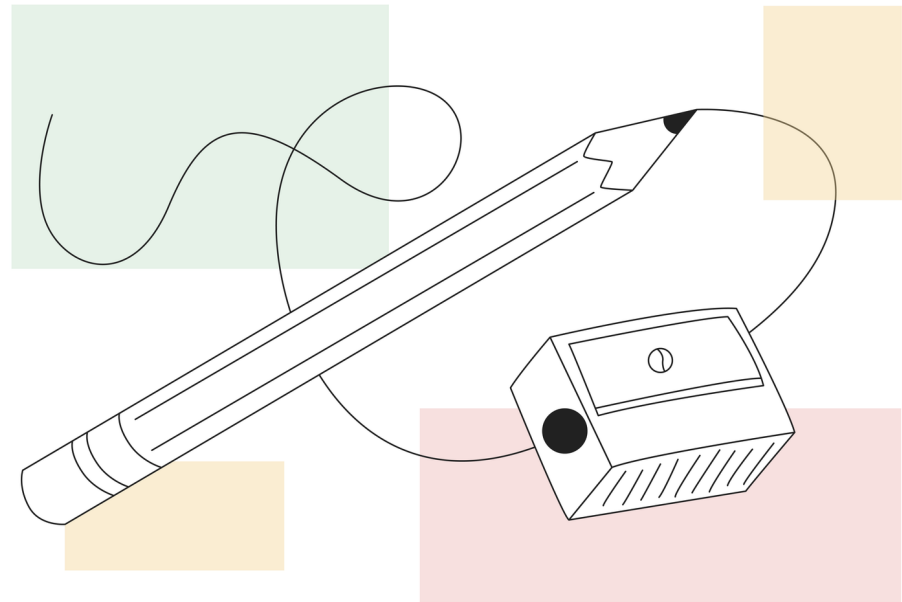


How to run an effective customer evidence and case study programme

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19 January 2022



What is a case study?

Proof. That you can deliver what you promise. That it works for customers. That you have happy clients.



Building a pipeline



Case studies are a team effort

Enlist and incentivise sales team

We have an OKR for reviews and case studies, KPI dashboard to track them

Build into contracts

Workflows and processes (e.g. built into NPS workflow)

Copyright

We retain copyright on our work until you have paid us for it. We love to show off our work, so we reserve the right to display all aspects of our creative work, including sketches, work-in-progress designs and a link to the final output in our portfolio and in articles on websites, in magazine articles and in books. We may also use your logo on our website to indicate that you have been a customer. The backlinks may help your Google ranking, so there's something in this for you. Plus, you'll be in good company.

Automate your follow-up actions

Set up actions that are triggered by a contact's survey response. Perhaps you'd like to send a follow-up email to unhappy customers to schedule a meeting with you to discuss their issues. You can also use the [Workflows](#) tool if you'd like to build more advanced automation. [Learn more](#)

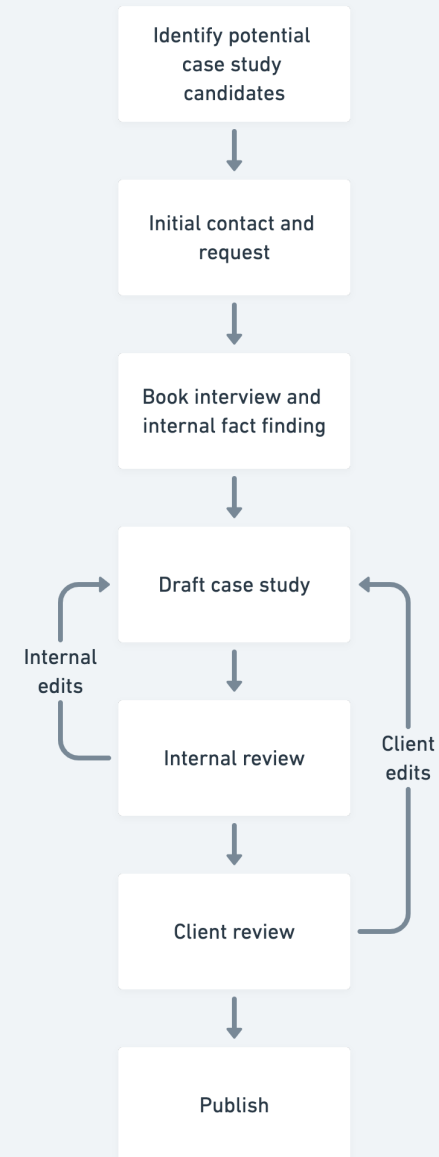
The screenshot displays a workflow automation interface with three trigger conditions and one action:

