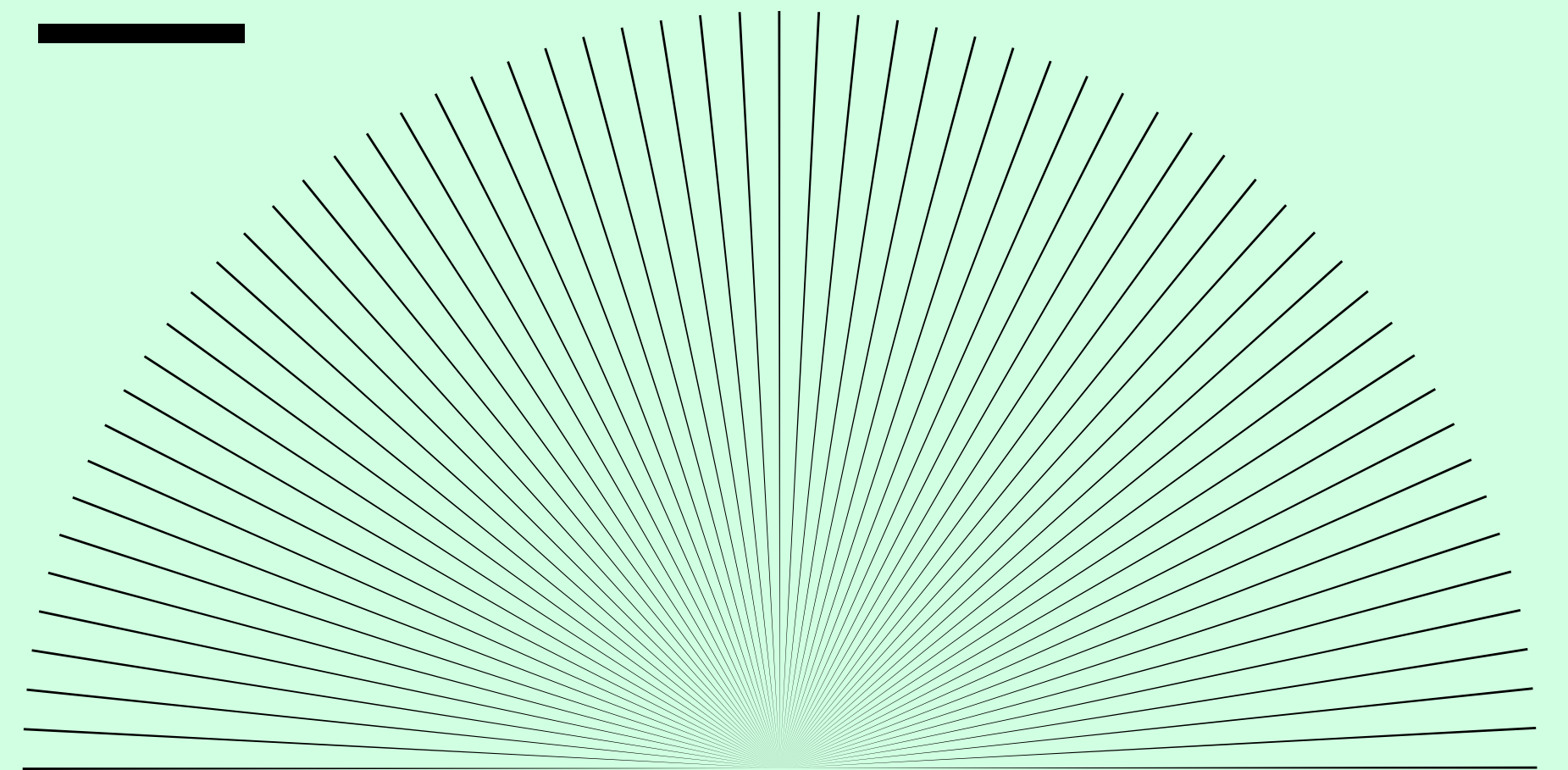


Radix

Case studies can be incredibly valuable if they showcase real, human stories and impacts. Here's how to craft the stories your prospects will connect with.

