

# Six Keys to Writing a Great Case Study

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MarketingProfs.com

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Making it all about the other person—that seems to be one of the marketing flavors of the month.

I'm talking about the marketing premise that great salespeople have known, accepted, and practiced forever. (Think Dale Carnegie.)

So, how do *you* do that?  
How do you put the spotlight on your clients, customers, prospects, and anyone else who matters?



More and more businesses and institutions know the answer to that one. They're using case studies—one of the most powerful tools available to shift attention to the other person and away from you.

Case studies (or variations, such as testimonials) are showing up just about everywhere. They're getting baked into advertising, Web sites, brochures, and all kinds of other collateral and marketing materials.

Despite their popularity, some marketers would rather have a tooth pulled than write a case study. So, first, relax. This isn't law school.

"Case study" is really just another way to say "storytelling." The best ones recognize that we're all pretty nosy, and that we all connect on a primal level with anything that begins with "Once Upon a Time" and ends with "And They Lived Happily Ever After."

So, how do you get there? How do you write a case study that shows you care, makes your clients feel good, and (indirectly) demonstrates your credentials?

When I write or edit a case study, especially for a professional service provider, I follow Six Keys.

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Keys? More like guidelines. And several overlap, so six is pretty arbitrary. Anyway, if I had to name one that's essential, it would be the first one.

**Be engaging**

The best case studies are the ones that get read. After all, what's the use of being brilliant, having great clients, or doing exceptional work if your packaging is dull, turgid, or abstruse? (Hint: Avoid using words like abstruse.)

What gets read? Start with a strong lead, one that hooks the reader. Notice, for example, how I titled this essay. Think of this as the literary equivalent of search engine optimization.

Then keep them hooked. Cut to the chase. Use active, vivid, and memorable language. Warm, approachable, and down-to-earth words work really well. So does the use of wit.

Vary sentence length. Anything with 14 words is toward the long end.

Don't be a schoolmarm. One-sentence paragraphs and other grammatical liberties are OK.

This is the realm of the right hemisphere of the brain. (See Key #4 for the left side.)

**Be a storyteller**

All good stories have a beginning, middle, and end. Introduce the business problem, describe how it was lawyered, engineered, or whatever... and wrap up with how the problem was resolved.

Offer a sense of scale. (Remember: It was a *Big* Bad Wolf that threatened the Three *Little* Pigs.) Use dollars, complexity, difficulty, sophistication, size, acreage, importance to the client's business or its industry, and so on. Try to use the client's name, particularly if you're writing about Google or George Clooney or any other client with cachet.

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Give your case study a face, if possible. Make things less abstract. Remember that people buy from people... and that the best advertising is the stuff where the person sees themselves (or, at least, another person) in it.

**Be strategic**

What do you want your readers to believe about you or your client? What is it about the story you're telling that sets you and your business or client apart?

This is what brandinistas might call the value proposition. It's whatever image or value you want people to associate with you.

This is the Key that has you saying, "There are a lot of great plastic surgeons (or whatever) out there. But how many can do *this?!?* Ha! Take *that*, competition!"

**Be thematic**

Brevity (i.e., 250-300 words) is hard work. Voltaire (or was it Flaubert or Descartes—or Twain) wrote, "I didn't have time to write a short letter, so I wrote a long one instead."

Make every word count. It's more engaging.

Get right to the point. Let your reader in on why you're writing... and why they should take the time to read it. Avoid puzzles.

Here's another tip. Readers are busy people. So, be conservative with their time and cognitive powers. Most have the attention span of my three-year-old. (Except, of course, the readers of marketingprofs.com and anyone dosing on Ginkgo Biloba.)

Go back to basics. Use topic sentences.

Being thematic is the framework for everything. It's a discipline that transcends conciseness or clarity. Being thematic demands that every document, paragraph, sentence, and word serve a purpose. Find it. [That, by the way, was an example of stopping the music. See Key #5.]

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This is left-brain stuff (in case you're getting a headache).

**Be proportional**

You're not writing case histories. So, ground your reader in the who-what-where-when-why-and-how essentials. Don't smother them.

And, don't stop the music. When you pause too long for facts, figures, or other background data, you lose a lot of readers.

Remember what your six-grade teacher said about paragraph transitions.

**Be sympathetic**

Put yourself in the other person's skin. Your target audience probably includes (a) business people and (b) other professionals, in-house or not.

Whoever they are, your readers are probably running a business or some other big organization. Speak to these needs. Speak *business*. Not lawyer, architect, engineer, and so on.

It's worth underscoring why being sympathetic is a good idea. Go easy on numbers, abstractions, and anything else that asks the reader's brain to process or remember.

\* \* \*

Want extra credit? There are two enhancements.

The first is to make the top and the bottom of the case study touch. It's something else your six-grade teacher suggested when you got to Effective Essay Writing in the English curriculum. Stand-up comedians refer to this as a call back. Whatever you call it, it's just another way to help your reader remember the reason they started reading in the first place.

The other is to be visual. This isn't as hard as it might sound. Inserting a compelling image (even if it's simply the client's logo or headquarters) helps arrest the reader's attention. That's key when they're firing through a report or

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Web site. Couple this with a snappy, strategic caption, and you can declare victory even if your reader doesn't notice anything else.

I'd call *that* engaging, storytelling, strategic, thematic, proportional and sympathetic.

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