The Ten Common Pitfalls of Case Studies

How to ensure you have powerful case studies that raise your brand "stickiness"

Today's purchasing decision-makers are acutely skeptical of marketing. They can immediately sniff out the difference between fact-based, knowledge-focused information and the smooth sales pitch.

That's why case studies and magazines tend to be the first thing they'll pick up, at a sales meeting, at your booth, or from your website. These pieces promise real information that not only educates them on your product but on their industry.

Case studies are some of the most valuable tools you can have in your arsenal of marketing materials. And dollar for dollar, they are by far the most cost-efficient: because of their tremendous reach and value, case studies pay for themselves thousands of times over.

However, while most people recognize the enormous selling power of case studies, they don't always know how to go about getting one.

More than once, a client has told me that they're now on their third or fourth writer, and they're tired of having not only to spend more money, but precious time on what is turning into a frustrating experience.

And I don't blame them. I've seen a few doozies in my time.

If you want to avoid spending unnecessary time and money on your case studies, here are ten of the more common mistakes in case studies that you want to avoid.

Mistake #1: Make it really, really boring

Have you ever read this one?

> *Challenge:*
> *Company XYZ is a Texas-based software developer that creates hubs for connecting customer service agents with their consumers. They are creating some of the most innovative and responsive programs, delivering them with an eye toward convenience and accessibility.*

Your prospects have literally hundreds, sometimes thousands, of pages of documentation shoved at them when they go to trade shows, demonstrations, or even the Internet.

That means you have seconds, not minutes, to get to the point.

Your case study opener is the most important component of gaining and retaining attention, and setting your company apart from the noise. It is vital that your opener be lively, interesting, and compelling. In other words, it must make your reader want to keep reading.

Like this one:

> *Have you ever wondered why when you call Customer Service, you can't get a person on the phone anymore?*
>
> *That's exactly the challenge Company XYZ decided to address when it developed its ingenious relaying systems to customer service agents all over North America.*

Why case studies turn into boring stories
There are several reasons high tech companies sometimes find themselves with boring writing when it comes to marketing their product. Topmost is the "too many cooks" problem, where a marketing or product manager is trying to keep as many internal people happy as possible with the written piece that is going out to the public.

With too many contributors, and too many people trying to take control of your story, you often wind up with a piece that lacks focus and sticks to "safe" claims.

The bottom line is, if your case study is powerful, hits all the right points, and is really well written, everyone is happy (see what I have to say about the advantages of getting an outsourced writer to eliminate the "too many cooks" problem).

There's no reason a good writer can't make your marketing material engaging, particularly your case studies.

Another reason that case studies become boring is lack of good material. This is often a result of an insufficient interview (you'll learn more about this in Mistake #3: Fail to Ask the Right Questions During the Interview). Without some meat to fill out your case study, you're left with an empty shell of words that don't mean much in particular.

Write something engaging, and you've got your prospects reading to the end. Get them reading to the end, and you've just dramatically raised your brand's "stickiness". You stand apart as a company that promotes facts, not fluff, and as someone that your prospect can start building trust in.

Mistake #2: If you don't understand the technology, use jargon

This is the old standby of writers that struggle with subject material. "Seamlessly integrate with any application!" or "Providing the best in customer service!"

This kind of claim demonstrates two big problems: a lack of knowledge of what is going on in the industry and a lack of understanding of your key differentiators. Audiences today instantly recognize an exaggerated claim. As accurate as your claims may be, if they are insufficiently qualified, your reader will immediately associate a feeling of mistrust with your brand — which is deadly to your sales process.

It may very well be that superior integration capabilities or outstanding customer service are hallmarks of your offering. That's why proper understanding of just how they work as compared to the rest of the industry is critical to effective writing. These claims not only need to be worded properly, they need to be substantiated in a pithy, powerful way.

To do this, your writer has to be properly briefed on your product or service. But, your writer also has to know to ask the right questions. A good writer might even start to annoy you with all their questions — that means they are really digging down to get a good understanding of your offering.

Mistake #3: Fail to ask the right questions during the interview

The initial briefing is important to any writing task. Without it, a writer can't do a proper job. But the interview is where the real story comes out.

Many of your customers are reluctant to speak of the challenges of their business, particularly those that arose from their old systems. No one likes to badmouth anyone in public — it's poor form, and a perfectly legitimate concern.

However, without talking about the real challenges that an organization has to overcome (and how your organization helped them do that), you don't really have a story.

