

Ask an Agency: How Do I Create Client Case Studies That Work?

Creating a compelling case study doesn't have to be difficult. Here are some guidelines for delivering your best work.



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The case study. It's a humble deliverable — text and images designed to highlight success, to impress without showing off, to convince without selling. Case studies can be essential tools for any agency or product marketers; they're examples of past projects done right. But in order to really nail one, the story must be thoughtfully curated. Without intent and a framework, you have words without meaning and narrative without connection.

Creating high-quality case studies doesn't have to be difficult. The key is to understand their best practices and the watchouts, to know what and what not to highlight. What follows is a how-to that'll get you on your way.

Focus on human connection

The best case studies connect with the reader. Sure, they include the nuts and bolts: talking about the success of the effort, the intelligent problem-solving process, the complex technology that was used to develop a product or solution, the qualitative and quantitative improvement metrics, and more. But without highlighting the humanity of the project, its impact falls short.

Think of the case study as the medium, a way for a person to talk to another person. Human insights are what matters and what should drive the narrative. There can be a tendency to want to show off — to focus on, for example, how the technology is exceptional or the product is so elegant. But that's not the point. The point is how the human problems — the foundational existential issues — were addressed. Talk about those underlying human things. That's what makes stories compelling. That's what makes case studies resonate.

Tell a story

The *how* is less important than the *why*. Every company will have great numbers to tout or features and benefits to highlight. To stand out, be a storyteller. What differentiates one company's numbers from another's is how they talk about them. It's not just about having 37% fewer security breaches or delivering 10% higher ROI. It's about the foundational, the creation of a solution to an existential problem. It's about how having fewer data breaches builds customer trust and improving profitability enables critical growth and expansion.

Stats that highlight quantitative effectiveness are only useful when combined with elemental truths about the core narrative of the project. The same goes for heady quotes from executives about the great value their company achieved through the project. The case study shouldn't read like sleazy salesmanship. It should read like a story worth telling.

Be critical about your proof points

Examples in case studies need to show success, of course, but they also need to set expectations. Whether a company is trying to demonstrate the worthiness of their ideas, the worthiness of their software, or the worthiness of another offering, they need to prove they can do the work. A potential client wants to see that you can solve *their* problems, not someone else's. To that end, proof points that demonstrate flexibility and creative thinking > examples that are focused solely on finished products. Take a potential client on a journey so they can understand how they might join on a similar one. Trust the process *and* show the work.

Hold up a mirror

Everyone wants to feel seen. If a potential client can't see themselves fitting in with the companies you're talking about and the work you're producing, they'll be left wondering how their needs will ever be met. While not every case study needs to work for every client — if anything, avoid generalizing a case study *too* much — the best group of case studies will show a wide range of projects, clients, capabilities, and more.

Too often, case studies solely focus on the largest and sexiest client names. This excludes a host of potential clients with big aspirations, limited resources, and a bit of sticker shock when stacked up against the big leagues.

Though counterintuitive, the most noteworthy clients do not the best case studies make. And a good story that you believe in always wins.

Wrap it up (as we are here)

Simply put, great case studies showcase great work. Like many of the best projects, producing them is equal parts art and science. To confirm the work is complete, ask yourself the following questions:

Before launching a case study, ask...


- ☐ Does the case study go beyond the what and get into the why, showing how the work impacted the humans (<— big one) who were involved? (Better yet, give the case study to a colleague who knows nothing about the project and ask if they connect to the content on an emotional level.)
- ☐ Does the case study have a clear, compelling narrative through line that can be explained in a sentence or less? (If the case study was a movie trailer, what would the tagline be?)
- ☐ Does the case study show not just how one client's issue was solved, but demonstrate how that thinking could be applied to other potential clients?
- ☐ Is the case study a good addition to your pre-existing content, a new example of quality work?



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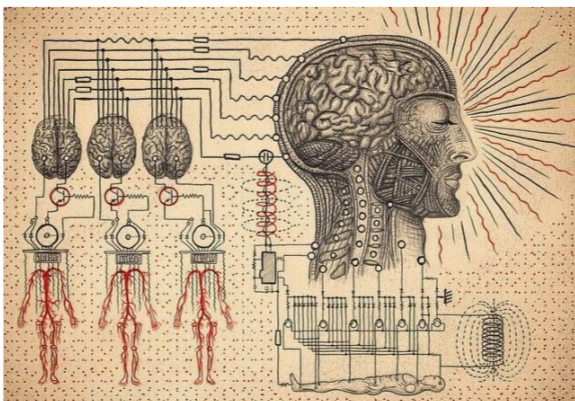
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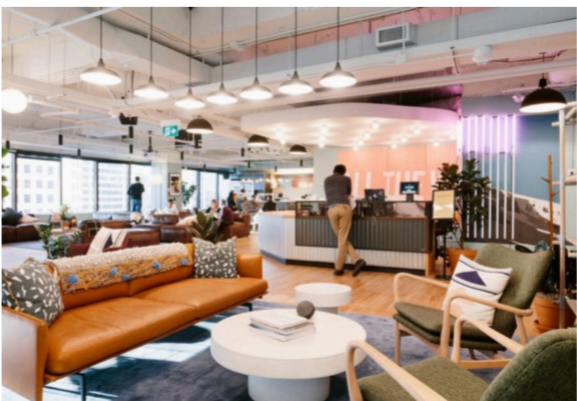
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