

A proven process for writing  
convincing case studies without  
stressing out

Why are not all B2B copywriters offering case studies already?

You think it's easy, until you do it yourself.



## Top 4 frustrations for case study marketers:

- The customer does not want to cooperate in your case study.
- The review process took ages and in the end the customer didn't **approve** the story.
- The interview with the customer felt awkward, and I didn't get the information I wanted from the interview.
- The story is not very inviting to read, and it's not clear what the story is about anyway.

You need a process.

My proven formula for  
completing case study projects  
from a to z without stressing out

# The BRICS framework



B

## Briefing

Get the story basics from your customer before going into the interview.

## B

## Briefing

- Why do we want this story in the first place?
- What is the product, solution or capability that we want to highlight?
- What company is the case study talking about?
- What is the product or service that has been sold?
- Who can you contact for an interview or for more information?



## Briefing

If you need to interview someone:

- Does the interviewee **know** anything about the project?
- Is the interviewee **authorized** to talk on behalf of the company?

**B**

Briefing

**Get your information from someone  
who is as close to the end customer as possible.**



Research

Research the hell out of your case study.



## Research

- Make sure you have all the info you need before going into the interview.
- Fill in the missing pieces where possible.
- But don't make assumptions.
- Make sure you make a good impression with your interviewee.



## Research

Build your questionnaire.

Make sure it covers all you need to know.

- **BEFORE:** What was the situation before the end customer bought the solution?
- **DURING:** What made the customer decide to buy this solution?
- **AFTER:** What incredible results did the customer achieve with this solution?



## Interview

Probably the most dreaded part of case study writing.





## Interview

# The most dreaded part of case study writing



- The most essential part of the case study writing process.
- The interview will make or break your case study.
- Your case study will only be as good as the questions you ask.



## Interview

# A customer interview is not a journalistic interview

- Think of it as a conversation.
- You need to make both the seller and the buyer look good.
- However: we can use journalistic techniques to run our interview.



## Creation

Your case study will talk about how the customer...

- experiences a serious problem.
- tries to find a suitable solution, but fails.
- starts looking for a new approach.
- implements a new solution.
- solves the problem and achieves great results.



## Creation

### Building blocks: overview

- Headline
- The customer
- The challenge
- The journey
- The discovery
- The solution & implementation
- The results

S

Sign-off





## Sign-off

- Go for **internal review** first, then send it to the customer.
- To avoid endless revision rounds, make sure your case study is **as close to final as possible**.
- Make it as easy as possible for the customer to finalize the document.
- Ask approval **as quickly as possible** after the interview.
- If you feel that the approval process is dragging on, then ask your sales or account manager to jump in and contact the end client.

Managing this process well  
=  
Your ticket to case study writing success

- B** Briefing
- R** Research
- I** Interview
- C** Creation
- S** Sign-off