

5

Golden Rules for Writing Better Customer Case Studies



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Customer case studies are essential to a successful, modern B2B marketing strategy. In fact, they're no longer assets that are just nice to have, they're now a business imperative because they provide the social proof — validation by someone other than your own company — that your products or solutions deliver what they promise.

Nearly 70% of marketers have used a customer case study or success story in their marketing program¹ because they're the most important type of late-stage buying cycle asset. More than 33% of B2B buyers say customer evidence from case studies is the most influential content in their buying decision and nearly 40% share customer case studies and success stories with the other members of their buying team².

But not all customer case studies and success stories are created equal. Failing to tell the best possible story in the best possible way is a terrible waste of time, money, and opportunity. So, here are 5 golden rules to follow for writing better, more valuable customer case studies and customer stories.

MORE THAN
33%

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GOLDEN RULE

1

It's not about you. Make the customer the star of the story

If you're tempted to write something like "our customer had this challenge, so here's the solution we gave them," STOP RIGHT THERE!

Customer case studies and success stories are not supposed to be sales materials. Prospects can already get that information from your website or other collateral. Instead, these assets should demonstrate the value of choosing your solutions or services over competitors, told from the perspective of your satisfied customers.

Focus your story on making your customer a hero who was smart enough to choose your company above all others to overcome a particular problem so that prospective customers reading the story can see themselves in that same situation... so they'll make the same decision.



¹ "11th Annual B2B Content Marketing Benchmarks, Budgets, and Trends Report." ContentMarketingInstitute.com. July, 2020.

² "Tirico, Klaudia. "2021 Content Preferences Survey Report." DemandGenReport.com. March, 2021.

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RULE**

2

Make it interesting with creative titles and headings

While virtually every customer case study will follow a Challenge/Solution/Benefit structure, using a bland title for the story and boring section headers is no way to make your story stand out from the thousands of others slapped on websites across the Internet.

Make readers want to read what you write with a creative story title like you'd find in a magazine article along with descriptive, helpful, and interesting section headers for each part of the case study. Replace Challenge, Solution, and Benefit with section headers that tease the most compelling part of a section's message, but leave enough to the imagination that the reader will actually want to see what it's all about.

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RULE**

3

Use a narrative style to emphasize the whole customer experience

Your prospects want to know more than just what your products or services can do. They want to know what it's like being your customer and why or how choosing your company over others will make their lives materially better.

Like a great movie, your customer case studies should tell the entire journey — from how life/the job was harder before you, and how your solutions uniquely address their specific needs, to what life is like today having your team as a partner in the customer's business.



Better yet, storytelling using a narrative style format is scientifically proven to reliably change the attitudes and intentions of readers³ — the exact purpose of writing a case study in the first place!

³ "Van Laer, Tom; et al. "The Extended Transportation-Imagery Model: A Meta-Analysis of the Antecedents and Consequences of Consumers' Narrative Transportation." Journal of Consumer Research. Oxford University Press, 2014.

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4

Use product marketing messaging subtly and strategically

Your customer case study should tell the entire customer story — including the role your products or services played in their success. But no one wants to read another product sales pitch.

Strategically and subtly incorporate your product marketing messaging into the story by explaining how your customer uses a solution or tool to accomplish a particular business goal, rather than simply telling a reader what the product does. Make sure to explain why the customer chose to use your solution a certain way and then tie business outcomes directly to specific tools or use cases in a straightforward, easy-to-understand way.

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5

Drive home critical points with customer quotes

Social proof points are far more compelling when they come directly from the source. While the rest of your story should give a reader the overview of the customer's journey, the specific pains your customer experienced each day as well as the successes they ultimately had using your products or services are better told in their own words.

Highlight specific business outcomes — cost savings, productivity improvements, or accelerated time-to-market — in customer quotes that combine the negative things they experienced before your company's products saved the day and the great successes they can directly attribute to your team after adopting your solutions into a single quote.

“Advocacy can propel a brand unlike any other paid or unpaid media because it unlocks the networking power of 1-to-1 relationships with a key of trust.”

– Rick Wion

Make sure the quotes stand out from the rest of your copy and that they can stand alone on their own without losing any context or value so you can use them independently on your website or in other marketing materials you might create later on.





Customer case studies and success stories are the go-to resource for prospective customers evaluating your business against your competitors.

Build credibility and trust with customer-centric, relatable storytelling

Customer case studies and success stories are the go-to resource for prospective customers evaluating your business against your competitors. Creating narrative-style customer case studies that walk readers through the entire customer experience will help readers see themselves in the story and wonder how your products and services can help them overcome their challenges the same way. Customer case studies aren't about your products. They're about your customer's unique and compelling experiences that set you apart from everyone else in your market.

SCOTT STRANSKY



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