

39-point checklist for creating a customer story that converts

Getting started

1. Choose a story that addresses a product or market your company wants to focus on.
2. Choose a story that addresses the customer persona you want to focus on.
3. Make sure you have written approval from your customer before you start writing.
4. Make sure your interviewee has (technical) knowledge about the project.
5. Make sure your interviewee has speaking authority.
6. Check your story idea with your sales team first.

Conducting the interview

7. Research the product and/or customer thoroughly beforehand.
8. Prepare a solid questionnaire beforehand.
9. Don't be afraid to deviate from the questionnaire when your interviewee is open to discuss something unexpected.
10. If possible, use a voice recorder during the interview. This way, you have your hands free and don't need to concentrate on writing the answers down.
11. Avoid yes/no questions. Ask open ended questions (what, how, why) instead.
12. Ask the customer to quantify the results.
13. Ask for results that are SMART: specific, measurable, achievable, realistic, timely.
14. If the customer cannot talk about results yet, then ask about the *expected* results.
15. Ask 'dumb' questions.
16. Use this magical last question: *Is there anything else we need to know about?*
17. Don't do the interview if you sold the solution yourself. Let someone else do it.
Interviewees will be more relaxed and candid when you are not there.
18. Combine multiple interviewees for different angles.
19. If you need a specific quote, just ask: *"I would love to have a quote on this feature. What would you like to comment on that?"*

Writing & designing your story

20. Find an interesting hook to start your story.
21. Use the *challenge – solution – results* sequence as your guiding framework.
22. Use an attention-grabbing title: check online news feeds for inspiration.
23. Use titles and subtitles to improve readability.
24. Use pull-out quotes to attract attention.
25. Show a head shot of the interviewee.
26. If you make a printed version of your customer story, design your document in a two or three column structure. This improves readability.
27. Use images with captions: these get scanned first by readers and give a quick glance at the story.
28. Write simple language and short sentences. Avoid jargon if possible.

Handling customer approval

29. Try to limit revision rounds as much as possible. Make sure you have internal approval first before reaching out to the customer.
30. Write your story as soon after the interview as possible. The shorter the time between the interview and the request for approval, the bigger the chance of getting approval.
31. Document your customer approval.
32. Write a thank you note afterwards.

Promoting your story

33. Post your success story on social media.
34. Add the story to your blog and newsletter.
35. Add the story with project offers.
36. Use short testimonials pulled out from your customer story and spread them across your website.
37. Pitch your customer story to the trade press. You might need to tone down the commercial language and make your story more objective.
38. Make summary slides for the presentations of your sales team

Get help

39. Need some professional help in creating success stories? Then drop me an email at kristof@maddelein.com or check my website www.maddelein.com for more tips and tricks.