- Trigger 1:** "When a survey response is" with a red dot and "0 - 6 Detractors". Below it is a "+ Create workflow" button.
- Trigger 2:** "When a survey response is" with an orange dot and "7 - 8 Passives". Below it is a "+ Create workflow" button.
- Trigger 3:** "When a survey response is" with a green dot and "9 - 10 Promoters". Below it is a "+ Create workflow" button.
- Action:** A dropdown menu labeled "1. Send email" with an "Actions" dropdown arrow. Below it is a blue link "NEW Social Media Email 1 (For review)" with an external link icon.



Identify

- If you want one case study a month, you need to have a list of three candidates
- If you want one case study next month, you probably need to start now
- We have standing agenda item in our management meetings



Recruit

- Ask nicely if you want interviews
- Keep them short
- Use a meeting link
- Don't call them interviews!
- Offer review or approval
- Identify blockers early

Hi [NAME],

I saw your [STATUS CHANGE] and I am writing to ask if you would help us with a case study.

We'd like to set up a brief phone call to learn more about you, your organisation and how we helped. We'll write a short case study for your approval and then publish it on our website. It's a great way to celebrate your business and raise your profile.

If this sounds interesting, please book up a time for a call using my online calendar: [insert link]. If you have any questions, please contact me.

Best wishes,

[Sender's name]

[Meeting link]



Incentivise

- Share copy with client for their use
- Reputation enhancement
- Backlinks
- Modest incentivise or thank you's

We're aiming to plant a feedback forest

We send good things

Sign up to our newsletter and we'll plant a tree on your behalf.

Email address

[Subscribe and plant a tree](#)



Your tree will be planted in Madagascar by the Eden Reforestation Project.



Engage

Once someone has agreed to help, it's nice to confirm the interview and perhaps share some initial questions or topics. Also nice to write and say thank you.

Tip: Use HubSpot email templates and sequences

[Note it's important to avoid using the word 'interview' with the interviewee. Interviews are scary. Conversations are fun!]

Hi [NAME],

Thank you very much for agreeing to help with our case study.

[If already booked] I'm writing to confirm our call on [TK DATE AND TIME]. [I will call you] [We'll use my online web conference link: TK LINK].

[If not booked] You can book up a time for our call using my online calendar: [insert link]. [Or suggest two or three times for the call.]

If you have any questions in the meantime, please let me know.

