

Case Study Checklist: How to Produce a Quality Marketing Case Study Every Time

Consistency is important in your marketing communications and your workflow. This case study checklist will help ensure you've literally checked all the boxes en route to producing a great case study.

For more details on the sections in this checklist, [refer to this post](#).

1. Strategy: Strategize before you Editorialize

Before you do anything, make sure you have a solid strategy for your case study by answering these key questions:

- What's your goal with the case study?
- What type of prospect are you targeting?
- How will you use the case study?
- Who owns the relationship with the client on your team?
- What should you know about the client before proceeding?

2. Selection: Choosing your top case study prospects

Once you've got the big picture strategy aligned, now it's time to narrow your client list even further, based on the following criteria:

- Identify client(s) that is ready, willing, and able to say positive things about you. (List here)
- Find recent work that you've conducted that's worthy of sharing.
- Choose client and work that is relevant to your goal.

3. Pitch: Making the case to clients

Now it's time to reach out to the client.

- Create an email or phone script, which should include the following attributes:
 - Answer what's in it for them.
 - Keep it short.
 - Explain why you want to do this now.
 - Give a deadline.
 - Thank them for their participation in advance.
- Make contact with client.
- Confirm either Yes or No.

4. Create a formalized “pitch package.”

This is a more formal document that can be shared with other members of the company describing the parameters of the case study. Create a document that:

- Summarizes the points in the pitch from above.
- Reassures them it won't take a lot of time and that they have the final say for approving material.
- Explains the interview process.
- Makes it as easy as possible for them to schedule a time through something like a Calendly link.
- Provide samples of previous case studies or find ones on Internet that you will emulate.

5. Scheduling and conducting the interview

Now it's time to reach out to the client and conduct the interview. It's essential you speak directly with the client to capture their words.

- Document your step-by-step process for the interview (if different from this checklist).
- Schedule a phone or Zoom interview (1-2 people maximum).
- Use a recording device to record the interview.
- Review client's background, company and the particular way you helped them.
- Create a list of questions for them to review.
 - Ask questions about experience.
 - Ask questions about impact.
- Send questions to them a week before the interview.
- Ask for graphics, videos to help tell the story.
- Ask for stories or personal anecdotes to add.

6. Writing the case study

Integrate these key case study elements as you create your content.

- Choose a format for your company. "Challenge-Solution-Results" is solid, but don't feel the need to be restricted to those words.
- Write 5-30 different headlines - choose the best.
- Include numerics or goals achieved in the headline.
- Explain who you helped and what you did in headline but save how for the case study.
- Use charts and graphics to tell the story.
- Limit the company details for your client -- feature in a sidebar.
- Showcase your own people.
- Craft a specific call to action.

7. Boost your readability - Use proven methods that work for large bodies of content

We've listed a number of tried-and-true tactics we use with any type of writing. They definitely apply to case studies.

- Keep length to 2-5 pages.
- Use paragraphs only 1-3 lines in length (when possible).
- Use subheads (H2, H3, H4).
- Use paragraph subheads to break up the writing.
- Use visuals for every page scroll.
- Use bullets, numbered lists.
- Use parallel form on bullet headers.
- Make the writing lively.
- Let the article sit overnight, then review and cut your word count by 10%.
- Integrate video and audio where possible.

8. Distribution: Getting the word out

After all that time and effort, you want to maximize the case study's exposure. How? By leveraging the power of repurposing. Case studies can be used throughout the sales funnel.

Top of funnel

- Take the interview transcript, clean it up and edit, get it approved by the client, and, presto, you have a great Q&A blog post.
- Use it in your email subject-line.
- Print it out for trade show handouts.
- Post it to social media feeds.
- Grab attention with Facebook and LinkedIn ads, then set a retargeting ad based on views of the page.
- Include a downloadable case study with your CTA.
- Use testimonial quotes on your landing pages or website pages.
- Use in email outreach and put quotes or stats in subject lines.
- Make a Slideshare presentation out of it.
- Use the case study itself as a lead magnet: How we solved this problem for this kind of company.

Middle of funnel

- Send along with your RFPs.
- Share in pitch meetings.
- Equip your sales team with them.
- Add to newsletters.
- Drip the story with an email series.
- Create handout that can be included with capabilities brochure and at pitch meetings.

Bottom of funnel

- Place case study stats or quotes next to friction points like pricing areas or landing pages (see below).
- For upselling options, have a case study available that demonstrates how a client benefitted from your premium package.
- Use on sidebar of landing page.

Create top-of-funnel “case studies” for other people

Write a profile story about an expert or partner’s solution and highlight them as an expert source.

- Interview expert and write a post.
- Make it more of a general article and use keywords in the headline to rank.
- Share it on your social media and ask expert to link back to your page.
- Produce a PDF document of the article for them to use with their clients.

Notes

Re-use this Case Study checklist every time to ensure you’re consistent!

As creative beasts, we have a tendency to want to recreate the wheel with each piece of content.

That’s fine, but save the creativity for the prose, not for the process. Follow this checklist to ensure you produce quality case studies, time after time.

For more information:

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