GUIDE TO EFFECTIVE Case Studies



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Lisa Toner

Content Strategist

HubSpot

@lisatoner13

Why Do You Need Case Studies?

When shopping for a new product or service, who do you trust the most? The sales guy, or the customer who has already used the product or service?

Getting a real life opinion from someone is always more helpful, because it's both unbiased, and often rooted in a common experience. In fact, according to <u>Search Engine Land</u>, 9 out of 10 people are looking at online product reviews and posts on social networks, before making a purchasing decision.

Case studies help your leads envision how your product or service would fit into their lives, and often act as that missing piece that moves them to take purchasing action. They think, "If this person had these results, just imagine what kind of results I could see!"

While each of your case studies will tell a slightly different story, they will each have the same core components that let your leads envision themselves using your product or service. In this case study starter kit we'll break down those case study components and give you everything you'll need to create case studies that will help your sales team close more of the right deals. Let's start with how to find the right customers and how best to reach out to them for doing a case study with you.



Find the Right Candidates

If you have a wide breadth of companies featured as case studies, you'll be equipping your sales organisation with the collateral they need to close deals across all verticals, industries, and personas.

WHAT TO LOOK FOR:



Product knowledge

Look for customers who know your product or service front and back -- they're probably happy because they're leveraging features and functionality to their fullest so they can speak about their experience fluidly. Also, if there's a specific part of your product that you're trying to promote, you can look for customers who are seeing success with it and focus your story on that.

Exemplary results

Look for customers who are seeing great results – these people are usually eager to share it with the world, and make for plenty of great quotes and sound-bites, not to mention the enthusiasm necessary to create engaging content.



"Previously it would have taken a week and involved IT help, but with HubSpot I can build an entire campaign myself and launch it within a day."

Andrew Morris, Digital Marketing Specialist, Claranet

Get inspiration from this 'product knowledge' case study <u>here</u>



Unexpected customers

Often, leads question whether or not your solution is really the right choice for them . If they can see a non-traditional customer seeing stellar results with your company, who's to say they won't have success, too?

Big name/recognisable brands

If the big players in an industry are vouching for your product or service, this lends credibility that the smaller companies can't offer.

Switchers

If you have customers who used one or more (more is best) competitive products/services before they came to you, these stories are like gold dust. Getting them to tell your prospective customers why you're better than your competition will hold far more weight than your own brand saying so.



"We switched from Eloqua to HubSpot because we felt it was the most complete solution available in the market."

Michael Freeman Senior Manager of Search & Analytics, ShoreTel

Get inspiration from this 'Switcher' case study <u>here</u>



WHERE TO LOOK:

Sales Reps

Ask your sales reps what they need, first. Where are they struggling to close deals, what are your top verticals? What part of your offering is in demand and what do you need to prioritise?

/ Services Team

Your customer service and account managers hear from your customers all the time and know the types of projects they are working on and the success they have seen so will be able to make great recommendations for case studies.

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Social Media

Have a look on social media to see which of your customers are talking about you and what they're saying. Chances are if they're happy to talk about you publicly on social, they'll be happy to do a case study, too.

Krissy Dolor @krissydolor · 20h

I have to say, one of my favorite tracking tools lately has been @HubSpot's @sidekick app for emails. #thisemailhasbeenviewedfivetimes

★ 13 ★1 ···





Review Sites

Check the review sites that are relevant to your industry and see if you have been reviewed by any of your customers already. It's a good idea to keep a backlog of these to use in sales pitches but also to reach out to those customers to create a full case study.

CRM Dashboard

Use your CRM system or customer database to do your own research; what industries do the majority of your customers fall into? What is your most/least popular products or services? Where is the most of your revenue coming from?

Events

Hosting events for your customers is a great way to speak to them one-on-one and find potential candidates for case studies.

3rd Party Review Site

HubSoot

What do you like?

The HubSpot software is so intuitive. Creating emails, blogposts, landing pages in Hubspot has helped my team cut their work in half. We all really enjoy the clean and easy to use interface and the ability to integrate other apps and software. However, the best thing about Hubspot is how micro we can get with segmentation. Segmentation is the foundation of effective marketing. Hubspot allows us to not only customize our lists, but get a very clear understanding of every one of our customers... <u>Read</u> <u>More</u>



Reach Out to Participants

Now that you have decided who you are going to reach out to, the best way to start is sending out a short email congratulating the customer on their success, and then explaining why you want them to be featured in a case study.

POINTERS FOR PUTTING TOGETHER YOUR EMAIL:



Be complimentary. Boost their ego and make them feel really special so they will be more likely to say yes to going public with their experience.



Keep your introductory email quick and void of the nitty gritty details. Simply suggesting a time and date to chat further is a good way to broach the subject without overwhelming them.



