ACTIVITY

Case Study Template

USE THIS TEMPLATE TO EXPLAIN AND SHOWCASE YOUR WORK WITH CLIENTS

General Information

Outline
Case Study Title

Customer
Customer Name

Company
Company Name, if applicable

Industry
Customer Industry, if applicable

Video
Link to video, if applicable

Author
Name of Author

Date
Publish Date

Case Study Information

Case Study Title

Make sure the title runs for 70 characters or less. Try and hint at what you achieved!

Instroduction

Lead into the post with a short introduction (approximately 100-words). Be sure to highlight:

- *The customer's name and a little bit about them and/or their business.*
- *The opportunity the customer saw in your company and what pain point of theirs you addressed.*
- *One or two key successes the customer had after working with your company.*

The Story of (Customer Name)

In this section, provide a more in-depth overview of your customer. If it's a business, talk about the company's background, industry, and any recent successes or milestones they have had.

The ("Challenge" or "Opportunity") of (Challenge/Opportunity the Customer Faced)

Explain the challenge or opportunity the customer faced before they did business with you. This could be either a reactive reason (i.e. the customer had an issue that needed to be addressed) or a proactive reason (i.e. there was untapped potential that was unleashed by working with your business).

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Why (Customer Name) Chose (Your Company Name)

In this section, speak about the decision process of your customer. Speak about how they discovered you, who else they considered, and what made them ultimately decide to do business with you.

How (Your Company Name) Responded

Here, explain what happened once your business started working with your customer. What was addressed first, and why? How did your customer feel about working with you in the early days? Discuss any hiccups along the way and how you dealt with them.

The Results

In closing, speak to the results your customer saw after working with you. This section can be supported by statements, quotes, visuals, graphs, and metrics. Whatever you decide to include, be sure it illustrates how much of an impact your company made on your customer.

Call-to-Action

Use this section to encourage readers to get in touch with your sales team if they want to see the same results themselves. Ideally, a link to the sales page, an embedded form for connecting with your sales team, and/or your phone number would be here.

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Checklist before Publishing

- [ ] *Did you run the case study by your customer (and if applicable, your customer's account manager) for approval?*
- [ ] *Does your case study clearly identify your customer's need, your company's process for addressing those needs, and the overall results?*
- [ ] *Are approved, compelling, and relevant customer quotes woven throughout the case study?*
- [ ] *Are important success metrics that illustrate the impact of your product/service emphasised in the case study, occasionally with charts and/or graphs?*

Checklist before Publishing

- [ ] *Is there a clear call-to-action for interested readers to learn more about how to achieve similar results themselves?*
- [ ] *Is the post 750-1,000 words at minimum?*
- [ ] *Has a colleague read through the case study with a fresh pair of eyes to provide feedback?*
- [ ] *Have you presented the case study in a way for people to easily digest and understand? For example, a well designed PDF, page on your website or presentation?*

ACTIVITY COMPLETED

Well done!

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