Writing a Case Study That Sells
The Workbook

This will help you build out a template for your case studies that you can use again and again to build huge amounts of trust with prospective customers, and get them buying.

The Principles of a Great Case Study

▶ Explains (in common language) the **results** you delivered for someone else, and teases at how you did it.

   ▷ The result can be either some sort of **pain reduction** (reduced customer complaints) or **pleasure gain** (more customer conversions).

   ▷ It's important to focus on **results**, *not* deliverables.

▶ Clearly explains **your contribution** to the solution.

▶ Make an **impact** with the title to hook readers in.

▶ **Proves** that you actually achieved the results somehow.

▶ Easy to read.

   ▷ Ideally, it would be **highly-visual** (to ease the process of digesting everything).

   ▷ Use natural language, like you were talking to a friend.

▶ Includes some sort of **testimonial** from the client or customer.

> ℹ It's usually easier to build these case studies *while* you're doing the project. This will keep you focused on results.

Results, Not Deliverables

It's really easy to get wrapped up in what you've *done* for a customer, rather than the results you've helped them achieve. People generally don't care about deliverables — **they want to see *results***!

Here's how to transform common deliverable types into result-centric statements…

Web Design

"We designed a stellar new website that looks great on mobile devices!"

→

"With this new site, ACME Inc saw a dramatic **decrease in bounce rate**, which resulted in an **increase of $50K** in monthly recurring revenue."

SEO & Inbound Marketing

"ACME Inc. was featured in over 20 major publications and is ranked #1 on Google for their key search terms."
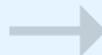
→

"Due to our campaign, ACME Inc. is receiving **40K new unique site visitors** each month, which translates to 1,000 new paying customers each month, or **~$200K in MRR**."

Created by marc@clarityfirst.co

Results, Not Deliverables, cont.

Page Load Time / Performance

> "After installing our caching tool, ACME Inc. saw their initial page load time reduce by 5 whole seconds!" ✗

→

> "Our tool helped ACME Inc. speed up their initial load time, which resulted in **30% less cart abandonment** each month, totaling **$36K in reclaimed revenue** each month. ✓

An Automated Reporting Tool

> "ACME Inc. now has open access to hundreds of reports that help them see inside their business." ✗

→

> "In addition to saving **~2000 hours** of manual labor each month (**~$100K in cost-savings**), our reporting tool helped ACME Inc. uncover internal inefficiencies that were costing them **$750K in overhead** each month." ✓

ℹ Yes, it can often be very difficult to get exact numbers at first. This is why you have to *start with the case study in mind.*

When you bring on a new customer, figure out how to measure success *beforehand.* This will make your projects more lucrative, and you can point to **tangible** ways you helped them out in your case studies.

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Making an Impact with the Title

You probably have *some* idea of how to reposition " the thing you do" for customers as "the results you get" for customers (if not, no worries! We've got another exercise later).

Now, we're going to build a juicy title that'll hook people in to read your case study in the first place.

Here's the template you'll use:

"How we helped [COMPANY_VERTICAL] generate [MONETARY_IMPACT] by [HIGH_LEVEL SOLUTION]"

If the company is well-known, use their name instead of their vertical (i.e. "Nike").

You'll end up with a couple of titles you can use:

> How we helped a **healthcare company** generate **$5M ARR** by **optimizing their sales funnel**.

> How we helped an **IT staffing firm** save **$500K annually** by **automating their sales outreach** process.

> How we helped a **web design agency** close **$100K worth of new business** with our **proposal-design tool**.

> How we helped a **law firm** bill **$50K worth of addl. hours** each month with our **on-demand staffing platform**.

The Anatomy of a Killer Case Study

Here's what a great case study looks like in the flesh! Use this as an example (or just steal if for your internal templates).

How I helped an email security tool to close $60K in annual revenue by optimizing their site for conversions.

This lets you give some Context to help people understand why you were hired in the first place (and see if they're in the same place today).

> The Problem

ACME, Inc. was suspicious that their website wasn't pulling its weight. Having just invested quite a bit in some paid traffic in January, ACME didn't see much of a return on their campaign.

Use natural language that most people can understand to boost readability.

Frustrated, they came to me and asked me to take a look at their landing pages.

> Our Approach

Give people a sneak peak of your onboarding or solution process.

As always, I went straight to the root of the problem: we interviewed their customers.

It became clear that there was a definite need for the solution ACME was providing, though very few of them were aware that a solution already existed.

This told me that there was clearly some messaging issues on their landing page somewhere!

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I continued to talk with customers, trying to really understand the pain they were trying to cure with an email security tool.

Turns out, they all wanted one thing: *peace of mind.*

> Here's where you start to share a little bit of your secret sauce with the reader.
>
> Help them understand what you actually did (the deliverables).

> The Solution

Since I knew there was a messaging issue, I didn't think that a full redesign was necessary. Instead, I just tweaked some of the text on the site to make the value proposition more clear.

I also re-arranged the content on the main landing page so that it was presented *riiiight* when customers wanted it, so they'd continue to scroll down the page.