From customer
selection to
final approval —
your guide to
case studies



1. Introduction

2. The three acts of case study creation 1 – 3

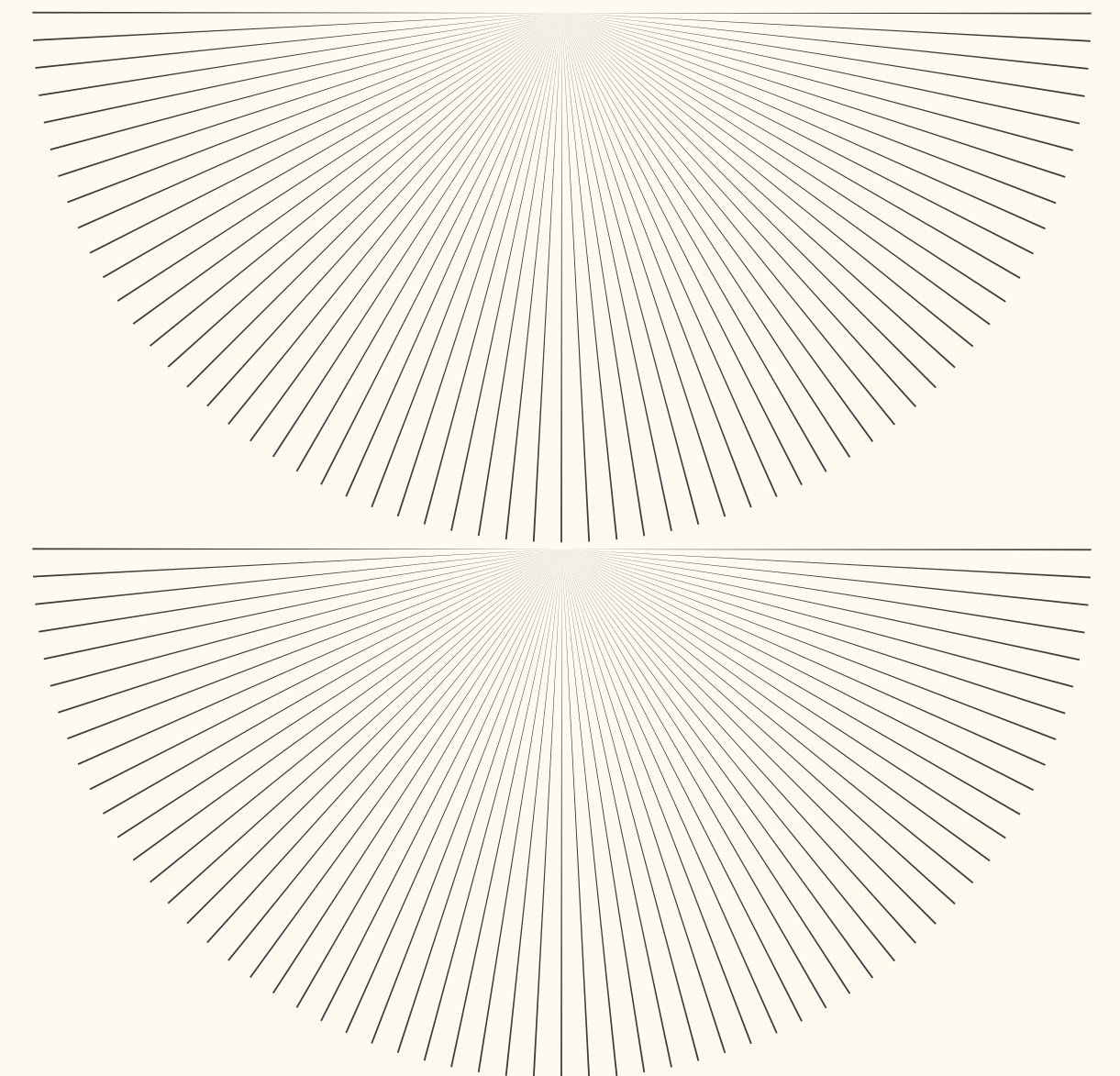
3. Checklist: How to create customer stories that engage and inspire

4. Conclusion

The best customer stories *are told human to human*

Over the next year, brands like yours will need to find a careful balance between human and AI-generated content. Budgets are continuing to be squeezed, so you need to focus your resources where they'll have the biggest impact. And one key area that needs a human touch is case studies.

Case studies tell the human stories behind major purchases — and the business decisions that go into them. And as the sea of generic content gets ever deeper, prospects need to see the evidence of authentic results delivered with real assurance and credibility.



AI can't write *effective* case studies

There's a common tradeoff in any kind of project: cost vs speed vs quality. You can usually achieve two, but rarely three.

Generative AI offers a rapid way to generate content at a low cost, but at the expense of the story's quality. And when it comes to high-value assets, it's quality you want.

So why aren't AI-generated case studies effective?

- **AI defaults to formulaic, often flat, structures.** It will twist the narrative to fit into a predetermined structure rather than shaping the structure around the narrative.
- **It generally tries to please everyone,** so it will downplay or even omit any moments of tension in the story. This can stop the narrative from being a genuine reflection of human decision-making and remove any conflict and resolution that shows how you work with customers to understand and solve their issues.
- **AI can't understand the meaning behind the story,** or its nuances. You can feed it an interview recording, but you can't trust it to know which bits are actually important and which should be cut for a better reading experience. It also can't create an emotive experience for readers, because AI doesn't laugh.