That's the job of a writer. To keep asking questions until they find the right way to articulate the challenge, all with diplomacy. The writer needs to keep probing, while also being respectful. In other words, a good writer is actually an excellent LISTENER. He or she will zero in on what might seem like an innocuous comment and turn it into a valuable testimonial.

According to veteran technology writer Gordon Graham, the job of a writer is "to come up with the drama."[1] While it may seem odd, that is indeed what makes a compelling case, and a success story that really grabs your readers' attention. A good case study shows, point by point, how challenges were identified and then overcome. That's what creates the drama of your story and what truly shows how your organization came through to solve a problem.

Mistake #4: Focus on features, not benefits

This is the opposite tendency of relying on jargon. In this case, a writer, often of technical background, will focus on the key features of your product.

There is no question that features are an integral part of your product. They are the main reason your customer will buy from you.

However, the writer's chief task is to show not only the features, but how those features will make your prospect's life easier. You're selling a better golf swing, not a bigger club.

In order to convince your audience that your product's features will make their work easier, their employees more productive, and their processes more efficient, you need to know:

1) What pains your customers are experiencing
2) How your features specifically address those pains

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[1] Graham, Gordon. "How to Tell Your Company's Story: Coaxing Prospects through the Sales Cycle with Powerful Case Studies." 16 November 2006. SoftwareCEO. CD-ROM.

It can get tricky sometimes: it's a fine line between a feature and a benefit, and as people become more familiar with technology, that line keeps changing. Most people today know, for example, that "word processing functions that resemble Word," translates into familiarity and ease-of-use for your end-users (i.e. you won't need to spell that out for them.)

On the other hand, most people today won't know how "an integration layer that makes integrating with in-house systems easy" translates into an immediate benefit. You'll have to spell out that they can automatically populate forms with key data from the ERP system or create mailing lists with a click of a button.

Mistake #5: Think of your audience as homogenous

Most high tech companies face the same problem in their marketing initiatives: they are addressing key stakeholders across an organization that have varying levels of understanding when it comes to technology.

Each stakeholder also has different priorities or concerns as they stop to ponder your offering.

IT personnel obviously know a lot about technology. You want to convince them by talking about the various technical aspects of your system.

The business process person, on the other hand, glazes over when you start talking about server requirements. Both people are important to address, and yet both seem at opposite ends of the technology spectrum.

In an ideal world, you can create separate marketing pieces that target your individual audience. In the real world, however, you have one, possibly two, opportunities to ask your client to speak publicly on your behalf.

Finding the right balance between talking about technology and talking about the business benefits is an art, not a science, and a true test of a high tech marketing writer. Any smart IT person is just as interested in the impact of a system or service as a whole on their company, and not just how the technology will fit into their current systems. Similarly, any business process person can appreciate some details of technology, as long as it's presented as part of a functioning whole.

It's a serious mistake to think that everyone in your audience is looking for the same thing. To address this challenge, one needs to write keeping these different perspectives in mind.

Mistake #6: Mis-time or miss completely a client case study opportunity

While this might seem obvious, it is positively shocking how many companies do this.

All that work put into a successful implementation, customer service request, or complete project, and then move on to the next project without proper, effective documentation. It's downright staggering!

Case studies are some of the most powerful, meaningful ways to engage your audience, and yet companies will often pass up this hard-won opportunity to really make themselves shine.

If you don't believe me, ask Janice King: "Case studies are a powerful marketing tool. They build credibility for a product by providing references and helping prospects understand how the product relates to their problems and circumstances."[2]

I'm not sure why this should happen on the scale that it does. My personal belief is that in today's fast-paced world, we have a tendency to turn our focus almost instantly to the next problem that lies ahead. Writing down the success of the project is one of those things that "will get done later".

There are many, many problems with putting off your case studies until later, and that's why it's critical to time your case studies well.

Too early means no meaningful data
If you attempt to interview your client too early in the process, as excited and pleased as they might be with you at the time, your case study will sound vague. Most of it will have to be written in future tense, and not much can be written about benefits, since none have officially been realized. You'll probably attain some good quotes saying nice things about you, but they will be vague and likely generic.

Worse still are the potential issues that arise at go-live. It's pretty well accepted now that issues at go-live are inevitable, and it's a matter of how you handle them, not that they happened in the first place. If you have interviewed your client prior to or too close to the time of these issues, there is a strong possibility you'll end up with a case study that your client won't approve or allow you to use.