Attach the questions you'd like to ask so they can look over them as they decide whether or not they want to participate.



If you received them as a referral from someone on your sales or support team, mention them by name in the email. It will make the customer more comfortable seeing the name of someone they know.



Remember that your customers are just as busy as you are, so don't expect every customer to respond to you as soon as you email them. However, you need to communicate deadlines for completion so that it doesn't drag on forever and become a nuisance for everyone involved.



When you do get a response to your initial email, schedule a time for a phone conversation to conduct the interview – your questions need to be open-ended so doing the interview in-person or over the phone will get you the best answers.



Be aware that you may need to speak to multiple people within the organisation to get the full story.

Below is an example from one of our initial case study emails that we send out to set expectations early on.

Below is an outline of the general timings and effort required:

- The typical timeline to completion and publication of the case study is 2 weeks, depending on availability and turnaround time of any draft versions.
- Your involvement will require approximately 1-2 hours of your time. This includes, completion of the attached release form and questionnaire, a short phone interview and review and sign off on draft versions of the case study.



Prepare Interview Questions

To write a great case study, you have to ask the right questions. Always ask open-ended questions to keep the conversation fluid, but direct the customer to the topics you want to cover. The questions you ask should help tell a relatable story impressible and believable results.

Their Experience Before Using Your Product/Service

- What were you using before this product/service?
- Summarise three points of frustration you faced.
- What was the big a-ha moment when you decided you needed to try something new?
- What were the top reasons you selected this product/service?

Experience Using Your Product/Service

- How easy or hard was it to get started with this product/service?
- How has it helped you to overcome the challenges you had before?
- How is it different than other alternatives you've tried?
- What is your favorite feature? Why?
- Tell me about the most positive experience you've had using this product/service. (Probe for specifics)

Their Results With Your Product/Service

- How has this product/service helped you achieve your business or personal goals?
- What specific metrics can you share about the impact it has had? (you may need to follow up to get these)

Why They Would Recommend Your Product/Service

• What is the single biggest reason you would recommend our offering?



Conduct the Interview

It's important to conduct your interview in such a way that makes your customer feel comfortable and confident to share their story as well as encouraging them to share the details that will make your case study a convincing one for similar companies looking at your product/service.



Keep your questions clear and concise but also open-ended. They shouldn't be able to answer yes or no to anything.

By keeping the interview conversational you'll encourage them to chat more openly about their experience which can bring them down avenues you didn't expect and can result in some really unique and interesting sound bites.



Sometimes customers have a hard time articulating what they are really trying to say. If an answer doesn't make sense, make sure you follow up for clarification so you get their story right; they'll appreciate you taking the time to ensure they sound coherent.



You may have also noticed that a customer touched on a really important point your company is trying to emphasise -- it's okay to ask a few more follow-up questions about that point, too.



Keep in the back of your mind that you will want sound-bites to highlight in your case study so make a note of anything you hear throughout the interview that you think would make a good sound-bite. You can use this to your advantage by re-phrasing what they've said back to the customer in a way that makes sense for the case study. For example, "When you say X, did you mean XYZ?", expanding on the point and getting your customer to agree.



Layout the Case Study

Now that you've carried out the interview and you've gotten a tonne of useful information from your customer that will make a great case study, you need to lay it out in a way that makes sense for the reader. Here's the format we've found to be the most effective:

THE CHECKLIST

Executive Summary

About the Client

The Challenges

The Solution

Show the results

Call-to-Action





Executive Summary

Less than 50 Words

Provide a mini headline once you have your reader's initial attention.

Write 2-4 sentences summarising the whole story, making sure to include the most relevant points of the case study.

ShoreTel Moves From Marketing Automation to Inbound Marketing with HubSpot

The Demand Generation team at ShoreTel believed in inbound marketing, but didn't have the right toolset to implement it. The main system they used was Eloqua, which they found to be inflexible, slow and not user friendly. When the opportunity came up to evaluate other marketing software options, they jumped on it and soon chose HubSpot.

ShoreTel®



About ShoreTel

ShoreTel, Inc. is a leading provider of brilliantly simple IP phone systems and unifie communications solutions. Its award-winning on-premises IP-PBX solution and cloud-base hosted phone system, ShoreTel Sky, eliminate complexity and improve productivity. ShoreTel is headquartered in Sunnyvale, Calif., and has regional offices an partners worldwide.

Topics: Content Creation, Technology, Lead Generation, Video, Communications, Salesforce, Social Inbox, Smart Content, Campaigns, Website Traffic, Eloqua, Marketo

Executive Summary

Less than 50 Words

Tag your case studies so that they can be easily found by your sales team and prospective clients



Showcase 2-3 bullet points with metrics that prove your client's success.

