Making Your Customer Success Stories Work for You

A Roadmap for Marketing and PR Managers

Compelling | Cases

the case study specialists

©2005, Compelling Cases Inc.; all rights reserved | www.compelling-cases.com | 505-473-3145

Contents

©2005, Compelling Cases Inc.; all rights reserved

Plan Strategically – and Sales Reps Will Thank You

Do your sales reps have the case studies they need to open doors and close sales? Is your PR team armed with the customer stories to land your company in key trade publications?

Consider the markets, size of companies and products—as well as specific functionality—you'll feature in your cases.

When companies first start out, having a few customer case studies—on any happy customers—is essential. But more established companies, especially those targeting multiple industries and offering a variety of solutions, should approach case studies more strategically.

Your organization has specific marketing objectives and target markets. You spend a lot of time identifying and planning around those objectives. As with any marketing communications medium, case studies should be approached strategically to ensure that they complement your overall marketing plans.

As you plan your annual budgets and goals each year, consider your specific needs. Do a full inventory of the cases you have already, and poll sales reps about what types of stories they need most to do their jobs effectively. Then, design a case study plan that takes into consideration the markets, size of companies and products—as well as specific functionality—you'll feature in your cases.

With a plan in place, you can proactively look for the best customer candidates to pursue, as well as communicate the types of cases you need to sales reps, account managers, partners and customers.

This handbook serves to guide marketing and PR managers on how to approach case studies strategically. It guides you through mapping out your annual case study planning; covers ways to solicit stories from employees, partners and customers; and addresses how to get cases approved; how to work with customers in the process; and various ways to use cases in your marketing, sales and PR efforts. The right mix of powerful customer stories, told in an engaging way and used throughout the sales process, will help your company build key credibility with prospects, partners and investors.

©2005, Compelling Cases Inc.; all rights reserved

Choose Featured Customers Wisely

Truly effective customer case studies start with choosing the right customers to profile. If your company is just starting out, you may not have many options for your featured customers because you simply don't have enough customers yet. However, in this early stage, case studies are critical for establishing credibility for your company and products. Even one or two cases with some ROI details and a strong story on those first customers can be instrumental in helping you make a sale or convince an investor of your viability.

Truly effective customer case studies start with choosing the right customers to profile.

As you add more customers, it's time to take a strategic tack. During annual budget planning, consider which case studies you'll need for the following year in order to serve all your key audiences.

Consider these important factors when weighing whether a customer would make an effective case study:

Audience

At times, featuring customers with a recognizable name will carry the most weight with your audience. If an established, well-known company successfully uses your products or services, a case study featuring their experience offers significant credibility.

Big-name case studies may play well with all your audiences. However, if you market to small or mid-market companies, it might be more valuable—and prudent—to show how an organization that's their size, with similar challenges, used your products or services to address their needs. You know your audience best. But don't risk scaring off your target market. If they believe your solution is targeted for other types of organizations, they may not see it as right for them.

Primary and Vertical Markets

What markets does your company target—retail, manufacturing, education, government, etc.? Just about any prospect you target is very narrowly focused on the specific needs and challenges within their organization and industry.

When planning your case studies, consider all your target markets. For example, retail business prospects want to see how your solution was a success in another retail environment. The same goes for all your key markets.

©2005, Compelling Cases Inc.; all rights reserved

Products and Functionality

If your company offers more than one product, you'll need case studies for every product that you're actively marketing. However, many companies choose to take that a step further and develop cases that focus in on the use of specific features or add-on products. This gives your sales reps the opportunity to showcase how specific add-ons or features bring value and up-sell those specifically. Otherwise, those benefits can get lost in a broader case study.

©2005, Compelling Cases Inc.; all rights reserved

Map Out an Annual Plan

Taking into consideration your marketing objectives and budgets, create an annual case study plan. Map out how many case studies you need to target your various markets, industries, products, features and capabilities.

Mapping out a specific plan helps ensure that your cases match your marketing needs and objectives.

