cases, you may be able to combine stories of employees and the customers they serve.

If you have an employee video news magazine, add some customer stories to that too. Photos and footage of customers can help make your company's business less abstract and more personal to your employees.

Educating and informing employees is important to productivity, but so is motivating them and boosting their morale. They need to know that they work for a company that makes a positive impact. Customer stories are a great way to do this.

An Invitation

These 12 applications for case studies can produce concrete results for your company. But they are by no means intended to be a definitive or comprehensive list.

Customer success stories are extraordinarily adaptable. The ways of leveraging them to grow your business are limited only by your imagination and creativity.

If you or your colleagues have discovered some effective new ways to put case studies to work for your company—or have any comments or suggestions about how to upgrade this report—contact me right away and I'll try to incorporate them in my next edition.

All the best,

A handwritten signature in black ink, appearing to read 'Richard Bellikoff', written over a horizontal dashed line.

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Richard Bellikoff's writing



Richard Bellikoff is a highly versatile and experienced independent writer. For over two decades, he has helped businesses fulfill their marketing, sales, training, and strategic and executive communications needs, in order to maximize their business value.

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With a BS degree in chemical engineering and an MBA in finance, he's well equipped to deliver marketing collateral, white papers, case studies, speeches and presentations, op-eds, advertorials, executive ghostwriting, corporate histories, audio-visual scripts, radio & TV commercials, direct response TV, business plans and proposals, and much more.

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