

# How to Write a Case Study

## 7 Step Cheat Sheet

### 1) Find a Potential Case Study Customer

Identify customers that get exceptional value from your product or service. It could be ones that post glowing reviews, have particularly high usage of your product, leave positive comments on your social media accounts, or those identified by your sales or customer support staff. Make sure everyone in your business knows that you're on the hunt for potential case study customers. Keep a running list of customers that might be great candidates.

### 2) Ask Permission

With your list of potential case studies in hand, get on the phone and [have a conversation](#) with your customer about their experience with your business. Gauge their satisfaction and if they still seem like a great candidate, explain that you're looking for a handful of case studies. Emphasize that it will be great exposure for them, and also that you'd really love them to be involved. If they agree, lock in a time for a slightly longer interview. Explain that it will take about 20 minutes, it'll be you doing the write-up, and they'll have a chance to check everything you've written before it's published.

### 3) Have a Phone Call to Conduct the Case Study Interview

At the agreed time, get on the phone with your customer. Tell them you'll be taking notes during your discussion so that you can catch specific phrases they use (to include in your case study).

Have a list of customer case study questions on hand but try not to read out the questions. Instead, allow the conversation to flow freely and ask questions as they naturally occur. Come back to these questions if you haven't got to them all through the normal course of the conversation.

At the end of your case study interview, thank your customer for their time and assure them that you'll write it up and email it to them for checking in the next few days.

### 4) Questions to Ask in a Case Study Interview

These will vary depending on your business, but a few samples are;

- Talk me through the very first time you ever thought about using a solution like ours
- Can you describe what was happening before you used [our business]? (You need to get the "before" scenario to provide a contrast.)
- What prompted you to contact [our business]? How did you find us? Why did you choose us?
- How would you describe your experience with [our business]?
- What did you initially think? How did your friends/customers/partners react?
- How did [our business] compare to other alternatives you had previously tried?
- What's your philosophy for dealing with this problem/issue now?
- Would you recommend [our business] to others in the same situation as you? Why/why not?

There might also be other questions specific to your type of business that you should add to this list.

## 5) Write up your Case Study

Once you're off the phone, have a first shot at drafting the case study straight away. A direct quote from the customer can be a good way to start, and then go into the back-story about what situation they were in before using your business. Don't make them sound inept or in anyway negative otherwise the customer won't be happy to have the case study published. Try to make the customer sound reasoned and relatable. Describe their situation and thoughts in as much details as possible.

Then introduce your business - especially the customer's thought process on how they came to use your business. Describe what you did, and importantly, the results the customer achieved. Ideally, you'll use another direct quote from the customer somewhere in this section.

Finish the case study off with some sort of quote that sums up your customer's opinion about your business and any recommendations they have for others in the same situation.

## 6) Check Back with Your Customer

Once you've got a written up your business case study, you need to permission to use it from your customer. Here's the exact email template I have used;

Hi <Customer Name>,

It was great to speak with you yesterday and I was so pleased to hear that everything is going well! I've now drafted up an article to explain your story and I've included this below. Hopefully I've captured the essence of what you said, but if you'd like anything changed, please just let me know (or make any edits below).

<Include the actual customer case study here>

As discussed, once you're happy with it we'd like to promote it in our emails, Facebook page, other marketing etc.

Thanks again for your help with this - it's very much appreciated!

All the best,  
<Your name>

## 7) Get a Photo for Your Customer Case Study

Although you're almost done writing your customer case study, for maximum impact, you need a good photo to go along with your business case study. Sometimes getting your customer to send this to you can be the hardest part of all! Make sure you mention it at the beginning, and sometimes I hold off on sending the case study through until they've sent me a photo. Having a good photo really helps make your case study relatable and brings it to life - so don't skip this step!