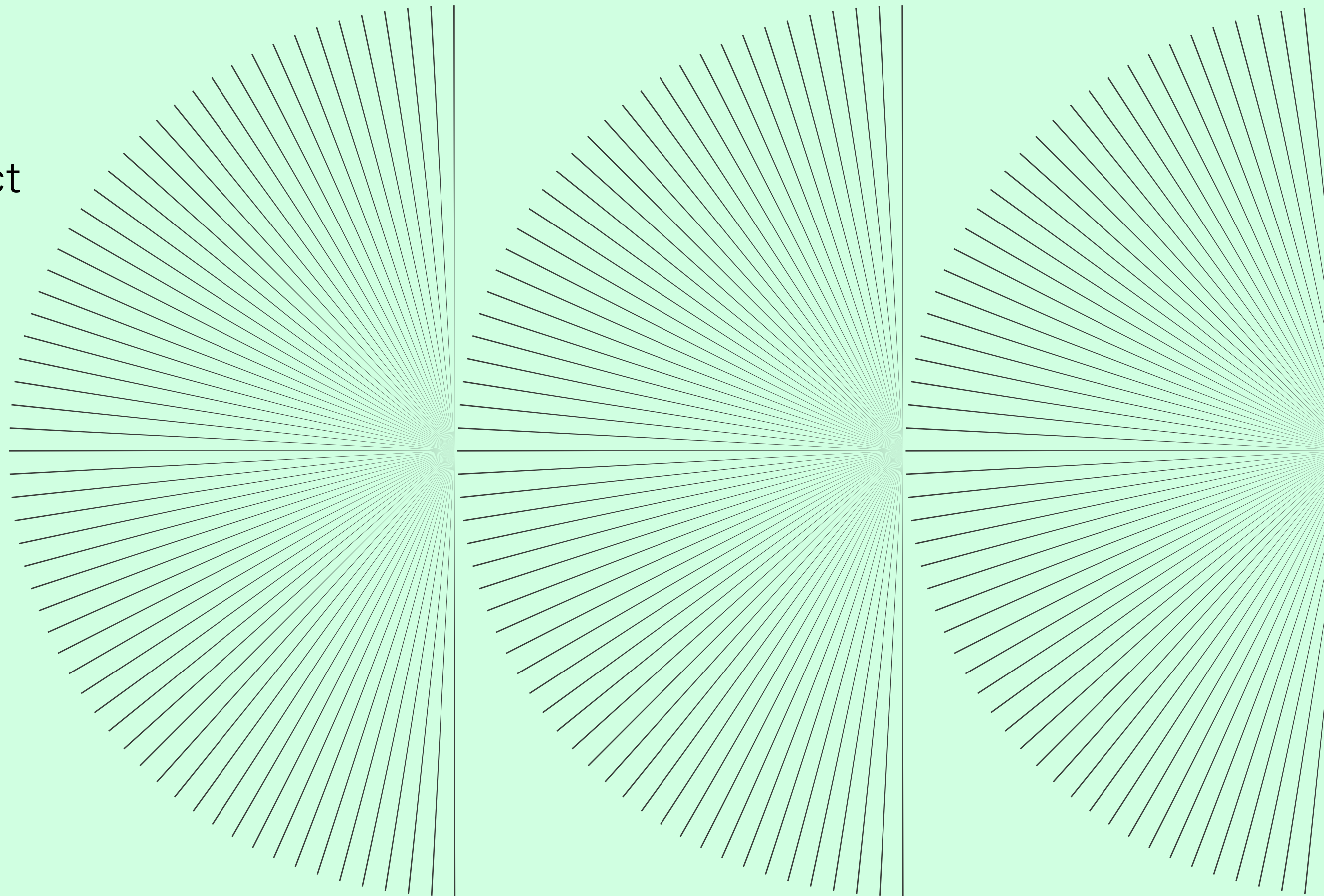
But just because AI shouldn't write your case studies, that doesn't mean it can't help. It can transcribe interviews and give you suggestions of what the overall story might be that you can use as a jumping off point.

The three acts of case study creation

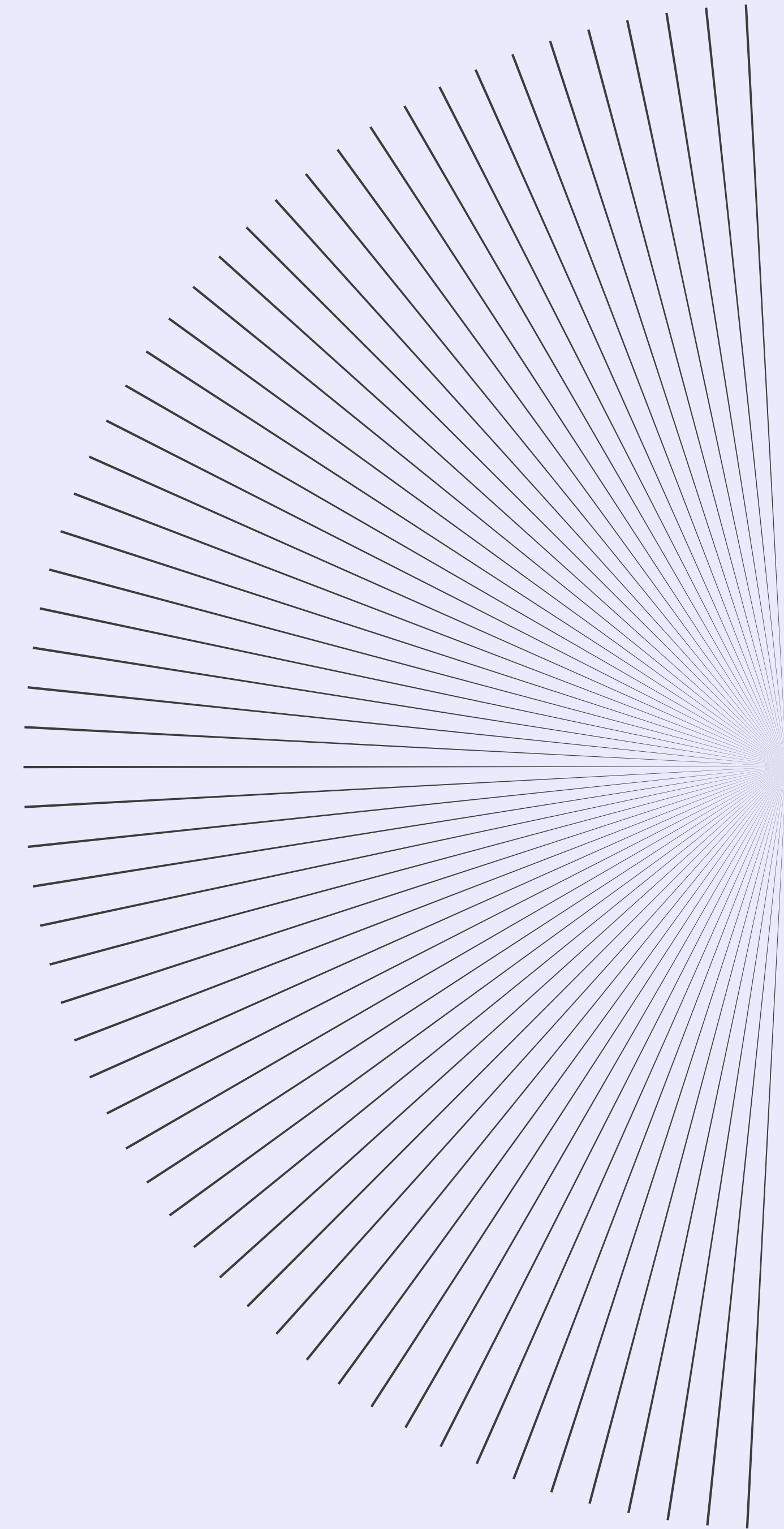
So, how do you create the kind of human stories that will make your perfect prospects sit up and pay attention?