While it is tempting to interview a client when they are really thrilled with what you've achieved prior to go-live, it is important to be patient and wait for actual results. Issues are an inevitable aspect of any IT project and almost never completely de-rail a project.

Too late means memories have faded
While it is certainly possible to do a case study any time in a client's lifecycle, oftentimes, waiting too long can have adverse affects.

The biggest bugbear in case studies is the high turnover in IT. A good case study tells a "before and after" story of an IT implementation, and if personnel have moved on, it's difficult to get a good grasp of the business challenges your IT offering was brought in to solve.

The ideal window of opportunity for your case study is 3-6 months following the go-live. At that time, you will get the most meaningful results to talk about in your case study, and usually, the most willing people to discuss them. The personnel who were part of the selection process (and thus understand best the reasons for choosing your system over the others) are usually still present, and are often the best users of your system.

Mistake #7: Wait for the perfect case study candidate

This mistake is similar to Mistake #5, but with a different flavor. In this situation, an organization typically does one or two case studies, then gives up.

[2] King, Janice, Writing High-Tech Copy that Sells (New York: John Wiley & Sons, 1995) 210.

Getting a case study opportunity takes tenacity and some measure of stubbornness. There is no perfect case study candidate, and if you wait until the perfect candidate appears, you may be in for a long one.

Why? Because it's just too easy for someone to say "no". They don't lose sales or customers by refusing your request. However, if they have longer vision, they will also see that helping you out with a case study benefits everyone: stronger publicity means increased sales, which means wider use, which means more investment in your product, which means more features and product longevity.

Some of the typical reasons I've heard for an inability to find case study opportunities are:

1) The client had issues and isn't happy
2) There was a change in personnel
3) The client is too small
4) The client doesn't do publicity
5) The client is not in the vertical I'm looking for
6) The client is not very articulate

In my experience, most companies underestimate just how successful their project has been. Yes, the client will be very vocal about the issues they're experiencing with you, and you may even have the impression that they aren't happy with you.

But just try asking. You might be surprised.

Attitudes often change once a person starts speaking with an outsourced writer. I frequently interview IT folks or business process personnel, people who aren't used to being interviewed. It's fun and exciting for them! A case study is an opportunity for a journalist to ask them for their expertise on a topic. Most people enjoy the chance to talk about something they're really good at.

Some companies flat out refuse to participate in all supplier publicity (Nike is one example). There's not much you can do about those.

That's why if you wait for the ideal client that is in the exact size and vertical you are targeting, on average you might find a case study candidate once every two years. Given all the variables of an implementation, to wait for the perfect candidate means dramatically limiting the number of client stories you'll produce. And that just makes your company look bad.

A good writer will be able to pull a good story out of just about anyone. It's a matter of asking the right questions during an interview, and making the most out of what's given to you.

Mistake #8: Make it really long and detailed

A case study is not a white paper. If you are looking for a more detailed discussion on an implementation, then a white paper may just be what you're looking for. A case study is a snapshot of a real-life example of your product or service in action.

The ideal case study length is 750 to 1000 words, or one two-sided, 8 ½ x 11 page. Any longer and you will most likely lose your reader's attention. When it comes to case studies, you want to keep them short and sweet and coming at a constant rate.

Mistake #9: Turn it into a marketing brochure

A good case study is essentially one customer talking to another. It's like having a reference on hand, without having to call someone up.

Your prospect wants to hear it straight from the horse's mouth, not from yours. That means you need a case study that quotes your client directly, and often. Again, writing quotes is a bit of an art: a good writer captures the speaker's tone, language, and meaning, without having to include all the pauses and disruptions that exist in spoken language.

Good quotes will turn your story into a veritable reference that has real value. It doesn't have to promote your product, because the speaker of the story — your client — is already doing that for you. And they're doing it by providing proof.

You can of course mention the product and its differentiating features. However, you want to avoid confusing it with a marketing brochure. Confusing the two will lessen the case study's credibility.

Mistake #10: Make someone register to see it

This is a personal pet peeve of mine. A case study is something you want as many people to see, and as many people to talk about, as possible. By making people register to see it, you're running the very high risk of it not being seen at all. You're only a mouse-click away from losing their attention!

If you really, really must try to increase your internal mailing list, and are using your case studies to achieve this, at the very least make your form mercifully short. Your prospects will thank you.

Find out more about effective case study creation and distribution

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