THE PROOF IS IN THE PUDDING: WRITING EFFECTIVE CASE STUDIES

Capitalize on your company's client success stories to win new business!

TABLE OF CONTENTS

people2.0

The Proof is in the Pudding: Writing Effective Case Studies

Capitalize on your company's client success stories to win new business!

Introduction

With all of the great things your firm accomplishes every day for your customers, there's likely never a shortage of successes to talk about when selling to your customers. However, it's not enough to simply say what you did for a client—you have to show it!

People want to be told a story that gives them the full picture: who the major players are, what happened, how everything turned out, etc. But how do you go about putting these instances down on paper, and further, turning them into useful pieces of sales collateral that can help win you new business?

Whether you're looking to enhance your current case study library, have RFP questions to answer, or are looking for a way to start incorporating case studies into your sales collateral, this eBook will teach you how to write for your audience, show you different ways to structure and present your success stories, and provide you with a process for writing effective case studies!

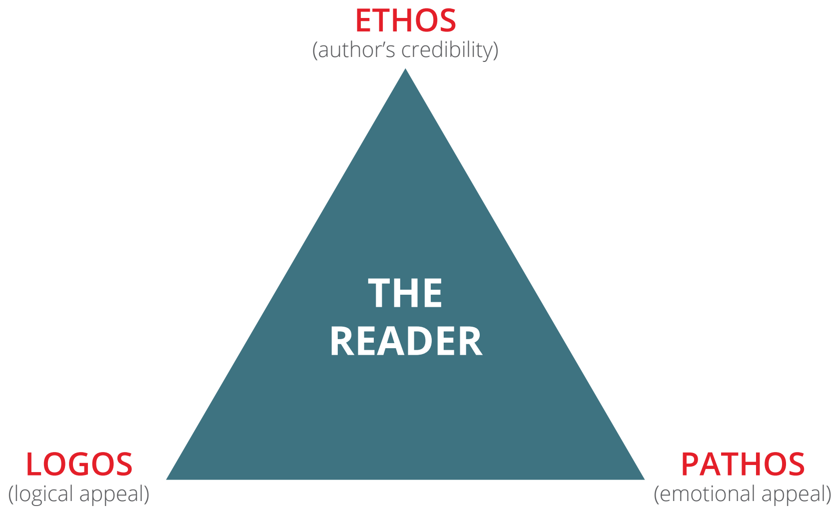
Utilizing Rhetorical Appeals

As a whole, a lot of business writing tends to be very internally focused; we're always looking for ways to talk about ourselves and all the great things we do. However, not only does that often detract from what customers want to know (i.e. what's in it for them), but the use of internal jargon and acronyms can leave them feeling confused and on the outside.

When writing any business collateral, the end goals are the same: to inform potential customers of the services you can offer, and persuade them to give you their business. As such, you have to position your success stories in a way that works to convince your reader, while properly demonstrating your company's value.

With your audience and goals defined, now is the time to start thinking about how you can accomplish these goals via writing. One popular strategy, when it comes to persuasive writing, is the use of Aristotle's rhetorical appeals: ethos, logos, and pathos.

- **Ethos**- ways you establish your credibility as an authority on a subject (e.g. education/certifications, your role in the company, years running your business, etc.).
- **Logos**- using facts and figures to demonstrate your point and appeal to reason (e.g. measurable KPIs, implemented processes, etc.).
- **Pathos**- using verbiage to illicit feelings in your reader that already reside within them (e.g. details about customer pain points).



Each of these devices keeps the reader fully in mind by anticipating what they're going to look for in your stories. Just like you need a solid beginning, middle, and end to keep their attention, the integration of your expertise, measurable successes, and knowledge of your client's issues helps provide a more detailed experience that future customers can see themselves fitting into.

Effective Case Study Layouts

When it comes to how to best convey your success stories, it's necessary to see what purpose it serves. For example, if a potential client asks you to provide a case study that can only be 500 characters, a full one-page write up isn't going to work. On the flip side, a couple sentences briefly explaining how you helped a client place 50 seasonal, temp workers in 30 days isn't going to offer any real insight on how you accomplished such an amazing feat.

The Winning Formula

While length and format may vary, a good way to ensure that you are writing for your audience, while incorporating ethos, logos, and pathos into your writing, is by following a simple formula: challenge › solution › results.