Also look at how many stories you'll need to meet other marketing objectives. If you publish a regular newsletter for customers and/or prospects, and feature a customer story each time, you'll need at least one fresh customer case study for each publication, whether monthly or quarterly. Or, if you hope to place five features in trade pubs this year, ensure that you target the stories that will be most attractive to your top media.

The example below shows what a case study map might look like for a single product or solution. Having a specific plan helps ensure that your cases match your marketing needs and objectives.

Example Product – Small to mid-market solution

	Small business	Mid-market	Enterprise level
Retail	2	2	
Manufacturing	1	2	
Services		1	
Technology	2	2	
Nonprofit	2	2	
Education			
Government	1		
Health Care	2	2	

Evaluate case study leads against your annual plan to ensure you stay on track.

©2005, Compelling Cases Inc.; all rights reserved

Communicate Your "Wish List" to Employees, Partners and Customers

With an annual case study plan, engage employees, partners and customers to help you find the best candidates. Employees and partners regularly hear powerful stories about how your company effectively met customers' needs. But most often these stories get lost in the day-to-day shuffle, never making it to marketing and PR folks in a position to help communicate them to your outside audiences.

Establish ways for employees, partners and customers to share story ideas easily with marketing and PR staff.

Establish ways for employees, partners and customers to share these story ideas easily with marketing and PR staff:

- Remind employees employees every month in your internal newsletter that you're always looking for story ideas.
- Give customer-facing employees tips on what makes a great success story so they immediately recognize it when they hear it.
- Let customers know in external newsletters that you want to know about— and publicize—their successes.
- Offer incentives to employees and partners that submit hot tips that you end up using in marketing communications.
- Start a formal reference program, whereby satisfied customers become references whom prospective customers can call. Then, you always have an internal source of names for satisfied customers.

©2005, Compelling Cases Inc.; all rights reserved

Pre-Qualify Case Study Candidates

With names in hand, it's essential to pre-qualify all case study candidates. By doing so, you not only ensure that the stories you pursue fit with your marketing plans, but you will increase your chances that case studies, once started, will actually be completed.

Conduct a short initial interview with the customer to find out if their story meets your needs.

When you learn about a customer from a sales or account rep, partner, or the customer itself, do a short initial interview with the customer to find out if their story meets your needs. Create a brief questionnaire that you could go over with the customer by phone for about 10 minutes. Depending on your marketing objectives, the content you're after might vary. Maybe you're trying to emphasize how your consulting services team performed a smooth implementation of your product on time and on budget. Or, maybe ROI metrics is the most important factor.

Interview Candidates

Run through a set of questions with all case study candidates to assess whether they are good case study material. Depending on your marketing objectives, your questions will vary. However, here are some general considerations:

- What product, add-ons and features are you currently using?
- What size is your company (employees, annual revenue, locations)?
- What industry are you in?
- How many people use the solution?
- How long has your organization used the product or service?
- Briefly describe some of the challenges or problems that led you to bring in the new solution.
- Briefly, what benefits have you seen with the solution?
- Can you quantify a return on investment (ROI)?
- Have you secured your company's permission to be featured in a case study?
- If not, whom do we need to speak with to secure permission?
- What is the approval process at your organization (i.e. who must review and approve)?
- Who is the best person(s) to interview for the case study?

©2005, Compelling Cases Inc.; all rights reserved

Explain the Process

While some of your customers are familiar with customer case studies and how they are used, others are not. Explain to candidates what a case study is ("a two-page testimonial featuring the benefits the customer has experience with the solution") and how it will be used ("in marketing, sales and PR, in print and on the Web site…"). Perhaps even send candidates links to case studies on your Web site or PDF samples so they see what the stories cover.

Also, give them insight into your case study process. Let them know who will be contacting them to schedule an interview, how long the interview will take, when they would expect to receive the draft for review. If you have a legal release form and a written set of interview questions, send both so that the customer can review them before you start the process. This helps avoid any surprises later on.

