

Case Study

Created by: *(Your Business Name Here)*



Introduction

The power of a case study can't be overvalued. Story is essential, especially in today's busy, loud and overcrowded online marketplace.

In the Introduction, describe briefly what benefits your company offers to other businesses or consumers. Touch on pain points and how your business solves these. (1-2 paragraphs)

Objective

What one takeaway do you want a client or business to take away from this case study?
Describe that here. (1-2 paragraphs--bullet points make it more user-friendly.)

Examples:

- Generating more revenue
- Expansion into a new market
- Gaining more referrals
- Solving a client problem



Lay Out the Case Study

How do your clients want to be reached? Does your demographic use video more or print?
Audio options like podcasts? Create a case study using one or a variety of methods (written,
video, audio, etc.), or a multi-media study like this one.

Once you've determined which medium best serves your clients, it's important to choose the client(s) to feature in your case study carefully. **Don't forget to ask** for their permission to be featured. It's always a good idea to obtain a Case Study Release Form. Hubspot offers [a free template](#) to make it easier for you.



Begin Crafting

Goal: What was the goal of the client or business? What did they hope to achieve through the process? (1 paragraph)

Background: Add information about the company's background, highlighting a past failure or two on their way to success. What did they try that didn't work? (1-2 paragraphs)

Analyze: What did the client or business do in order to track the data received? How did they realize their efforts were not as effective as they wanted? (2 paragraphs)

Help: How did the service or product **you offer** help the client or business? Be specific and if possible, measureable. Include data in bullet points and keep it short and succinct. (1-2 paragraphs)

Pivot: What recommended changes did the client or business implement that improved results? Be specific and offer one to three steps, not more. If there were many, choose the best, most effective changes to highlight. (2 paragraphs)

Moving On: How did the client or business make these changes stick? What protocol, system or key staff were involved? Again, highlight one or two most important steps. (1-2 paragraphs)

Goals: Close with the client or business's long and/or short-term goal as they move forward in this area. What do they hope their company attains over time? How do they see this new process/change helping them accomplish that? (2 paragraphs)



Extras

Consider adding one or more of the following to your case study:

- **Call to action (CTA)** at the end of the case study can be an effective way to drive prospective clients or customers to your website, landing page or to sign up for your newsletter. Just remember: include only one [CTA](#) or you'll confuse the reader.
- **Quotes, graphs, and other social proof** can be sprinkled throughout the case study. This lends credibility to the case study and makes it less sales-y.
- **Highlight successes and "wins"** using colored text boxes or other attention-grabbing features. These can easily be made using free online software like [Canva](#).
- **Include images and links** to better keep your reader engaged in the case study.

Conclusion

Ready to get started? Creating case studies for your business is an effective way to show potential clients or customers why they should consider doing business with you. Written well, these studies offer an inside-peek at a successful process and inspire others to work with you.

If you have questions about how to begin that aren't covered here, or need clarification as you write your case study, please feel free to [get in touch](#). Connect with me online using one of the following:

www.joychoquette.com | [Linked In](#) | [Twitter](#) | email: joychoquette@gmail.com