About the Client

Pull a short description of your client from LinkedIn or their company website and be sure to hyperlink the company name to their website.

About ShoreTel

ShoreTel, Inc. is a leading provider of brilliantly simple IP phone systems and unified communications solutions. Its awardwinning on-premises IP-PBX solution and cloud-based hosted phone system, ShoreTel Sky, eliminate complexity and improve productivity. ShoreTel is headquartered in Sunnyvale, Calif., and has regional offices and partners worldwide.

The Challenges

Less than 100 Words

Write 2-3 short paragraphs describing what your client was doing before your product/ service and what challenges this presented and/or what goals were trying to be achieved.

What were the challenges they faced before contacting you?

"Last Generation" Marketing Tools Limited Their Ability to Execute

Michael Freeman, Senior Manager of Search & Analytics for ShoreTel, was frustrated by how the limitations of the marketing tools used by the team impeded their ability to execute their ideal strategies. The main system they used to support shoretel.com and shoretelsky.com was Eloqua, which they found to be inflexible, slow and not user friendly. "You either had an extremely limited set of tools to work with or you had to go hire a custom developer to implement a basic landing page... It became something I dreaded logging into," says Freeman.

The whole team believed in inbound marketing, but didn't have the right toolset to implement it. When the opportunity came up to evaluate other marketing software options, Freeman jumped on it.

Note: Think about the challenges that are most common in your target audience and that will resonate with the most people.

The Solution

100-150 Words

Write 2-3 short paragraphs describing how your company worked with your customer to find a solution to their challenges and implement a winning strategy. Describe how they are now using your product/service to solve their challenges from the previous section.

How did your product or service solve their challenges?

He required a system that would grow with the business; this eliminated many vendors when combined with his desire for software that is <u>easy-to-use</u>. His decision came down to HubSpot and Marketo. "We felt that [Marketo was] a new and improved version of marketing automation but that's only a part of what we were trying to implement with inbound marketing... We chose HubSpot because we felt it was the most complete solution available in the market, and more importantly, would continue to innovate in the market because someone at HubSpot is always asking: how does that fit into inbound marketing?"

Note: This is the section where you can make your offering shine, so don't be shy.

Results

Write a 2-3 paragraph conclusion to prove that your product/service impacted the customer's business and helped them to achieve their goals. End your story on your client's aspirations for future growth with your company, if appropriate.

Feel free to repeat the metrics from the bullet points in your introductory section as part of the text, particularly if they've been able to quantify or speak to the ROI of their investment.

ShoreTel Responds to the Market Faster with HubSpot

Freeman is a stickler for analytics and has the metrics to show that ShoreTel's decision to take a more inbound marketing approach and use HubSpot has paid off. Year-over-year, he has seen a 60% increase in organic search traffic, a 36% increase in leads and a 110% increase in qualified leads.

Most of all, Freeman finds having an all-in-one marketing platform helps him to execute his marketing campaigns more quickly. "Part of being successful at inbound marketing is to be fast and agile and have analytics... too many systems just create hurdles for you. Having one integrated system helps me create campaigns faster and address the needs of our market."



Pick one or two quotes that you would feature at the bottom of one of your case study's sections. Include a head shot of your customer alongside the quote.

Feel free to insert additional quotes into the body of your case study if you feel you have enough and they are compelling.

"What makes HubSpot so appealing is its all-in-oneness. The fewer tools that I have to use, the better off I am. It's easier to get people trained. I'm less likely to have to jerry rig things together to make them happen."



Michael Freeman Senior Manager of Search & Analytics ShoreTel

Visuals

Images

Use an image that highlights your product or showcases how that customer used it – not just an image of your product – it should show how happy it made their team, the success they saw and bring the story to life.

Video

While simple, written case studies are the easiest to pull off with little resources, you can also think about video case studies which can be really effective.





Call-to-Action

One of the most important parts to a case study is the call-to-action. Now is the time to invite your reader to fill out a form and/or talk to your sales team.

Are YOU evaluating marketing software? If so, click here.

Use your CTA to lead your prospect to a landing page or a contact form. Get more information on who is reading your case study, and who is interested in your company.



Questions? Call us.

We're here to help. Call us and speak with an Inbound Marketing Specialist who will answer any questions you might have.

> 1-888-HUBSPOT (888-482-7768)



Request a demo.

One of our Inbound Marketing Specialists will show you how the HubSpot software can help you get more visits, leads, and customers.

Request a demo 🕨

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Start a free trial.

Give the HubSpot software a try by signing up for a 30-day free trial. You'll get a fully functional account. No credit card necessary.

Start a trial >

Thank-you for Reading.

Want to see how HubSpot's software shows the right case study to the relevent visitor on your website?

Get a Free Demo

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