By pre-qualifying candidates, you ensure that the cases you pursue match your annual case study plan and your marketing objectives, and have a better chance of getting approved in the end.

©2005, Compelling Cases Inc.; all rights reserved

Secure Permission Upfront – then Approval Later On

Unfortunately, the most important part of the case study process can be the most unpredictable—your customer's approval. Sometimes approval can be elusive no matter how diligent you are. Your key contact can change jobs, your customer can be acquired, or any number of unforeseen things can crop up to stall or thwart approval.

A few steps throughout the process will help increase the odds that your case studies are approved for use.

However, there are ways to make the process go more smoothly. The following steps can help increase the odds that your case studies are ultimately approved:

The "Asker" Matters

When approaching a customer about participating in a case study, it's best to choose someone with an established relationship with that customer, like a sales or account rep. If the customer knows the person asking, he or she will be more likely to agree and have a sense that they're doing this for a friend or associate. This relationship can make a difference both during initial buy-in, and later when it's time to push it through approval.

Likewise, if a case study gets stalled in approval later on, a check-in from the asker can give it momentum toward approval.

Explain the Process – Before Starting

Give prospective featured customers all the details about what's involved in the process. Lay out how much time it will take (ideally, not more than 1-2 hours total), who will be contacting them to get started and how the case study will be used. Send samples of existing case studies and your legal release form, if you have one.

Then, turn the tables and ask customers about their approval process. Do they have any official policy against this that your contact may not be aware of? Find out who will be reviewing it in addition to your main contact – his or her department manager, marketing/PR or legal – and make sure they know all the facts as well.

It can be tough to do this due diligence upfront, but well worth it. You'll be less likely to encounter surprises later on.

Start ASAP

After landing your customer's permission, have the interviewer or writer call immediately to get started. That's when your customers are most likely to still be

©2005, Compelling Cases Inc.; all rights reserved

excited about your products and services, should still be in their current position, and will remember being asked.

Watch Your Legalese

Some companies choose to have customers sign a written legal release form, while others rely on an email stating approval. Whichever route you choose, just keep in mind: Complex legal release forms try everyone's patience and can often slow down approval of your case study. But many companies find them necessary. Keep yours short and simple and it will pass more easily through the approval process.

Dislodge Cases from Approval Limbo

At times case study drafts can get stuck somewhere in the approval process. If this happens, try going back to the person who initially approached the customer (the one who has an established relationship with him or her). Have that individual casually check in with the customer about the case study.

Also, send a thank-you gift or card, or have the account manager call to thank the customer, DURING the approval phase. This step that can dramatically increase your chances of getting the signoff you seek or speed up the process.

Check in Often

Check in with the customer often until you wrap up approval. Determine what's reasonable without pestering the customer. Every week? Every two weeks? Email or phone?

Respect Customers' Time and Wishes

Most importantly, stay gracious, appreciative and respectful of the customer's time at all stages of the process. Work with their schedules and honor their requests for edits. If you work with them, they'll be more likely to assist with moving the case through the process smoothly.

©2005, Compelling Cases Inc.; all rights reserved

Set Your Cases Up for Success

When approaching your case studies, a few additional considerations will help ensure that they meet your marketing and PR objectives.

Interview the Best Spokesperson(s)

Who is the decision-maker regarding your products or services—someone in IT, someone in an executive or business role, or both? The individuals you interview for your case studies should match the decision-maker or audience you are trying to reach.

The individuals interviewed for your case studies should match the decision-makers or audience you are trying to reach.

For example, an IT manager will connect with and respond more to what another IT manager has to say about the solution. However, always consider that executives or those in business roles might also read your cases, and answer some of their questions and considerations as well, such as return on investment and the business impacts. If your main interviewee can't speak to these issues, it might be best to do a second interview with someone who can and include quotes and information for both IT and business readers.

Match the "Tech-Speak" to Your Audience

Similarly, the level and type of detail you include in your cases should match your audience. If you've identified IT managers as the decision-makers on your product at prospective companies, then your case studies should include a fair amount of technical details. Those in IT roles will want to know specifics such as server and database needs, implementation time, integration with other applications, ease of administration, and ease of customizability.