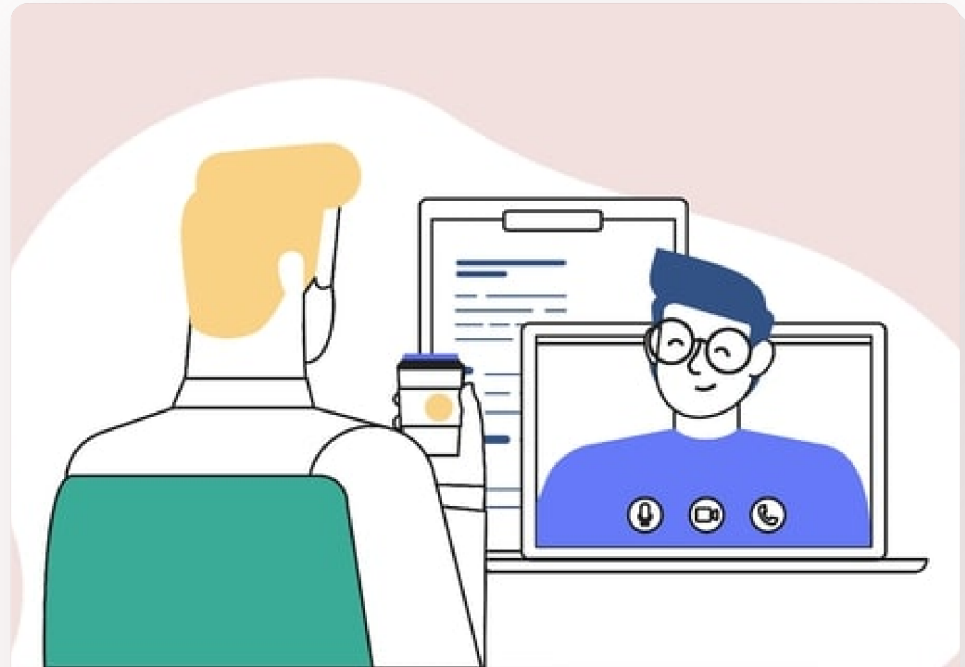
Best wishes,

[Sender's name]



Interview

Covered in great detail in my article ([link](#))



How to interview someone like a
journalist

www.articulatemarketing.com



Common challenges

(And how to overcome them)



Approvals

- Default or deemed acceptance
- Anonymising the case study
- Gentle chasing
- Beware the gatekeepers (e.g. PR, legal)



Frankenquotes

A frankenquote is not something someone actually said but something a writer pretends they said.

They never ring true. Better to use reported speech or get a real interview. Shorter quotes are generally better than longer ones



Unrealistic expectations

For example, some clients want impossible-to-get ROI figures and other data in case studies

- Approach the interview looking for the truth
- Find the win in the story, even if it isn't 1,200% ROI in six months
- Authenticity is more persuasive than BS
- BUT if you can get support data, that will help

More traffic, more high quality leads

+800%

increase in traffic

4000

sessions on average per month

+1400%

increase in leads

400

active contacts in the database

+3300%

increase in CTAs viewed

80

sales sequences engaged with



If you think it's hard doing case studies in-house, it's even harder doing them as an agency (but we take away the pain and do them as a turnkey service)

It's like Ginger Rogers and Fred Astaire...





**GINGER ROGERS
DID EVERYTHING
FRED ASTAIRE DID
BUT BACKWARDS
AND IN HIGH HEELS**



Writing compelling case studies



Typical structure

Title

Standfirst

Pull quote

Introduction

Problem

Solution

Working with company

Benefits

Conclusion



<p><u>Title</u></p>	<p>5-10 words Generally best to avoid a title that is too long but also avoid gnomonic, clever or jokey titles. Usually includes the supplier and customer names and sometimes the names of the main products, services or solutions used. Usually H1 or large bold text.</p>	<p>Avanade upgrades point of sale system for Swedish retailer</p>
<p><u>Standfirst</u></p>	<p>Typically a short 20-30 word synopsis of the story. If you read nothing but the title and standfirst, you should have a pretty good idea of the story with out reading the rest of the piece. It's usually bolder or larger than the rest of the text.</p>	<p>Avanade's new in-store online retail system replaces an older, bespoke system that was difficult to maintain and difficult to use. The new system improves customer service and reduces support costs.</p>
<p><u>Pull quote</u></p>	<p>Case studies often have a customer quote standing along at the beginning of the story. Best to avoid 'frankenquotes' and try to find something short, pithy and positive to say. Avoid quotes that are too long, aim for 10-20 words. You can sometimes use a pull quote instead of a standfirst. Give the name, title and company name of the person giving the quote. Usually in italics.</p>	<p><i>"Avanade helped us modernise our retail IT and this meant lower costs and better customers service." - Johan Tömmervik, IT director at Systembolaget</i></p>