- **Challenge**- this section should address what issues your client was facing before they engaged you (e.g. high time-to-fill, poor quality-of-hire, lack of visibility into processes, high costs, etc.).
- **Solution**- this section should explain why your client ended up choosing you to overcome their challenges. Provide details of the benefits you've provided, and illustrate how you helped your client achieve their goals.

> *"It's quite an elegant little structure, actually — in just three parts capturing the extent to which one can be taken seriously as a partner.*
>
> *Challenge: do you truly understand my business? Solution: are you thoughtful in your approach? Result: are you measuring what matters?"*
>
> -Eric Tsytsylin, Brand and Creative Leader

- **Results**- this section should provide your reader with quantitative and qualitative details that demonstrate how your client has benefited. While you should include hard facts and figures (logos), you can also provide any quotes from your client that speak to how well you've improved their business (pathos).

Not only does this formula hit on everything your client needs to know to get the full picture, it also provides a defined beginning, middle, and end that helps your reader follow along.

While the challenge-solution-results formula should be applied to each case study, if you feel it is pertinent to the overall story, you can add other sections as needed (e.g. a "client profile" section before discussing their challenges).

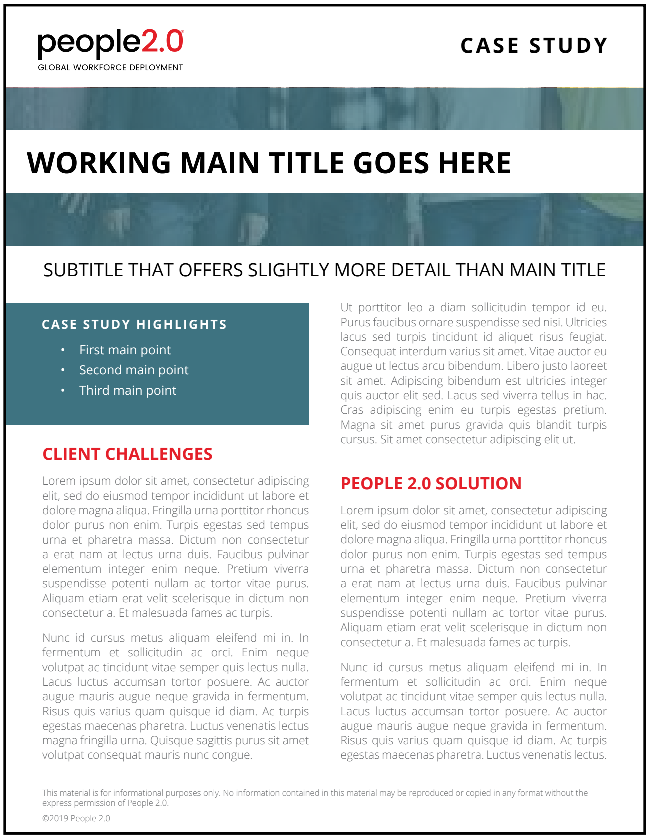
Ways to Present Case Studies

As alluded to earlier, case studies can vary greatly in length and format. Here are a few ways success stories are often presented:

- **Proof Points.** Usually the shortest and most concise way to present a case study, proof points are aptly name because they do what they suggest: get to the point! Following the challenge-solutions-results formula, each sections usually provides a one- to two-sentence explanation. Proof points are incredibly useful when answering RFPs with character limits, as well as PowerPoint presentations. Here's an example:
    - *Challenge*: Our large IT client was experiencing a high time-to-fill rate.
    - *Solution*: ABC staffing firm utilized innovative sourcing strategies, and created interviewing-process efficiencies to speed up the hiring process.
    - *Results*: Not only were we able to reduce our client's time-to-fill by 40 percent, we were also able to improve overall visibility into their contingent workforce hiring.

Creating an excel doc using different filterable categories (e.g. topic, client industry, date serviced, etc.) can help you more easily compile and search all of your proof points!

- **Formalized 1-2 Pagers.** This format is what you typically think of when you think of business case studies. Typically gated content on company websites, these case studies provide a more in-depth look into your clients' challenges, how your solution(s) worked to alleviate these problems, and any results that positively impacted their business. Formalized case studies can serve as attachments or follow-up collateral during the sales process, as well as a marketing lead generator. Here is an example of a formalized, 1-2 page template:



people2.0
GLOBAL WORKFORCE DEPLOYMENT

CASE STUDY

WORKING MAIN TITLE GOES HERE

SUBTITLE THAT OFFERS SLIGHTLY MORE DETAIL THAN MAIN TITLE

CASE STUDY HIGHLIGHTS

- First main point
- Second main point
- Third main point

CLIENT CHALLENGES

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Fringilla urna porttitor rhoncus dolor purus non enim. Turpis egestas sed tempus urna et pharetra massa. Dictum non consectetur a erat nam at lectus urna duis. Faucibus pulvinar elementum integer enim neque. Pretium viverra suspendisse potenti nullam ac tortor vitae purus. Aliquam etiam erat velit scelerisque in dictum non consectetur a. Et malesuada fames ac turpis.