For non-technical audiences, include basic technical specifications and provide layman's explanations on how the solution enhanced the company's business processes. Clearly call out ROI and how the product improved operations.

If you're addressing both types of decision makers, strike a balance—give the tech specs IT managers need, but keep the case study written clearly enough that anyone can understand it.

Ask the Right Questions

Your interview questions are another essential area for separating great case studies from so-so ones. Base them on what your prospects need and want to know, and how much detail they need.

©2005, Compelling Cases Inc.; all rights reserved

As you craft your questions, or support your case study writer in doing so, ask yourself the following questions:

- What are your key marketing messages?
- What do you offer/promise your customers in your other marketing materials?
- Do you work with specific industries?
- What are the features or modules about your product/service you most want to showcase?
- When you're talking to a prospective customer, what do they want to know about your product/service?
- What is usually the selling point to a customer?
- What technical specifications or details are relevant to prospective customers?
- Are there third-party add-ons or other modules you might want to mention?
- Do you want to mention resellers in case studies?
- Is it important to feature the selection process in your case studies, how the customer selected you and what other solutions they considered?
- Is it important to feature the implementation process or your company's consulting services?
- Is it important to feature training you provided?
- What benefits and success metrics are important to readers?
- Time-savings for the customer?
- Offers a solution they couldn't find elsewhere?
- Cost savings?
- Improves customer's efficiency?
- Improves customer's employee relations?
- Improves customer's organization?
- Improves customer's customer service?
- Improves customer's ability to make management/strategic decisions?
- Improves customer's image?
- Improves customer's sales?

©2005, Compelling Cases Inc.; all rights reserved

- Boosts customer's market share?
- Improves customer's retention?
- Helps customer do more with fewer staff?
- What would be the ideal compliment a customer could give you about your product/service?

By taking a conscientious approach to your case studies, the end result will better meet your marketing needs and objectives.

©2005, Compelling Cases Inc.; all rights reserved

Without Fail, Thank Your Customers

When a customer signs off on final approval of a case study, the process doesn't stop there. Establish a regular method of thanking customers for their time and willingness to share their story publicly.

Establish a regular method of thanking customers for their time and willingness to share their story publicly.

Here are some suggested steps for completing the loop with your case study customers:

- Mail a handwritten thank-you note from someone at your company who was involved in the case study project, either the sales or account rep who asked the customer originally or another individual who interfaced with the customer in the process.
- Have the customer's account manager or sales rep place a follow-up call thanking them personally.
- Send complementary company promotional items—a mug, pen, baseball cap, t-shirt—along with a thank-you card.
- Send some other type of gift items, such as gourmet food products, etc.
- When the case study is in its final layout, send the file or the link to view the story on your Web site. If printed, send the customer several copies. You'd be surprised how many end up framed and mounted on customers' walls.

You don't have to spend a lot to thank your customer. However you choose to thank them, the gesture will be very appreciated.

©2005, Compelling Cases Inc.; all rights reserved

Get the Most Mileage from Your Success Stories

Case studies, or customer success stories, have become an integral part of many companies' marketing and sales toolkits. However, most companies only use them in a couple of ways.

Beyond printing case studies for sales reps or publishing them on your Web site, there are a number of additional ways to extend the value of your case studies.

1: As a Powerful PR Tool

A number of companies use case studies first and foremost as a public relations tool. Before case studies are published on the Web site or distributed to sales reps, actively pitch them to the trade press as fresh stories. If it's an engaging, informative story, it might be picked up by several niche publications. In fact, many publications now have sections called "Case Studies" or "Technology in Action" specifically for this purpose—and they're looking for great stories. Likewise, companies out there are trolling these publications for real-world solutions to their business and technology problems.

There are a number of ways to extend the value of your case studies.