<p><u>Introduction</u></p>	<p>The introduction usually includes a brief biography of the client company - who are they, where are they based, what do they do etc. and, where appropriate some context about the problem they were trying to solve. Try to keep sentences short and punch to draw the reader in.</p>	<p>Systembolaget has 410 stores in Sweden that sell alcohol. However, they are the only 410 stores in the whole country that sell it. The not-for-profit company has a legal monopoly on the demon drink. The intention is to minimise alcohol-related problems.</p>
<p><u>Subheading</u></p>	<p>3-5 words that summarise the problem or business challenge. Usually bold or H2.</p>	<p>Out-of-date systems</p>
<p><u>Problem</u></p>	<p>Explain the problem or business challenge that the client was facing. This should create a bit of tension for the reader which you can resolve with the rest of the case study. It's often useful to introduce a 'when' at this point. Also, if your case study interview yielded a good quote on the problem, this is a good place to introduce the client spokesperson.</p>	<p>In 2006, Systembolaget decided to upgrade its point of sale system. Their existing system did not allow stores to take chip and pin credit cards. In addition, the old system only had basic functions for ordering products that were not available in a given store. The company wanted to give customers the ability to order products in stores using a friendly e-commerce-like system. (At present the company cannot sell online by law.)</p>



<u>Subheading</u>	3-5 words to preface the solution. Often this just includes the vendor name and the word 'solution'	The Avanade solution
<u>Solution</u>	What did the supplier did to address the problem outlined earlier on. Try to keep this factual and avoid hype and sales language. Factual descriptions are often more credible than something that reads like an advert.	In 2007, Avanade started work on the project, alongside other contractors who worked on other elements, and developed the entire customer service function. This included online ordering, inventory and search functionality. Built on a foundation of standard Microsoft software including .NET and Microsoft SQL Server 2005, the system plugged into Systembolaget's existing back-end ERP software.
<u>Working with supplier</u>	If there was anything interesting or unusual or if there is a really strong customer quote, it's good to include a short section about the relationship between the supplier and the customer. It usually dovetails into the solution section.	Tömmervik again: "Avanade has contributed very well to this present project because they have technically skilled consultants. They have been very customer-focused and they got things done very quickly."



<p><u>Subheading</u></p>	<p>3-5 words to preface the final section of the case study. It can be as brief as 'Benefits' or 'Business benefits' or a bit more descriptive.</p>	<p>Benefits for Systembolaget</p>
<p><u>Benefits</u></p>	<p>In the benefits section, ideally, you want the customer to sing the supplier's praises and explain how the solution solved the original problem and delivered real benefits. Quotes and hard facts - increased profits, shorter time to market, greater ROI - are very helpful here. Don't be afraid to mix reported speech, direct quotations and editorialising comment. But avoid lengthy quotations. A bullet list or an itemised list of benefits can be easier to read than long paragraphs if there is enough material</p>	<p>Standardisation is one of the main benefits according to Johan Tömmervik, IT director at Systembolaget. "Our previous system included a lot of bespoke enhancements and unique developments for us." The new system, in contrast, is more flexible, cheaper to maintain and easier to upgrade in future. Avanade's ability to integrate different Microsoft technologies was vital. "The Microsoft offering is a complete offering," adds Tömmervik, "We don't have pick solutions from different vendors."</p>
<p><u>Conclusion</u></p>	<p>Pivot from the benefits to the conclusion with either a strong quote from the customer, a powerful statistic or data point, a comment about what happens next (e.g. the next project or engagement) or something that generalises the specific benefits listed earlier (as in this case)</p>	<p>As he explains, Systembolaget's mission is to sell alcohol not to be an IT shop. Building a solution, as Avanade has done, from standard components means that the retailer can continue to develop it using third party expertise.</p>



Other formats

- Simple quotes
- Win cards (<150 words)
- Internal-only case studies
- Article-style pieces
- Deeper technical case studies



How Wellington
College transformed
its learning
environment with
Microsoft Surface
and Autopilot

PDF



Using case studies



Reviews

Endorsements on third party sites can be very powerful

- Google Reviews
- Clutch.com
- Apple Podcasts

For us, reviews on the HubSpot partner directory are super-important.