Here's our step-by-step guide. In it, you'll discover how to:

1. Choose the right customer
2. Craft a compelling story
3. Fast-track customer approval



1.
Choose
the right
customer



Be selective: great case studies start with intentional customer choice

Creating a case study can be a drawn out — and potentially frustrating — process. So, it can be tempting to select customers based on their responsiveness. But that approach won't get you the results you need.

To create the most valuable stories, stop asking yourself, "Who are we sure will say yes?" Instead, ask, "*What kind of customers do we want to attract? And which of our current customers resemble them?*"

Look at the industries your customers operate in, their size, their location, the challenges you've helped them solve, the solutions they've used, and the results they've achieved. But don't jump the gun. It can be incredibly tempting to get going on a case study as soon as one of your customers explores an unusual use case. However, if you wait — and let those use cases run for a few months — you'll be able to tell a more compelling story with clearer results.

"In a perfect world, all customer stories would have amazing metrics to back up their success, because they can be great for helping others understand the kind of ROI they can achieve. So you need to leave enough time for the benefits to have surfaced."

Jana Newman

Senior Customer Advocacy Marketing Manager
Udemy

The best stories take teamwork

In our experience, the B2B marketers with the healthiest crop of customer stories are those with the strongest relationships with their customer-facing teams, from Sales to Customer Success. They've incentivised their colleagues to spot customers with great stories that are worth sharing. Then they evaluate the opportunity against their ideal customer profile and other story selection criteria to choose which are worth moving forward.

“The best candidates are surfaced from working closely with account teams. They talk to the customers day in, day out. They know what they've achieved, but they also know them as people.”

Jana Newman

Senior Customer Advocacy Marketing Manager | Udemy

Working with your customer-facing teams can also make the process of getting customers on board with a case study easier. But if you don't have that luxury, here are a few things to focus on to make your ideal customer want to share their story:

- **Assure them that they'll be able to shape the narrative**, creating a story they can use to build their own brand and show themselves as being at the cutting edge of their industry.
- **Let them know that if they can give you just an hour of their time for an interview**, you'll take care of everything else.
- **Remind them that nothing will be published without their final approval.**