After A/B testing things and monitoring user behavior in Hotjar, Imade a few smaller tweaks and set them up with a CDN to improve their page speed substantially.

> **This is what people came to read.** Make sure that you're making this as explicit as you can, and embellish it with images when possible.

> The Results

When I finished, ACME was *shocked.*

They were seeing people fill out contact forms in droves, and (more importantly), all that ad spend was converting into new customers like mad. They ended up closing $60K in MRR from this campaign alone...I should have charged royalties...😉

> Don't be afraid to include humor in your studies. Remember: your readers are not robots!

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It's important that your readers understand that the results were attributed to your contribution (assuming they are!).

As you can see, it was quite easy to attribute these conversions to my efforts.

Here's what things looked like before I came in:

Break-even point

Jan 2019   Feb 2019   Mar 2019   Apr 2019
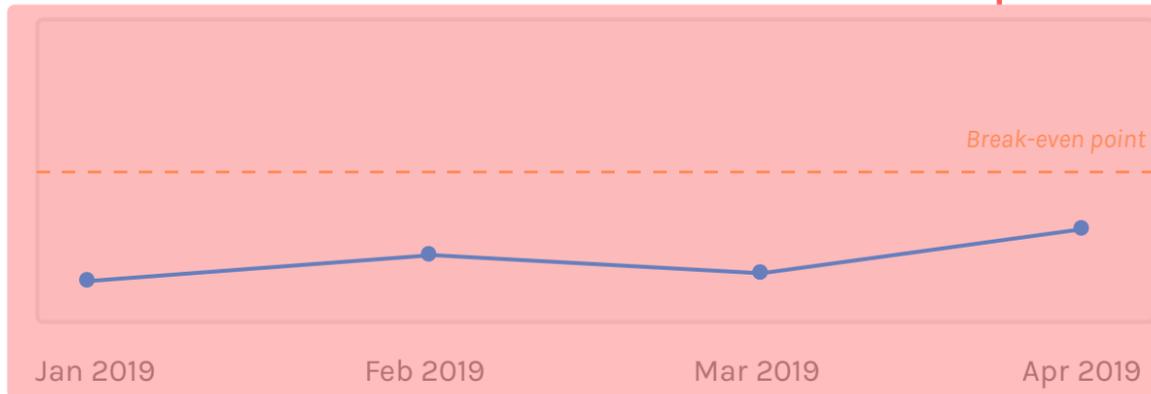
Before and after screenshots of tools like Google Analytics are the gold standard, just be sensitive and ask your customers if you can share this.

…and here's after I worked my magic:

When I was brought in   Break-even point

May 2019   Jun 2019   July 2019   Aug 2019
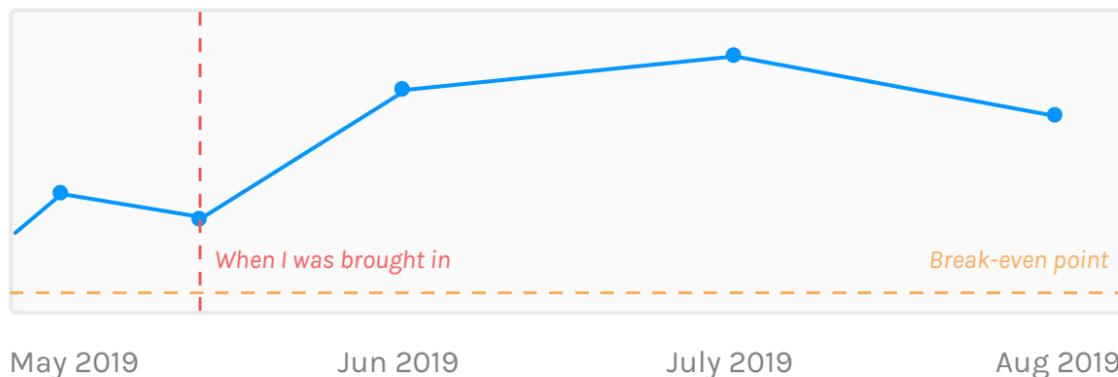
But what about the folks at ACME, Inc? How did they like it? Sure, more money is great, but were they truly satisfied?

> "Initially I was hesitant, but after results like these I'll be sending as much work Marc's way as I can!
>
> — **James Patty**, CMO of ACME, Inc.

A results-oriented testimonial is the final nail in the coffin.

Bonus points for using video here!

Bringing it All Together

Alright, now it's your turn! **Type in the answers** to the questions below to start improving your case studies.

First, try to understand the results your clients get from working with you. Just list them all out in as much or as little detail as you'd like.

Go for it:

(Psst...you can type in these boxes)

Now, type a title (remember the template from the first few pages) that you can use for your next case study.

Go for it:

As you can see, this stuff is *really simple* once you wrap your head around it. It's just a matter of re-framing the content around results, and then explaining your process to get to those results to prospective customers in a simple, clean way.

I hope you found this useful. All the best in your case study-creation endeavors, friend!