Nunc id cursus metus aliquam eleifend mi in. In fermentum et sollicitudin ac orci. Enim neque volutpat ac tincidunt vitae semper quis lectus nulla. Lacus luctus accumsan tortor posuere. Ac auctor augue mauris augue neque gravida in fermentum. Risus quis varius quam quisque id diam. Ac turpis egestas maecenas pharetra. Luctus venenatis lectus magna fringilla urna. Quisque sagittis purus sit amet volutpat consequat mauris nunc congue.

Ut porttitor leo a diam sollicitudin tempor id eu. Purus faucibus ornare suspendisse sed nisi. Ultricies lacus sed turpis tincidunt id aliquet risus feugiat. Consequat interdum varius sit amet. Vitae auctor eu augue ut lectus arcu bibendum. Libero justo laoreet sit amet. Adipiscing bibendum est ultricies integer quis auctor elit sed. Lacus sed viverra tellus in hac. Cras adipiscing enim eu turpis egestas pretium. Magna sit amet purus gravida quis blandit turpis cursus. Sit amet consectetur adipiscing elit ut.

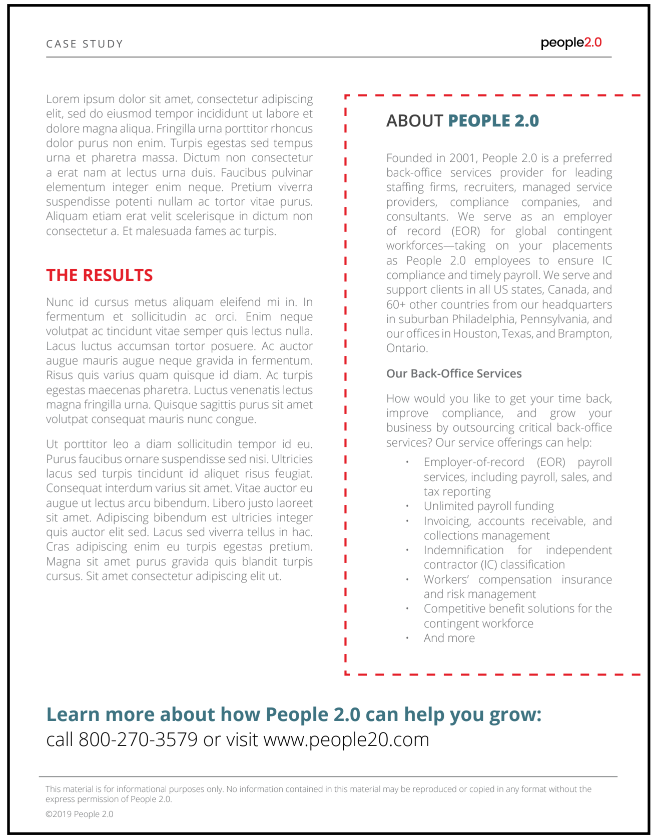
PEOPLE 2.0 SOLUTION

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Fringilla urna porttitor rhoncus dolor purus non enim. Turpis egestas sed tempus urna et pharetra massa. Dictum non consectetur a erat nam at lectus urna duis. Faucibus pulvinar elementum integer enim neque. Pretium viverra suspendisse potenti nullam ac tortor vitae purus. Aliquam etiam erat velit scelerisque in dictum non consectetur a. Et malesuada fames ac turpis.

Nunc id cursus metus aliquam eleifend mi in. In fermentum et sollicitudin ac orci. Enim neque volutpat ac tincidunt vitae semper quis lectus nulla. Lacus luctus accumsan tortor posuere. Ac auctor augue mauris augue neque gravida in fermentum. Risus quis varius quam quisque id diam. Ac turpis egestas maecenas pharetra. Luctus venenatis lectus.

This material is for informational purposes only. No information contained in this material may be reproduced or copied in any format without the express permission of People 2.0.

