



CASE STUDY TEMPLATE



[Title] Keep it to the point. For example: [client name] increases [thing they wanted to increase] by xx% using [the thing you did for them]

[Your client's logo goes here] If you have a picture of something related to their business it should go here too. Try to avoid stock photography. We've all seen too many high-fives from smiling people in suits...

[Client comment] Not the whole thing, but a 'pull quote'. In other words, the best bit from the fuller comment that features later in the case study. This adds third-party endorsement straight away. Pretty powerful. Keep this short – it can even be just part of one sentence.

[Key achievements/highlights] Some people will add an executive summary. That can be a bit boring. Instead, bullet point the hard-hitting facts here. These could indicate speed, obstacles that were overcome, evidence of going above and beyond. Aim for three to five bullet points.

[The problem] What was it you were asked to solve? This doesn't have to be a problem as such, it could be an outline of the brief you were given, the objectives you were set or the challenge your client was facing. Notice that it's about your client's situation though, and not yours. Here's where you set out the 'before we came along...' part of the story. Two to three paragraphs should do nicely.

[The solution] Describe the work. How did your service/product address the issues set out by 'the problem'? When you mention what you did, add a link to the relevant section of your website (product information, service overview and the like). Elaborate on the role that you or your team played in this, particularly if there were any interesting challenges or evidence of improvisation/innovation-on-the-fly. This can help other clients see how adaptable and capable you are.

[The results] What happened? Were any targets beaten? Any deadlines smashed? How did the work meet or exceed the objectives set out at the start? Use numbers and solid facts here. Lists are your friend. Your happy client's comment should appear here too, in full. You can also add a comment of your own if you like, but be careful not to sound too self-congratulatory or to just be complimenting your client on their foresight in choosing you...

General tips

- Avoid jargon at all costs. There are far too many 'leading solutions providers' out there. Don't be part of the problem.
- Use images – graphs, charts etc. – to show the results pre- and post- the work you carried out. Images can really hammer home the effectiveness of what you did for your client.
- If you're hosting the case study online (which you absolutely should...) then consider video too. Of course, the flashier something looks the more expensive it's likely to be. But a solid case study can help generate way more than it costs to make.