White Paper

The “Case Study”: Developing, Repurposing and Leveraging for Maximum Reach and Impact

Introduction

According to a 2017 Forrester Research study, B2B marketing professionals find case studies to be the most valuable marketing tactic amongst all types of online marketing content.* However, either due to lack of time, know-how or commitment, most B2B companies fail to develop the type of quality content sales prospects are looking for when making important buying decisions.

Successfully leveraging a case study to increase the visibility of your marketing message relies on crafting a compelling story that other potential customers find interesting, effectively pitching that story to a variety of news outlets, and then distributing the content across multiple formats and channels to maximize its scope and impact. Although approaches may differ by industry, for technology providers, the following key considerations should be taken into account when devising your case study strategy.

** Source: Peer Stories and Credible Data Attract and Engage B2B Buyers, Forrester Research Inc.., 2017*

What problem does your product, service and/or solution solve?

When developing a case study, it is important both to correctly position your product or service within a broader context, and to describe the challenges the product/service is addressing for the specific customer in the case study. The latter can be significantly more difficult to do than the former, depending on the customer.

The news outlet you are pitching the story to will want to know why this particular customer deployed the solution – what problems were they trying to solve? These challenges can range from business expansion and meeting the requirements of a new contract, to addressing a fundamental operational flaw in their business or replacing a previously botched implementation. In some instances, the customer may be hesitant to share some of the details because they would cast the company in a poor light to their own customers or shareholders. Work closely with the client to massage the "problem/challenges" language so that they are comfortable with the information. You may be surprised how forthcoming some of your clients are when it comes to sharing these sometimes embarrassing details.

Product Differentiation

This ties directly into your broader marketing messaging – why did the customer choose YOUR product/service specifically to address these problems? Spell out why your product/solution is different than your competitors in concrete terms that the editor and their audience will understand. Bear in mind, the customer being profiled may not have selected your product based on the features/functions that are highlighted in your own marketing message.

When selecting clients for potential case studies, make sure that at least some of those selection criteria line up with your own messaging. In some cases, you may be able to glean new marketing insights from the client interview – your customers may be choosing your product for reasons that you hadn't initially envisioned.

Benefits and Tangible Results

Editors receive dozens, if not hundreds, of press releases and article pitches each month. In the case of the business press, the stories that are most likely to be picked up are those that include data on benefits and tangible results – how did the solution improve the clients' business and address the challenges previously outlined?

These benefits can be expressed in a number of ways: reduced costs, improved productivity/efficiency, increased revenue, reduced headcount or labor hours, etc. The client is likely using these types of metrics to measure how effective your solution was within their business (they may even be part of your contract), so the information usually exists. How comfortable your customers are when it comes to sharing that information can vary depending on the industry.

For example, reduced labor hours or headcount usually translates into layoffs in most organizations – not exactly a headline many companies would welcome. In those instances, it pays to be creative when describing the benefits the client realized.

The types of benefits data that is most appealing to editors falls into a few categories, and can be ranked in roughly descending order of interest:

Hard dollar savings/earnings: If the client has reduced costs (or increased revenue) with your product/solution, that information is likely to be part of the headline. If the product has addressed a common business problem, and generated real bottom-line financial benefits for the client, the chances of the case study being published increase tremendously.

Percentage improvements: If the client won't or can't share specific financial benefits, then percentages are the next best thing. These can include improvements in revenue, reductions in cost, improvements in efficiency, labor savings, and other metrics. In the case of smaller clients, where the specific dollar figure improvements may not be very large, these percentage-based metrics may actually do a better job of telling your story.

Descriptive improvements: In some cases, even percentage-based figures can't be shared. This may be because the client considers that information proprietary, or because they haven't yet been able to generate those metrics. In this event, try to describe the benefits as specifically as possible. For example, "reduced costs" is too broad; "reduced shipping costs" or "reduced costs associated with workman's compensation claims" is better. Describe specific tasks that were made more efficient or eliminated, new levels of visibility that were created, or new business opportunities that were generated because of the product/solution.

Don't despair if a client is unwilling to share specific benefit details. More high-profile customers may be less willing to share this data than smaller ones, but in those instances the name recognition of the customer will help sell the story to editors. If you've chosen a case study candidate that tells the story of your product/solution, or that tells an interesting story that other potential customers can easily identify with, those details can compensate for a lack of benefit data.

Include the Customer Voice

Customer testimonials add credibility and social proof for your product, service and/or solution. When developing a case study, interview relevant customer team members and include their names and quotes in the materials. If possible, try to go beyond the executive team leaders that are typically quoted in these stories – a few quotes from employees directly involved in the implementation, or that use the product/solution in their jobs everyday (an IT staff member, a shop floor employee, a supervisor, a store manager, technician, etc.) can add color to the story and help make it stand out from the glut of press releases/story pitches the editor is evaluating.

In addition, determine whether or not these executives/employees can be made available for interviews. Some news outlets may carry the case study you've put together as written; others will want to build from that material to create an original story with "live" quotes from the customer. If those interviews can be arranged, make that clear in the initial pitch, and make sure that the client has room in their schedule to participate in those interviews.