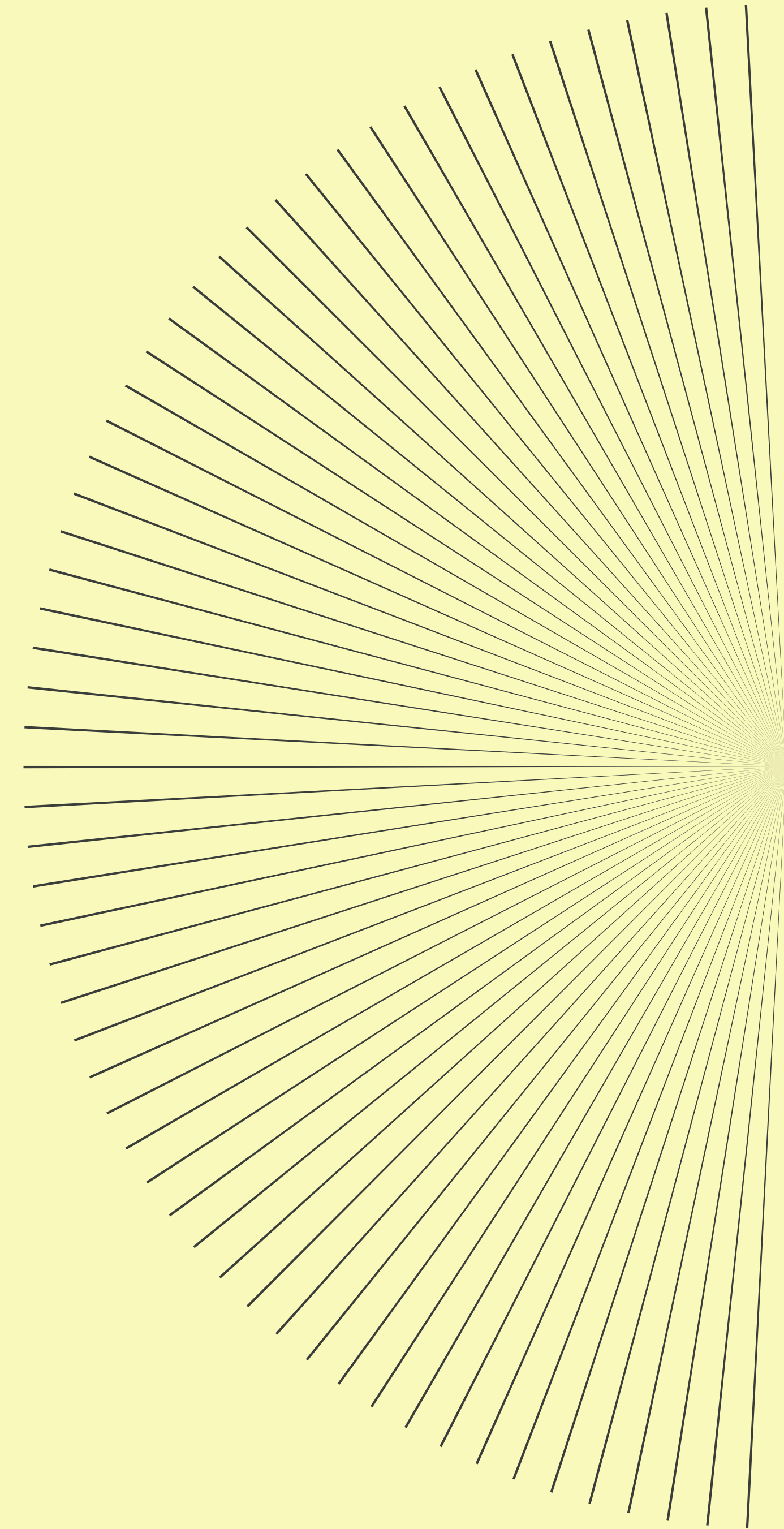
“I make it as clear as possible what customers are signing up for, so any concerns are addressed upfront, and it's easy for them to agree to participate. I'll explain that they'll join one interview call and provide time slots they can choose from. I'll reassure them that they'll see all the drafts and can approve the final copy before the story goes live.

Also, if at any point they want the story taken down, they can tell us and we'll take it down.”

Jana Newman

Senior Customer Advocacy Marketing Manager | Udemy

2. Crafting a *compelling* *story*



Preparation is everything: ask smarter questions, get stronger stories

Your interview with your customer can make or break your case study. You have a limited opportunity to get everything you need to tell your customer's story in the best way possible.

The better prepared you are for your interview, the more you'll get out of it. There are two branches to finding the right questions to ask: *understanding your brand and understanding your customer.*

- Talk to anyone in your business who has regular contact with your customer to get context you can use to tailor your questions to the things they care most about. And revisit your own marketing goals to formulate questions that will give you the most useful testimonials. For example, asking about your solution's USPs – and the impact they have – will give you quotes that are truly on brand.
- The best stories come from letting your customers expand on their answers and deep dive into the parts of your product or service they're most excited about. So, the phrasing of your questions is as important as the content.

Some customers are brilliant talkers and will naturally offer up complete answers and juicy quotes. But some are less forthcoming. *Don't give them the opportunity to get away with one-word answers by asking simple questions.*

A really quick fix is making sure your questions open with 'how'.

How to run a smooth and insightful interview

“Working with Radix gives me peace of mind. I know that I can prep with you before the customer interview and that you’ll have done your research. And I know that you’re experts in your craft and professional interviewers.”

Jana Newman

Senior Customer Advocacy Marketing Manager
Udemy

→ **Establish rapport:**

Time is extremely precious during a customer interview, but instead of diving straight into your questions, spend a couple of minutes chatting. It will put your customer at ease, set the tone for a relaxed interview, and, ultimately, get you fuller answers when you do get to your questions.

→ **Get everyone on the same page:**

It’s a good idea to outline the process customers are about to go through and alleviate any anxieties they might have. Let them know what will happen, and remind them that nothing will be published unless they’re happy with the finished story. This will help your customer relax into the interview, knowing they can alter any answers they give at a later date.

→ **Be an active listener:**

Don’t get so wrapped up in conducting the interview that you forget to listen. Acknowledging your customer’s previous answers and asking them to expand will let them know you’re really engaged — and get help your story get beneath the surface level. Recording interviews is a game-changer for this because, instead of splitting your focus between interviewing and notetaking, you can give your customer your full attention.

→ **Don’t be afraid of silence:**

People generally hate silence, and will want to fill it. If you want your customer to add more to an answer, give them a prompt: *“That sounds interesting, can you tell me more?”* Or give them a few seconds of silence to fill.

→ **Use an outsider for a fresh perspective:**

Your customer may feel more comfortable talking about your company to someone who doesn’t work for it. It’s harder to give negative feedback when someone is in the room, but it can also be harder to give glowing positive feedback, too. With an outsider conducting the interview, you might get more honest answers and better quotes.

Writing the case study: where narrative, structure, and customer focus come together

Once the interview is over, it's time to write. Case studies are perhaps the format with the fewest hard-and-fast rules, but there are a couple you still need to stick to.

