How to Write a Good Case Study part three transcript

Hello, and welcome to part three of How to Write a Good Case Study. In the previous two sections of the course, we've looked at the aim of a case study and we've looked at the components of a case study. In this section, we're going to get really get down to the nitty gritty and look at how you actually put a case study together. There are, in essence two parts to a case study. There is your part and your involvement and your client's part. We are going to look at both in this section, and we're gonna start by looking at your part. So the process of putting together a case study starts really with, with interviewing yourself in a sense. There are a series of questions that you need to run through to give you the facts that you'll need. These questions are all in a download associated with this video in a pdf. So please feel free to download that and then refer back to this every time you need to write a case study in the future. The first question is to answer is who was your client and what do they do? This is going to help your readers show the sorts of companies that you deal with. It's gonna help potential customers see that you help people like them, and it also helps demonstrate the scale of the businesses that you deal with so that, that people are reassured that you're not either too big or too small for them.

The next thing to ask is what the budget was. I will cover this later on because it may be relevant to include this or it may not. The same with the third question. What was the time scale? It might be appropriate to include this or it might not.

The next question to answer is how your client found you. Doing this helps set the scene and helps your reader get into the mindset of a customer. So it could be that they could find the solution that they're looking for by searching on the web or by asking business acquaintances. In essence, it's gonna help to show that you are easy to find if people need you. If it happens that the project came about because of a referral, this is a great way to prove that you are good at what you do because you're good enough to be referred by your previous customers, which is a great testimonial to have early on in the case study. The next thing to look at is what your client needed. It sets out the requirements that they came to you with. It's about the problems that they were facing. This is the doom and gloom scenario that I talked about in the previous video. It's a great way to show the sorts of things that you are able to handle, and it's a great way for your reader to step into the shoes of your client and, and see that they're having similar problems themselves.

The next thing to ask is why your client appointed you. This is how you establish your credentials. It might be that you were cheaper than your competitors, or you were able to do something faster than than your competitors. Although in both these cases, I would say take care. If you trade on price or you trade on speed of response, then that's great, but if you don't really want to be associated with bargain basement prices or rush jobs, then you might want to think about other things that you could include as to why your client chose you in this scenario. It's a risky sort of thing to get into unless you're very careful. I think the next thing to ask yourself is what the solution was, and this is where you showcase your expertise by outlining the solution that you came up with for your client's problems.

Hand in hand with this is the unique or interesting or challenging features of the project because this helps to show that you are a cut above your competitors. If you're struggling to think about how the project was unusual because you are used to dealing with things that are kind of complex I'd say to think about the areas of the project that that lesser contractors might have struggled to fulfill, say a particularly complex technical requirement or working with or around other contractors or a tight time scale. Again, you know, be wary of this. If, if you don't like doing things to tight time scales, it might be that you needed to work with multiple stakeholders and handle multiple opinions. It might be that the requirements of the project changed halfway through.

It's also worth thinking about things that your client might consider to be a problem, but you might not necessarily agree with. So think about the initial conversations that you had with the client when they came to you and think about what they were particularly concerned about that you might or might not be able to cope with. That will give you an insight into what your target market is worried about. And you can help to address this in this section of the case study. And then again, to establish your credentials, you need to look at how these factors were overcome and, and what you did to get over them and address the stumbling blocks. Once you've answered all of these questions and gather together this information, the next step is to interview your client.

Again, these questions are available as a download associated with this video so that you've got a checklist that you can run through when you are interviewing your client. So these are the questions that you need to ask your client. Now, when I say you, I often find that it's helpful if somebody other than you asks the questions, somebody who wasn't closely involved in the project. I say this because you'll typically get much better answers that are much more usable in the context of a case study because your client will be explaining themselves in a lot more depth because they know that the person they're talking to isn't intimately knowledgeable about the project, and they won't be taking it for granted that that you know what it is that they're talking about or referring to. If you've got an outsider doing the interview, you might also found that, find that you'll get more candid feedback, which while you might not want to include it in your case study, it is really useful to help you improve your processes and your service because you know, you'll get the kind of the honest opinion on the things that didn't go quite as well as, as they might have hoped.