©2019 People 2.0



CASE STUDY people2.0

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Fringilla urna porttitor rhoncus dolor purus non enim. Turpis egestas sed tempus urna et pharetra massa. Dictum non consectetur a erat nam at lectus urna duis. Faucibus pulvinar elementum integer enim neque. Pretium viverra suspendisse potenti nullam ac tortor vitae purus. Aliquam etiam erat velit scelerisque in dictum non consectetur a. Et malesuada fames ac turpis.

THE RESULTS

Nunc id cursus metus aliquam eleifend mi in. In fermentum et sollicitudin ac orci. Enim neque volutpat ac tincidunt vitae semper quis lectus nulla. Lacus luctus accumsan tortor posuere. Ac auctor augue mauris augue neque gravida in fermentum. Risus quis varius quam quisque id diam. Ac turpis egestas maecenas pharetra. Luctus venenatis lectus magna fringilla urna. Quisque sagittis purus sit amet volutpat consequat mauris nunc congue.

Ut porttitor leo a diam sollicitudin tempor id eu. Purus faucibus ornare suspendisse sed nisi. Ultricies lacus sed turpis tincidunt id aliquet risus feugiat. Consequat interdum varius sit amet. Vitae auctor eu augue ut lectus arcu bibendum. Libero justo laoreet sit amet. Adipiscing bibendum est ultricies integer quis auctor elit sed. Lacus sed viverra tellus in hac. Cras adipiscing enim eu turpis egestas pretium. Magna sit amet purus gravida quis blandit turpis cursus. Sit amet consectetur adipiscing elit ut.

ABOUT PEOPLE 2.0

Founded in 2001, People 2.0 is a preferred back-office services provider for leading staffing firms, recruiters, managed service providers, compliance companies, and consultants. We serve as an employer of record (EOR) for global contingent workforces—taking on your placements as People 2.0 employees to ensure IC compliance and timely payroll. We serve and support clients in all US states, Canada, and 60+ other countries from our headquarters in suburban Philadelphia, Pennsylvania, and our offices in Houston, Texas, and Brampton, Ontario.

Our Back-Office Services

How would you like to get your time back, improve compliance, and grow your business by outsourcing critical back-office services? Our service offerings can help:

- Employer-of-record (EOR) payroll services, including payroll, sales, and tax reporting
- Unlimited payroll funding
- Invoicing, accounts receivable, and collections management
- Indemnification for independent contractor (IC) classification
- Workers' compensation insurance and risk management
- Competitive benefit solutions for the contingent workforce
- And more

Learn more about how People 2.0 can help you grow:
call 800-270-3579 or visit www.people20.com

This material is for informational purposes only. No information contained in this material may be reproduced or copied in any format without the express permission of People 2.0.

©2019 People 2.0

In addition to having the three defined sections, you can see that there is a "highlights" section to draw attention to what's most important in the case study. Further, it's helpful to have an "about us" section and a call-to-action somewhere on your case study that doesn't distract from the story you're telling (usually at the end or bottom of the page).

- **Infographics.** Did you know that in the past five years alone, searches for information graphics (infographics) have increased by 25 times? With graphics becoming a preferred way to take in new content, infographics can serve as a creative, effective way to deliver you client success stories. While they still typically follow the challenge-solution-results formula, these can be incredibly effective when highlighting a relationship with a long-time client (for example, creating a roadmap that highlights the pivotal challenges and successes over the years).

How to Go About Writing a Case Study

Now that you're familiar with the different ways to appeal to your audiences, the various formats, and the best ways to structure your content, you're just about ready to start writing! But before delving into the process of crafting a case study, it's crucial to note the difference between proactive and reactive writing situations.

In a proactive writing situation, you're the one driving the story-telling, content, and timelines; whereas in a reactive situation, a client is asking for case studies with their own, established parameters (e.g. length, certain challenge scenarios, clients of similar size/industry, etc.).

When creating your own case-study processes, it's necessary to consider these different scenarios and alter your strategy accordingly. Often times, you will find that if you have enough pre-established content created, you can use some of it when writing client-specified case studies.

Steps to Writing an Effective Case Study

1. **Evaluate what clients are really asking or care about, OR identify content gaps & highlight an incredible success your company achieved.**

   Going back to the idea of proactive vs. reactive situations, your starting point will vary based on your purpose. If you're writing a case study for a specific client, reading the prompt/question they provide can offer you more insight into what their challenges actually are. Further, if the request for a success story is a part of a larger RFP process, make sure you review those materials to gain more insight.