1 Make your customer the hero

Case studies let prospects put themselves in the shoes of an established customer and understand your offering from the perspective of a peer — rather than from a piece of sales collateral that's all about your brand.

So, to create a successful customer story, you need to make sure your customer is always the hero. Follow your customer's journey from their challenges, through their decision to work with you, to the results they've achieved. And keep your brand in the position of helpful sidekick.

For example, when we were creating a case study with one of our amazing clients, Haskoning, we knew we wanted to highlight both the huge scope of its offering and the singular mission that ties into it all: **Enhancing Society Together.**

You can learn Haskoning's story – and the small role we play in it – [here](#).

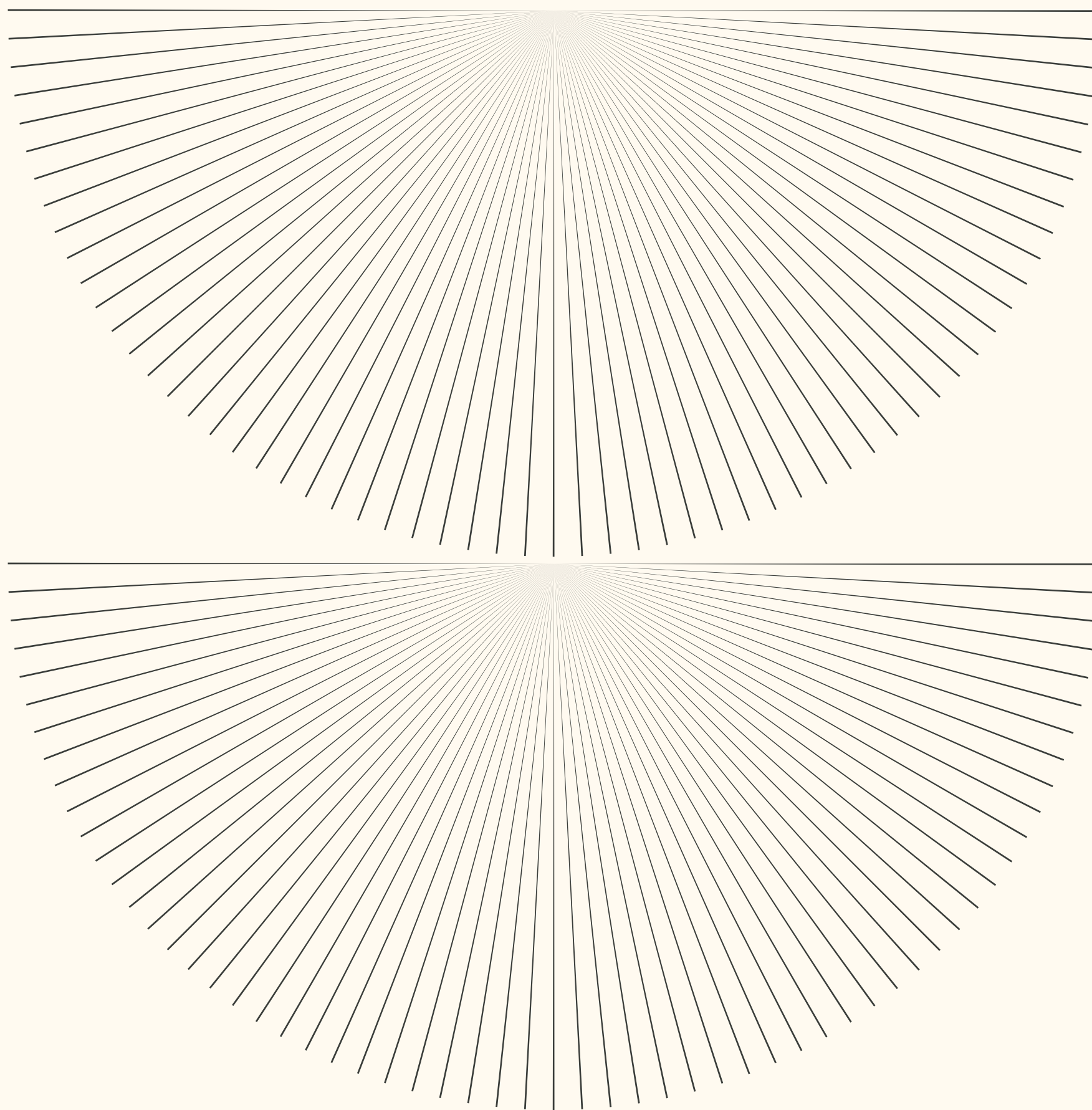
Remember you're telling a story

To do your customer's story justice, your case study needs a strong narrative arc. Instead of following a rigid format, let the narrative be dictated by the actual story.