Finally, if the client is open to press interviews, determine ahead of time whether or not the client wants to review those stories prior to publication. Many news outlets don't submit articles for these types of reviews, so if the client insists upon this type of approval, the editor should know ahead of time. Most publications and website are working on tight deadlines; letting sources review their quotes prior to publication can add days or even weeks to the process. If you surprise an editor with a request for a client review while they are on deadline, they may be hesitant to accept future submissions from you.

Maximizing Reach and Impact: Repurposing Your Case Study

Once completed, your original case study can be used as a platform on which to build a wide variety of other communications materials. This expands the reach of your marketing message beyond the publications and websites that publish the case study and creates additional opportunities to partner with the profiled customer as they help further "evangelize" to the market about the value of your product/service/solution to other potential customers.

Typically, a case study story can be repurposed in a number of ways:

Press Releases: Draft a press release announcing the customer win and highlighting the customer benefits, which can be distributed through several different online newswire services. Even publications and websites that don't pick up the case study will likely utilize the press release.

Webinars: Invite the customer to participate in a short webinar that presents the highlights of the case study, engages the audience via live Q&A sessions, and serves as a platform to generate other customer leads.

Collateral Material: Utilize the case study as part of your sales information packet, highlighting key customer quotes and benefits.

Conference Presentations: Invite the profiled customer to present their story at relevant industry conferences. This is an opportunity for both you and your client to demonstrate industry leadership and value for your solution.

Online Videos: Conduct video interviews with case study subjects, and include footage of the product/solution in action at their facility. These types of short (two to ten minutes) videos can provide an easily consumable introduction to the case study and your marketing message, while also encouraging viewers to access or download the original case study.

Pitching Your Story to the Media

Before sending the case study to media outlets, research the publications and websites for each relevant vertical market. Identify the correct editor/staff member to receive the pitch (these positions change frequently) and tailor your pitch based on their specific editorial focus. For example, a case study about a major retailer utilizing a new technology could be presented with more of a focus on the customer (for a general retail industry magazine) or on the product/technology being used (for a more technology-centric outlet).

There are likely multiple potential media outlets within each vertical, and it is possible to negotiate exclusive terms with multiple publications/websites provided they do not overlap. As an example, for a case study about a manufacturing company using new mobile computers in a warehouse, you could negotiate exclusivity for a manufacturing publication, a warehouse/supply chain management publication, and a mobile computing publication. The publications receive unique content for their particular sector, while you still create multiple opportunities for the story to be seen by a variety of different audiences.

Be prepared to assist with coordinating phone, e-mail or in-person interviews with the customer and the various media outlets. Also make sure that you can provide multimedia (photos, videos, etc.) along with the written material. Both the customer and the editors you pitch the story to will be grateful for having imagery for the story without the additional hassle of trying to arrange for photography individually.

Share Your Story

Plan and implement a coordinated and integrated communications strategy that you can increase the reach and impact of the case study as it is picked up by various media outlets. In addition to the initial case study and companion press release, announce the story via customer e-mail or newsletter lists. Time additional coverage for social media accounts (LinkedIn, Twitter, etc.) as the story is published in different markets. Images and videos can also be shared over a period of weeks or months to extend coverage.

Measuring Success: Tracking Results to Ensure Optimum Performance and Accountability

As the case study is published, read, shared, "liked" on social media, and disseminated across other platforms like LinkedIn, leverage the available digital tools to track responses. This helps ensure that there is accountability around the performance of the media campaign.

Relevant metrics will include article and speaker placements; social shares, likes and comments; and lead generation through download requests (if the case study is available on a protected area of your website). The latter can be a valuable source not only of potential customer leads, but also data related to additional news outlets and article placements – editors frequently download this material for re-use or as background for their own reporting on the story.

In addition, it is important to invest in some level of website analytics to track page views, visitor counts, time spent reading a particular page, and other metrics. This data can help you gauge the effectiveness of different portions of the campaign (did page views increase after publication in a particular magazine, or after a video was shared on LinkedIn?) and allow for quick adjustments in near-real-time based on that performance.

Conclusion

Case studies can be incredibly useful marketing documents because of the value that other potential customers place in these types of references. While it can be challenging to identify and produce a case study, you can reap a greater reward for this investment by leveraging the content across multiple channels (online, print, social media, conference presentations, collateral material, etc.) and using that exposure to generate new leads and metrics.

It is important, however, to carefully craft the case study to speak to other potential customers' pain points, to effectively pitch the story to various media outlets, and then keep the conversation going by using social media and other outlets to increase exposure to the story. Doing so will not only help generate new leads, but also encourage a greater partnership between your company and the profiled customer.

About Spectrum Marketing & Communications

Spectrum is a full-service marketing communications firm. Founded in 1993, Spectrum was built with the "spirit of partnership" in mind. This philosophy enables our clients to extend their capabilities beyond their core competencies, while helping them to cut costs, optimize resources and shorten their time to revenue.

Spectrum's account team is comprised of senior-level researchers, strategists, writers, designers, programmers and media practitioners. The company's hands-on business model and extensive network of marketing communications professionals enable us to deliver a complete, end-to-end solution and superior client service…all at an affordable price.

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Managing the Message

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