



### Do you want to double, treble or quadruple the sales opportunities for your business with little or no cost?

Case studies are underused. Case studies are a great way to prove to your prospects that you are great at what you do!

Share specific stories about specific successes to demonstrate you're worth trusting... You'll get more enquiries when you do.

Answer the following questions and you'll be well on your way to create a brilliant case study to win you more clients!

You will find two sections:

- A case study template for - **BUSINESS TO CONSUMER COMPANIES**
- A case study template for - **BUSINESS TO BUSINESS COMPANIES**

Choose the one which applies to you...

Once you have filled in the questions, you will have the information you need to create a powerful case study. To save time you could even get someone else to write this case study for you.

Giving you a helping hand...

Here are some excellent examples of business to business case studies by [Regus](#) and [Microsoft](#).

Also a business to consumer company, [Cocoon](#) interior designer.

---

#### A. FOR BUSINESS TO CONSUMER COMPANIES

Here are your template questions to build a case study for your company:

<b>ABOUT YOU:</b>
1. Your company name
2. What is your company's core message? - What's your company's promise? - What do you stand for?
3. Location – town/county
4. Activities - describe what your company does
5. Activities - what are you renowned for (Unique Selling Point)? (Describe what it is your customers find of value)
6. Activities - what's the history of the company? (Describe origins of your company and the involvement of the current owners/directors and any challenges they have experienced. The story background is important to provide a sense of connection for the reader and also verisimilitude!)
8. People - describe the customers you serve
9. People - name the directors/owners involved
10. People - how many employees do you have (approx)



### ABOUT YOUR CASE STUDY CUSTOMER:

11. Why have you chosen this to be a case-study story for your company?  
(Describe why you are proud to tell this story - what sort of difference have you (and your business) made - why is it your customer thinks you are great?)
12. Is this case study to name your customer or be anonymous? (Say yes to one...)
13. How long has your customer bought from your business?
14. What are the specific products/services your customer buys from your business?
15. Which product/service has been of particular benefit to your customer and why? (quote both functional (facts and figures) and emotional benefits - works really well if you can quote/paraphrase what they think and feel about your business and the product/service provided)
16. If there's a second product/service which has been of particular benefit to your customer, what is it and why? (quote both functional (facts and figures) and emotional benefits - works really well if you can quote/paraphrase what they think and feel about your business and the product/service provided)
17. Who did they use before they purchased from your business? (name more than one if relevant)
18. How would your customer describe their experience with their previous business? (describe key issues/frustrations about the technical work, the speed of work and the quality of the relationship and commitment to customer care (or not) - AND HOW IT AFFECTED THEM PERSONALLY)
19. How does this contrast with their experience of working with your business? What does your customer say about you specifically? HOW HAVE YOU AFFECTED THEM PERSONALLY - Quote your customer - paraphrase them...
20. Please describe one detailed encounter (one specific example) with your customer which encapsulates their experience of working with you and why it works so well. (It pays to mention your customer by name if possible to humanise the story)
21. What feelings do you believe your customer experiences because of the good work your business does for them (as described above)? And do these feelings benefit your customer? If it feels like you are repeating yourself it's a good thing! The power of your case studies rests in the feelings your customer experiences...
23. What statistical information can you share to help demonstrate the value you bring to this customer over time?
24. ESSENTIAL: Call to action (your business's CTA). What do you want readers to do next if they like the sound of your case study? It is essential at the end of the case study the reader has the opportunity to contact you. For example, "if you would like more information, please contact us on..."

---

### B. FOR BUSINESS TO BUSINESS COMPANIES

Here are your template questions to build a case study for your company:

#### ABOUT YOU:

1. Your company name
2. What is your company's core message? - What's your company's promise? - What do you stand for?



<b>ABOUT YOUR CASE STUDY CUSTOMER:</b>
3. Your customer's company/name
4. Your customer's location – town/county
5. Activities - describe what your customer does
6. Activities - what are your customer's renowned for (Unique Selling Point)? (Describe what it is their customers find of value)
7. Activities - what's the history of your customer's company? (Describe origins of the company and the involvement of the current owners/directors and any challenges they have experienced. The story background is important to provide a sense of connection for the reader and also verisimilitude!)
8. People - describe the customers they serve
9. People - name the directors/owners involved
10. People - how many employees do they have (approx)
11. Why have you chosen this to be a case-study story for your business? (Describe why you are proud to tell this story - what sort of difference have you (and your company) made - why is it the customer thinks you are so great?)
12. Is this case study to name your customer or be anonymous? (Say yes to one...)
13. How long has the customer's company worked with your business?
14. What are the specific products/services your customer's company buys from your business?
15. Which product/service has been of particular benefit to your customer's company and why? (quote both functional (facts and figures) and emotional benefits - works really well if you can quote/paraphrase what they think and feel about your business and the products/services provided)
16. If there's a second product/service which has been of particular benefit to your customer's company what is it and why? (quote both functional (facts and figures) and emotional benefits - works really well if you can quote/paraphrase what they think and feel about your business and the product/service provided)
17. Who did they use before they worked with your business? (name more than one if relevant)
18. How would your customer's company describe their experience with their previous business? (Describe key issues/frustrations about the technical work, the speed of work and the quality of the relationship and commitment to customer care (or not) - AND HOW IT AFFECTED THEIR BUSINESS AND THEM PERSONALLY)
19. How does this contrast with their experience of working with your business? What does your customer's company say about you specifically? <b>HOW HAVE YOU AFFECTED THEIR BUSINESS AND THEM PERSONALLY</b> - Quote your client - paraphrase them...
20. Please describe one detailed encounter (one specific example) with your customer which encapsulates their experience of working with you and why it works so well. (It pays to mention your customer's people and your people by name if possible to humanise the story)



21. What feelings do you believe your customer's company experiences because of the good work your business does for them (as described above)? And do these feelings benefit your customer's company? *If it feels like you are repeating yourself it's a good thing! The power of your case studies rests in the feelings your customer experiences as much as the financial ROI they enjoy...*

23. What statistical information can you share to help demonstrate the value you bring to your customer's company's over time (capital value, revenue, profit or earnings improvements - time freed up for other things (business or personal - employee numbers up or down)

24. **ESSENTIAL:** Call to action (your business's CTA). What do you want readers to do next if they like the sound of this case study? *It is essential at the end of the case study the reader has the opportunity to contact you. For example, "if you would like more information, please contact us on..."*