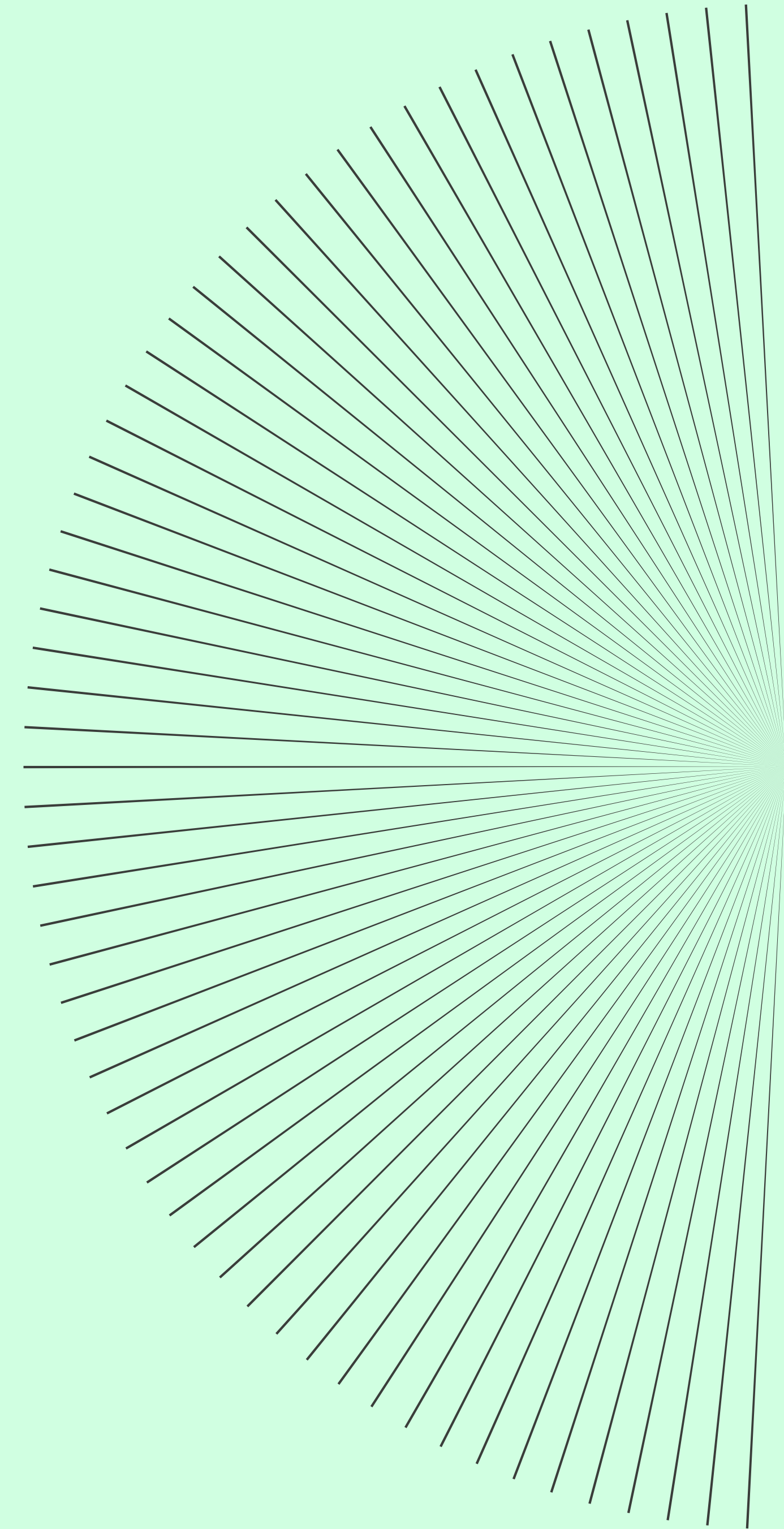
Identify your hero — the customer — and their goal, then explore the obstacles they faced, the solution, and their new (better) normal. Don't gloss over any challenges or conflicts that happened over the course of your relationship. These are the moments that will make your brand feel authentic. And focus on both the measurable results and the more intangible benefits that made your customer's working day that bit easier.

That could mean exploring the ups and downs of a relationship that's spanned decades or diving into a single project that showcases the heart of what makes it work so well.

If you want to see what the latter option looks like in practice, [you can read the story of how Mitie created a celebrated solution brochure in just five days.](#)



3.
Fast-track
customer
approval



Getting your case study across the finish line

Getting your story down on paper is a definite milestone, but it's just the beginning. You need to hone it until your customer loves it and, crucially, approves it.

To make the approvals process as smooth as possible, ensure your customer is the last party to offer feedback on the draft. There's nothing worse than the customer signing off and then having to go back to them because you've been asked to change the copy by someone on your side. *Getting your internal stakeholders on board with a draft first saves a lot of hassle.*

→ **Then, share it with your customer and make it as easy as possible for them to engage with it.** Your teams might need the story delivered in a specific template complete with metadata and other information. But for the sake of simplicity, just share the plain copy with your customer so they can quickly and easily review the story without any distractions.

“If the story is well written and complimentary about what the customer has done and what they've achieved, there's not a lot of room for things to go awry.”

Jana Newman

→ **Once you have your customer's approval, you can send your case study out into the world.** This type of asset is incredibly valuable, and it can reach even more prospects if you can cross-promote with your customer.

“That's one thing I really enjoy about my job; I get to be the advocate for those customers. They've solved problems and seen success, but they might not think that what they're doing is that exceptional, because it's their job. It's nice to take a step back and remind them that what they've done is impressive, and also really useful to other people.”

Jana Newman

Senior Customer Advocacy Marketing Manager | Udemy

The three acts of case study creation

1 Choose the right customer

Revisit your *Ideal Customer Profile*. This should guide the customer selection process. Ask yourself:

- What kind of customers do we want to attract?
- Which of our current customers resemble them?