2: Wisely on Your Web Site

Sure, your Web site is the most obvious place for publishing your case studies, but it pays to put some thought into where and how you present them. Many companies feature case studies in a section by themselves, which separates them from the rest of product materials and forces prospects to hunt for them.

Instead of separating these stories, feature product-specific cases among other product information on your site. When a prospect visits the page for one of your products, they should be able to choose from a range of materials to review, such as brochures, white papers and case studies that highlight that product specifically. You can even go a step further in catering to prospects' need for information by allowing them to search by industry to find one that best matches their situation.

3: As Brief Anecdotes in Your Customer Newsletter

Many companies regularly distribute e-mail newsletters to alert their clients and prospects about new offerings, events and more. Show your solutions in action: reprint abbreviated versions of your case studies in your newsletters and link back to the full story online.

This educate customers and prospects about ways that others are using the software, perhaps introducing features, capabilities or add-ons they aren't yet aware of.

©2005, Compelling Cases Inc.; all rights reserved

4: To Punch Up PowerPoints

Instead of using case studies as leave-behind materials in the sales process, integrate them into your sales presentations. Create several PowerPoint slides with highlights from successful client implementations and e-mail them to your sales team. In the process of preparing presentations, they can simply insert these brief customer anecdotes to back up their product information.

5: As Ammo for Implementation Awards

Winning implementation awards can generate an enormous amount of exposure for a company. Customer success stories, whether in the form of case studies or retold to fit award criteria, are frequently used to land these awards. One CRM software vendor submitted a particularly compelling case study for Aberdeen Group's annual "Top Ten CRM Implementations" list. The company was honored as one of the top ten and then mentioned in at least a dozen follow-up stories in the media. That was priceless exposure for the company.

6: To Give Your Reference Customers a Break

Chances are, you rely on a handful of your best customers as references for prospective customers. But if called enough by inquisitive prospects, even the most satisfied customers can sour on your company. While person-to-person product discussions are always valuable, you can give your reference customers a break with case studies. Instead of contacting a customer directly, prospects can learn the specifics of an implementation, preferably in a similar industry, through a detailed success story.

If you plan to use case studies this way, it's important to make sure that your case studies offer the right amount of detail and cover the questions that prospects typically ask your reference customers.

7: Feature Quotes and Content in Sales Materials

As you write case studies, make sure that quotes within the case study could stand-alone if you chose to pull them as testimonials for other areas of your Web site or for use in collateral materials. Make use of the powerful testimonials that come out in developing case studies. Or feature shortened versions of your case study stories in brochures and other sales collateral.

8: As a CD Leave-Behind for Prospects

Put your case studies on CD with the ability to search them by product or industry. In face-to-face sales meetings and presentations, or in response to inquiries, provide prospects with the easily searchable CD. This approach puts the case

©2005, Compelling Cases Inc.; all rights reserved

studies right in the hands of your prospects, instead of asking them to go online for them.

9: As Live Case Studies

Invite your best, most dynamic case study customers to speak at your annual user conferences or as the featured guest in a Webinar. Such "live" case studies can be extremely powerful.

10: As White Paper Examples

If your white papers lend themselves to this type of information, leverage customer case study examples to show how specific organizations are using your product or service. This lends a more real-world element to your white papers.

You may find other valuable ways to use your case studies. When you have devoted the time and resources to creating a case study and have engaged your customers' time as well, be sure you use them as widely and creatively as possible to support your marketing goals.

©2005, Compelling Cases Inc.; all rights reserved

Conclusion

Case studies can truly enhance your sales, marketing and PR. However, their level of effectiveness and the return on investment you get from them depends on taking a strategic approach to planning, and a conscientious approach to working with customers and information-gathering.

Questions about Case Studies?

For other helpful articles and information about case studies, visit www.compelling-cases.com, write info@compelling-cases.com or call Casey Hibbard at 505-473-3145.

Compelling Cases Inc.
The Case Study Specialists
www.compelling-cases.com
505-473-3145

©2005, Compelling Cases Inc.; all rights reserved