

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.