

# YOUR ESSENTIAL CASE STUDY QUESTIONS

## How to set the context with challenges and goals

Setting the context starts with describing the situation before you came into your customers life and describing the needs and goals that your customer hoped would be achieved.

Questions to ask:

1. What specific challenge were you looking to solve *or* what goal were you trying to achieve?
2. [If a challenge] What could have happened if you hadn't resolved this challenge?
3. Had you already tried other solutions that didn't work? If so, what happened?
4. Which of the following objectives would you say solving this challenge OR achieving this goal would support?
  - a. Complying with government regulation
  - b. Lowering business costs
  - c. Becoming profitable
  - d. Generating more leads
  - e. Closing on more customers
  - f. Generating more revenue
  - g. Expanding into a new market
  - h. Becoming more sustainable or energy-efficient
  - i. Other (please detail)

## How and why you won the business

People are always interested in the process that delivered a strong partnership, they want to know how and why they can replicate it for themselves. Questions to ask:

1. How did you hear about/know of our company/brand?
2. Can you describe what made our brand stand out from its competitors?
3. Who was involved in the decision making and where are they based?
4. Can you tell us more about the decision-making process you went through?
5. What were the most important factors when considering potential options?

## How to showcase the success of your project or partnership

The purpose of a case study should be to clearly describe what has changed and what is better after a project has been completed or activated. Questions to ask:

1. How long did it take to get the solution/support up and running?
2. Did the timescale meet your expectations?
3. Who was involved in that process and where are they based?
4. How has your business benefited from working with us?
5. Is there a particular benefit of working with our brand that you rely on/value the most?
6. How is the relationship helping you increase productivity/efficiency and/or save time/money?
7. How does this give you more competitive edge?
8. Looking forward, what are your plans for the future and how might these involve continued collaboration with us?
9. Can you give an example of a particular issue that we/our brand has helped you overcome and explain how?

## **How to develop a meaningful testimonial**

A meaningful testimonial is one that says something other than 'we think they are great' which tells no one anything that they can learn from. A case study should educate, influence, and persuade. The testimonial should be designed to deliver the persuasion. Questions to ask:

1. Are you happy to provide a testimonial about your work with us/our brand?
2. Who would be best placed to draft this?
3. When might we expect it?