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All Case Studies Are Not Created Equal

Ten tips for improving your customer stories

Case studies are a ubiquitous part of many marcom mixes. But not all case studies are equally effective. Here are 10 tips that will help you make more of your company case studies.

1. Do your homework

It seems obvious, but lack of planning torpedoes case studies. In particular, you need to:

- Gather background on the customer company and specifics on the problems and solutions. Prepare your questions. (Most companies already do this).
- Figure out where in your marcom mix to use the case study. This impacts who you take with you—photographers, film crew, director and makes sure you don't waste time and effort.
- Figure out how you'll use the case studies. Can the customer speak to your service, fear of change in your industry, your products, broken processes, restored processes, some other specific area? Knowing what you want to get out of the case study will allow you to ask the right questions. "Tell me your story" is likely to elicit a general answer. "Tell me how [company] service impacted your migration makes a richer, more useful case. Can your sales reps add context to the situation? Ensure you interview them too.

2. Assemble a complete team and brief them well

Based on your homework, you'll know who needs to be at a case interview (see tip 1). That way you won't have to return—irritating your client—because, for example, you forgot the photographer. Make sure you've choreographed the interview, so video and photography teams aren't tripping over each other. And that you have all the photos and footage you need (including b-roll footage to fill out the story). You can even do simple storyboards to ensure everyone's clear on the plan and timeline.

3. Send in an advance person

The hour or two that an advanced person spends at the client site can be invaluable. He/she can help put the interview subjects at ease, scout for video and photo sites, get necessary permissions and make any last-minute revision to the timeline.

4. Send question areas (not questions) ahead of time

Nervous interviewees (which are nearly all interviewees) will try to memorize the answers to the questions you send. This can lead to canned, strained (as they try to remember what to say), less-than-authentic answers. Good case studies build a bridge between the interview subject and the audience. Canned answers destroy trust. Send question areas rather than a list of questions and you'll likely get more authentic answers. The advanced person can do a practice interview(s), as well, to put the subject(s) at ease.

5. **Manage the case study subject's expectations**
   Complete case studies (especially video shoots that cover multiple locations) take a lot of time. Most companies are ok with this when they have a realistic understanding of the time commitment. The company should know how many people you need for interviews, any b-footage required, and how long you'll need their people on hand.

6. **Focus on the interview company and not your own**
   Please, please do this. Having a customer spout testimonial statements may make you feel great in the moment, but your audience rarely find hype-y statements convincing. When you hone in on the processes your company was involved in changing—the before situation in particular—you're more likely to grab the audience's attention. People respond to honest stories. And they see themselves in the "before" situation if they're considering your product or service, so focus there.

   ***Note:** you may have to "coach" interview subjects not to gush about your company. If they've agreed to be a case study, they're probably pleased with you. Explain that you're more interested in their stories than testimonial statements. Both they and the audience will be grateful.*

7. **Keep the answers short and to the point**
   The shorter the answers, the more flexibility you'll have in using them. Word your questions so they invite short answers. You can get more detail with each follow-up question. When interview subjects tell long stories or get off point, stop and start over. Also, have the interview subject pause at the end of each answer so you'll have room to cut between answers.

8. **Incorporate the question in the answer**
   In most cases, the audiences won't hear the interviewer's questions. So, the question has to be stated or at least implied in the answer. (Unheard) question: What was the biggest frustration you faced during the installation? Unusable answer: "the down time for my staff." Usable answer: "Our company's greatest frustration during the installation was the down time for my staff."

9. **Never make the interview subject feel rushed**
   Everyone on the case study collection team must project the attitude "tape is cheap, you're (the interviewee) doing great, and we have all the time in the world." If interview subjects feel rushed during an interview, they probably won't be able to get through a take. Always schedule more time than you think necessary for an interview. An interview subject worried about making a meeting will give a bad interview. Take a break whenever the interview subject needs one. Tell the interviewees that they have control over the take. If they don't like their answers, they can redo them.

10. **Give the case study company complete control**

Go over the case study approval process ahead of time. The case company should always know in exactly which context(s) statements will be used. Establish this, in general, before the shoot, and follow up with appropriate review of all materials.

Above all, have fun. Expect things to go wrong because they probably will. Keep your head and your sense of humor when they do. This makes the experience more pleasant for everyone. More importantly, it leads to great results.

Also leave room for serendipity. One of my best interviews ever came when I was chatting with a company owner while we were shooting b-roll footage. He mentioned something I hadn't known to ask. We flipped the camera around and had him repeat his observation. Spontaneous case study gold.

About Us: xtraBrandwidth has coordinated, conducted, and implemented scores of case studies across the United States, Canada, and Europe. With more than 25 years of marcom experience, xtraBrandwidth has helped technical companies—automotive, aerospace, lighting, printing, med tech and more—improve brand recognition, attract and retain customers, and sell more. Learn more at www.xtraBrandwidth.com