Get your sales and customer success teams involved in spotting opportunities. And look at industry, size, location, challenges, and which of your solutions customers are using – and how long they've been using them for – to identify the most valuable stories to create.

2 Craft a compelling story

A good customer interview is the foundation for a great case study:

- Prepare relevant questions – for your customer and your marketing goals.
- Establish rapport.
- Get everyone on the same page.
- Be an active listener.
- Don't be afraid of silence.
- Use an outsider for a fresh perspective.

When it comes to writing your customer story, *always bear in mind the two golden rules*. Make sure your customer is the hero. And follow the narrative, not a template.

3 Chase customer approval

Approvals are easiest to get when you keep the process organised and efficient:

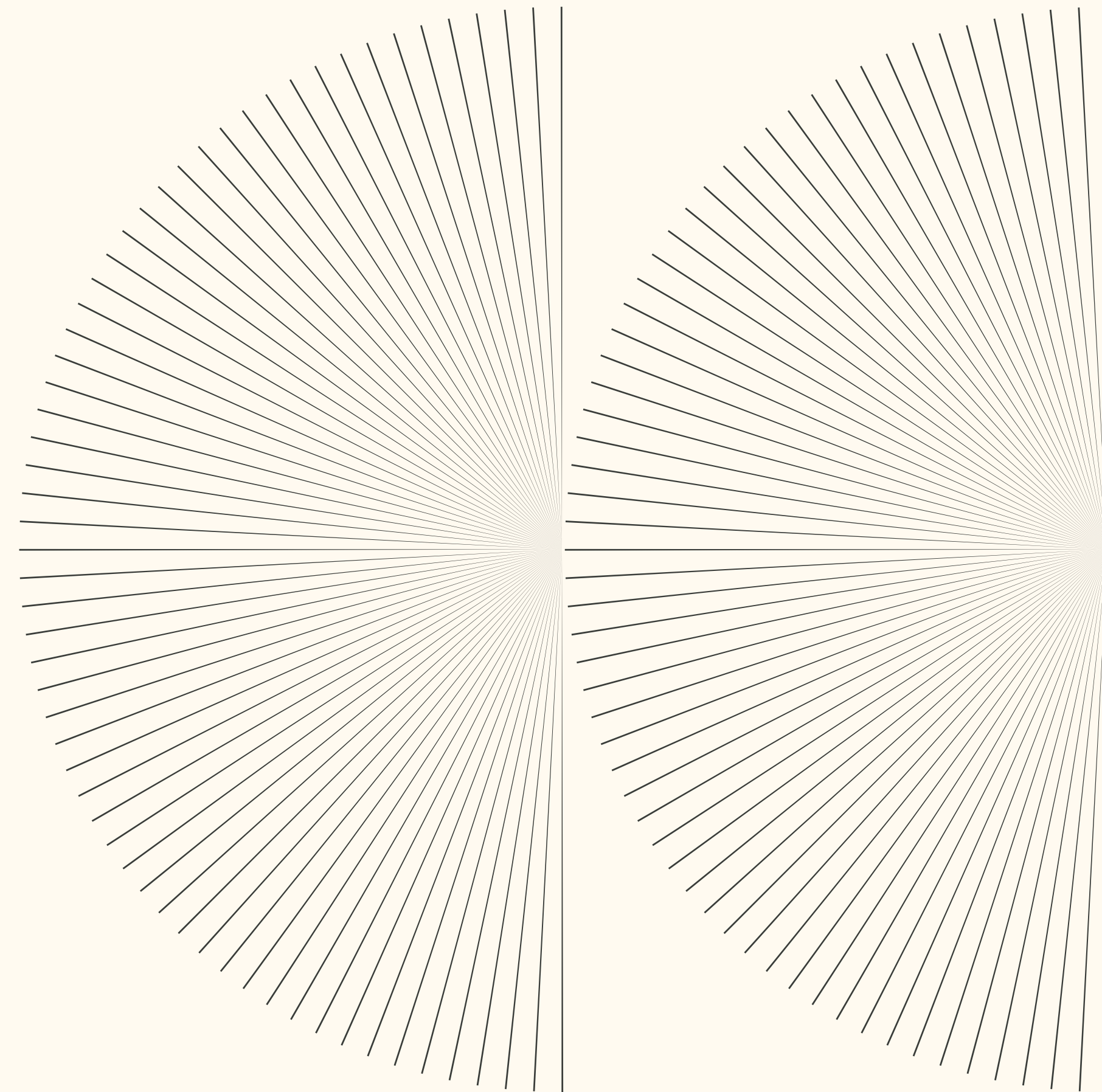
- Get your story drafted – and your internal stakeholders aligned – as soon as possible after the interview. Then get a draft you're happy with to your customer for feedback.
- Encourage customers to be as clear as possible about the edits they want.
- Then, if possible, cross-promote it with your customer to reach prospects across multiple networks.

Customer stories: *your human advantage*

Case studies provide real testimonials and results wrapped up in an engaging and emotive narrative. They're incredibly valuable assets, so when considering where to spend your time and budget, they should be top of the list.

At Radix, our team of experienced writers can support you throughout customer story creation. We're adept interviewers who can guide insightful conversations that unlock the real story within your partnerships. We can write compelling and authentic human stories that capture people's attention. And we can work with you to tweak and amend the copy until both you and your customers love it.

Contact us today to get started.



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