The screenshot shows a review interface with an overall rating of 5.0 stars based on 20 ratings. A horizontal bar chart shows 100% of reviews are 5 stars, with 0% for 4, 3, 2, and 1 stars. Below the chart is a search bar and filter options for stars, industries, and company sizes, along with a 'Sort: Newest' dropdown. The review itself is a 5-star rating from 21 Dec 2021, titled 'Above Board'. The reviewer, Joe Zajac, is from the Electrical Electronic Manufacturing industry and has 11 to 25 employees. The review text praises Articulate for meeting deadlines and expectations, and lists services provided such as branding, website design, and migration.

5.0
★★★★★
Based on 20 ratings

Overall rating

5 ★	100%
4 ★	0%
3 ★	0%
2 ★	0%
1 ★	0%

20 Reviews

Filter reviews: All stars ▾ All industries ▾ All company sizes ▾ Sort: Newest ▾

★★★★★ 21 Dec 2021

Above Board

I couldn't be more impressed with Articulate. Although we are a smaller company, we felt we were treated as a Fortune 50 client. They were clear with deadlines, deliverables, and expectations. We even got our project completed in the allocated timeline--how often does that happen! We were migrating an old website to an updated one out of HubSpot CMS and we love our final product. We're excited for the power Articulate has given us and will certainly keep them in mind going forward. I highly recommend to anyone considering.

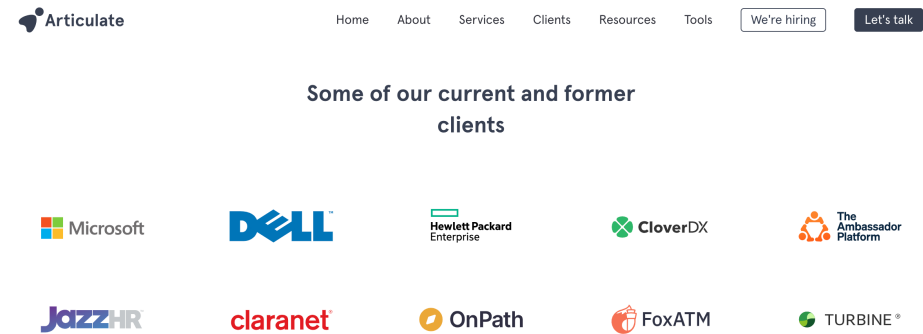
Services provided
Branding, website design, website migration, crm implementation, crm migration, and full inbound marketing services

Joe Zajac | Electrical Electronic Manufacturing | 11 to 25 employees



Logo tombstones

Often, all you need is a recognisable logo



Customer quotes

A step up from a logo



"We recommend Articulate for at least three reasons: they absolutely master their craft, they are a pleasure to work with and they are not just "doers" but great advisors. Thanks to their great knowledge of HubSpot, they handled specific requirements for our website single-handedly."

Vincent Lambercy

FoxATM













Win reference library for sales

Short, internal-only mini-case studies for sales team

We use Notion to build a searchable database by client size, type, services delivered and so on.