   For proactive, case study instances, it helps to see what topics, client industries, etc., you don't have a lot of, and go from there. Or, if your company had a recent, notable success with a client, you'll want to make sure you highlight it.

2. **Come up with applicable questions.**

   Once you have the topic/client you want to spotlight, it's important to come up with a set of questions to help you find out more details, and write a stronger narrative (if not already provided by a prospect). Also, framing your questions in the challenge-solution-results formula can ensure you ask all the questions you need, and keep you organized for when you write your first draft. Examples of some questions you could ask include:

- Why did our client decide to engage with us? Did they have any unique challenges?
- What specific solution did we provide them to solve their challenges? Was there anything innovative we included?
- Were we able to deliver any measurable results for the client? What is the current state of our relationship with the client? Do we plan on expanding services in the foreseeable future?

3. **Engage the appropriate stakeholders.**

   After you've created a list of appropriate questions, you can start engaging the appropriate, internal stakeholders. Use your questions to guide your conversation until you have a full understanding of the client's situation and what your organization did to solve their problems.

   If you're looking to include your client during the info-gathering process, make sure to reframe your questions so that it accounts for their point of view (e.g. what unique challenges were you facing when you engaged us? How do you feel about the solution we were able to provide? Did we provide the results you expected?).

If you want to name your client outright in a case study, make sure you go through the appropriate channels to ask their permission and have them approve whatever content you're posting.

If a client has expressed they do not want to be named, you can always refer to them by industry (e.g. an automotive client), and provide other identifying factors that don't fully give away their identity.

4. **Write copy based on conversation(s).**

   Now that you have the full scope of the situation, you're ready to start writing! As you're working through each section, remember to call back to the rhetorical appeals. Ask yourself:

   - Have I established where my company's expertise has helped our client through their challenges? (ethos)
   - Have I included concrete examples of our solution and measurable results? (logos)
   - Are these challenges and solutions positioned in a way that will resonate with readers? (pathos)

5. **Review the copy with stakeholders for approval.**

   Once the copy is in a good place, go back to each of your stakeholders to make sure you've appropriately conveyed everything and that nothing is missing. Additionally, go through and double check for any spelling/grammar issues, explain any acronyms, and clear up any confusing passages.

6. **Put into layout.**

   After the copy is approved and ready to go, now is the time to put it in the proper layout. For reactive case studies, they might require you to put everything in a word or excel document. Make sure to review their parameters and include everything they ask before you submit.

   For proactive case studies, using a program like Adobe InDesign or Microsoft Publisher can help enhance any visuals, and make it compatible for printing. Make sure to save these as PDFs for a more finished look, and to avoid unwanted changes to content.

7. **Post and promote.**

   Finally, you're ready to publish! If you want to use your case study for lead generation, make sure to create a landing page with a form and short description of what the reader can expect. To promote your new success story, put a blurb on your homepage and post on appropriate social media sites, like LinkedIn.

Once you've developed a process for writing your case studies, don't forget to find a way to best organize and access them. Whether it's saving them on your company's shared drive or using a cloud-based program, keep them all in one place so you can easily find them when you need them.

Conclusion

Now that you know the ins and outs of creating an effective success story, you can start tailoring a case-study process that works best for your organization! What's more, while written/print case studies have been the long-time standard, some companies are putting a larger focus on user experience, and using innovative technologies to tell their customer success stories. With video testimonials and interactive-format technologies becoming more prominent, there is great potential for evolving the ways we approach conveying and writing success stories.

Ultimately, regardless of approach, you still need to make sure you're telling a compelling story that not only best highlights what you do every day for your customers, but one that acknowledges who it's actually talking to. At the end of the day, your readers/customers are people—and one of the pivotal ways we connect is through story-telling and shared experiences. If you can capture them there, you've likely already sold them on your business.

A Partner You Can Trust

As a part of our comprehensive back-office and employer of record (EOR) solution, People 2.0 provides expert-driven advice and support for all things staffing- and recruiting-related. Whether you're seeking guidance on recruiting strategies, looking to expand your business development capabilities, or ensuring proper compliance while offloading your non-core business tasks, People 2.0 serves as a strategic resource in helping you efficiently and profitably place talent!

Learn more about how you can strengthen your sales strategy and place contractors globally and compliantly

call 888-270-3579 or visit www.people20.com

people2.0®

GLOBAL WORKFORCE DEPLOYMENT