

How to Create Client Case Studies That Work

Guidelines for creating compelling case studies that connect with readers, tell meaningful stories, and showcase your best work without being sleazy salesmanship.

The case study is 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.

Focus on Human Connection

The best case studies connect with the reader. Sure, they include the nuts and bolts: the success of the effort, the intelligent problem-solving process, the complex technology, the qualitative and quantitative improvement metrics. 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 show off — to focus on 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. The case study shouldn't read like sleazy salesmanship. It should read like a story worth telling.

Be Critical About Your Proof Points

Examples need to show success, but they also need to set expectations. 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 are better than examples 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 wonder how their needs will ever be met. 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 potential clients with big aspirations, limited resources, and a bit of sticker shock. Though counterintuitive, the most noteworthy clients do not the best case studies make. And a good story that you believe in always wins.

Checklist Before Launching a Case Study

- Does it go beyond the what and get into the why, showing how the work impacted the humans involved?
- Does it have a clear, compelling narrative through line that can be explained in a sentence or two?
- Does it show not just how one client's issue was solved, but demonstrate how that thinking could be applied to other potential clients?
- Is it a good addition to your pre-existing content — a new example of quality work?