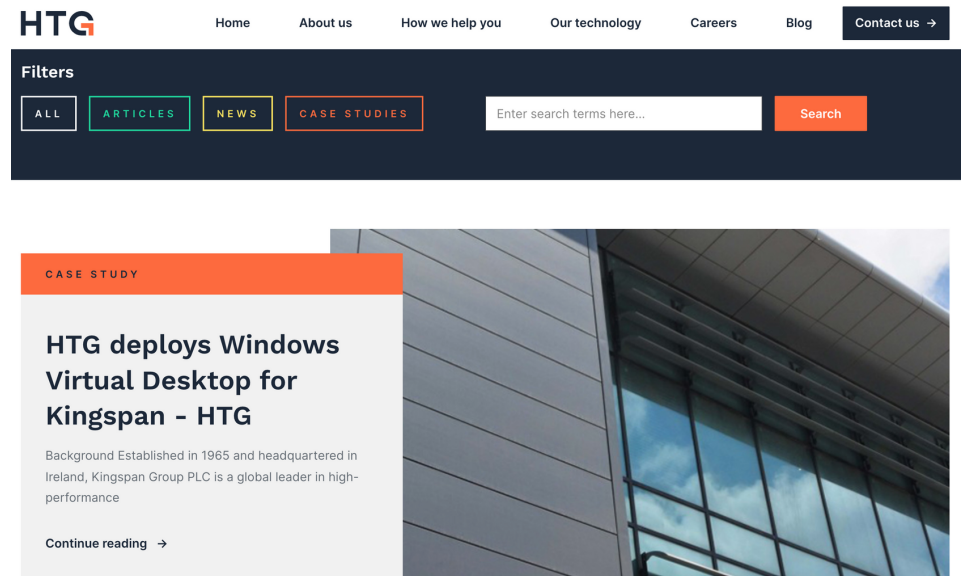
Articulate wins Simple... ▾

	AND.digital HubSpot website migration	Mid-market
	Azured launchpad	MSP
	Beyond Encryption bespoke website and sales enablement	Mid-market
	Centiq Nucleus website and retainer	Mid-market
	Chemaxon sales collateral	Mid-market
	Claranet marketing strategy and content retainer	Mid-market
	Dell case studies	Enterprise
	HPE Healthcare white paper	Enterprise
	HTG marketing retainer and website	MSP
	JazzHR content retainer	Mid-market



Blog

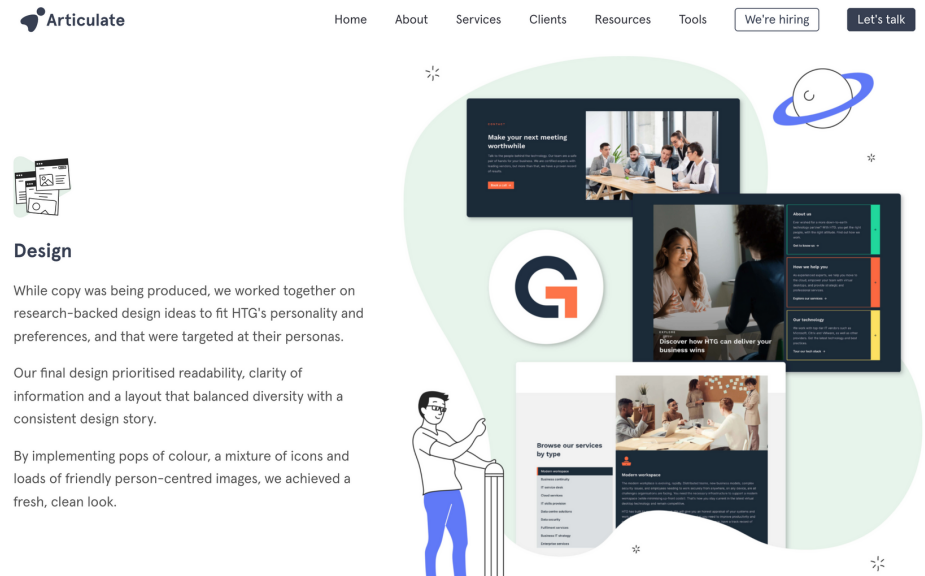
There are good arguments for using your blog to host case studies



Standalone pages

We're increasingly building ours as standalone pages so we can add more design elements and layout

Also /case-studies/ URL path
BUT you need a reasonable number to avoid it looking like a ghost town



Gated PDFs

We recommend against gating case studies

Why hide your light under a bushel?



Sales emails

This is arguably the most valuable use of case studies

Tip: Use HubSpot documents to see who opens them and HubSpot templates and sequences

Name: JazzHR case study | **Owner:** James Dhakal

Subject: Hi **Contact: First name**, our results, and how we help companies | **Shared with everyone** | **No folder**

Hi **Contact: First name**,

It's easy for us to claim that we can get you results and establish thought leadership in your niche, but what's our track record like?

This **case study** demonstrates how we helped JazzHR increase their inbound lead generation by 20%.

We wrote them an ebook that quickly became their top performing offer, but we didn't stop there. One of our blogs won them an industry award.

Interested in getting those results for your business?

B I U T More | **Personalize** | **Insert**

And finally...





Let's talk

Video and slides appearing soon on articulatemarketing.com

Email me with questions at matthew@articulatemarketing.com

Book a call with me: www.articulatemarketing.com/meet