These questions build on the questions that you asked yourself earlier on, and provides the alternate viewpoint. So the first question is, is why the client decided they needed help and the problems that they needed solved. Essentially this is the scope of the project in their words because often you might be able to use a direct quote that completely sums up or describes the problem that you can use. It'll likely be more emotive and more honest than anything more professional of the spin that you might put on it if you put it into your own words. So, it is great for letting people, you know, jump into the heart of a problem. However, do sense check their description of their problem. Your client has got a reputation of their own that they need to protect. The way they describe their issue to you may not be the same as they'd describe it to someone else. Take care to make sure you're not making them sound too hopelsss or inept in this description.

The next question is why the client chose to work with you. You are asking this because it's great scope for a testimonial that you can use not only in the case study, but also in other materials that you put together.

When you do this you quite simply, you are just getting a testimonial that describes why you got the job in the client's own words. So if they say you were the best contractor for the job, it's gonna sound a lot better if it's coming from their mouth in the case study rather than your mouth, because it'll sound an awful lot less boastful. The next question is how did you find working with us? This is great scope for general feedback that helps you improve, even though you might not include it in the case study. It's also a really good way to showcase and explain the value added extras that you might include with every project that aren't necessarily worth mentioning in and of themselves, but they are good points to make in the context of a case study.

It might be that you were very clean and tidy when you were on site, or you delivered everything that you said you would when you said you'd deliver it. You were never phased by anything. You were very proactive, that sort of thing, the things that aren't key selling points when you're talking about your services, but they are useful and reassuring things to know from the perspective of a client. Finally, it's in the core questions for your client. It's the question about the outcomes of the work that you did and how it's helping their business. It is essentially the heart of the case study. It's the results. It's did your work work. If you can get cold hard statistics here, that's great. You know, the sales training that you gave helped them to grow by 50% in six months, or the client gets 60% more orders than they did before you started your work.

You want the kind of the less tangible factors. So we're so much more confident when we're doing our work now or that the work you did is has made their their lives easier on a day-to-day basis. Essentially what you're trying to do with this section of the case study is demonstrate that your work left your client in a better state than they started in. Then there are a couple of ongoing questions that may or may not be relevant in each case looking at the work that you do for them on an ongoing basis. So if you are doing ongoing work, it's great to flag that up because it's going to show that you form long-term relationships with people and you continue to help them even after the main body of the work is finished. Um, one final point when you are interviewing your client when you've put the case study together, do make sure that you go back to your client to get sign off on it before it's published, because it may be that if there are quotes in there, they might need to get it signed off by a superior or, you know, it might need to go through their marketing department just for approval. It's just good manners to, to get it signed off.

So once you've got this information together, you need to decide on your level of detail. Essentially, this question is, are you going to do the case study anonymously or are you going to give names and details like that in the case study? So this is the thing where you look at whether you want to include the company name, whether you want to include details of the budget, whether you want to include the dates that the work took place. These are essentially questions for you and your client decide. It may be that your client is happy to be a subject of a case study just as long as the name isn't mentioned in there. So that answers that question. Um, it might be that you are unwilling or uncomfortable to share client names on in public because you don't want your competitors to know the companies that you are working with.

I would say ultimately go with your gut instinct on this one, but do on the other hand, keep your customer in mind. You know, for example, if you did some work with Marks and Spencer, it's got more resonance and more kudos than simply saying a national clothing retailer, for example. On the other hand, it, it may be enough to say that you worked with a local firm of solicitors. You don't need to mention that the name of the company was say, Healey and Partners or something like that. Um, in the case of a budget if you include a budget, it sets people's expectations about the level that you work at. But then on the other hand, if you're working at all budget levels, it may be helpful to have examples at all different budgets to avoid pigeonholing yourself.

If you've only got the kind of the multimillion mound pound project on your website, for example, rather than the ones that were just million, the thousands. When it comes to dates I think it's simply a question of how quickly is the case study going to be outta date? So, you know, if you don't wanna be having dates on a case study, if you're still planning to use it in five years time because it's just gonna look out of date. So whereas on the other hand, if you are writing case studies every couple of months, then including dates is a good thing because it, you know, it's showing currency and recency for you.

So there we go. Um, that's the final part of this section of the course. The key to putting together a case study is to arm yourself with your facts and your client's opinions. I would say that writing a case study is a bit like stir fry cooking. It's very quick and easy to put a case study together. But the groundwork of chopping everything up or, or getting all of the facts together at your fingertips it takes time. But once you've done it, it makes the process of putting the case study together or, you know, cooking the stir fry an awful lot easier. So that's it for this section of the course. In the next section of the course, we will look at the right writing style to choose for your case study and look at a few examples in action. So I will see you there.