The 10 Biggest Mistakes Case Study Writers Make

Making Customers Look Bad, and Other Pitfalls

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The Credibility Crisis

The business world simply isn't what it used to be…

> Where once we conducted business face to face, now many businesses have never met most of their customers in person.
>
> Some once-prestigious global corporations have closed due to unethical business practices.
>
> The tech bubble burst in the early 2000s, taking down companies with promising products that just hadn't produced a profit yet.

Considering all that, buyers are understandably more cautious about the products and services they buy. They need more proof and more validation than ever before. Will the company be around next month to create new product releases and provide adequate product support?

Stories about true business successes (aka customer stories, case studies, or success stories) have become an essential part of today's marketing plan. Organizations need to document their successes, and need to do so in a way that's clear, compelling and effective.

Buyers need more proof and validation than ever before.

That's where you come in—the writer. Whether you write as an employee for your organization or work as a freelancer, your "client" looks to you to translate their successes into stories that resonate with readers and drive them to act.

For the past 10 years, I've written success stories and case studies for organizations. That's added up to more than 400 customer stories across a broad range of industries. I've learned, often through trial and error, how to create stories that support my clients' goals and objectives.

In delivering stories that truly accomplish the intended goal, you help your organization or clients land sales, win PR and increase their credibility in the marketplace. In turn, you increase your own value as an indispensable resource.

Customer Story Pitfalls

There are a number of possible pitfalls on the path to creating truly relevant and effective customer stories. Steer clear of these 10 common mistakes and you'll be well on your way to writing case studies that pull their weight for your organization or clients:

- Ignoring the Audience
- Eschewing the Subject Matter
- Skipping Interviews with Internal Folks
- Winging Customer Interviews
- Not Digging for Results Data
- Being too Formulaic
- Failing to Flesh Out an Angle
- Making Customers Look Bad
- Not Catering to Readers and Skimmers
- Being Dull…or too Enthusiastic!

#1 Ignoring the Audience

You have to aim in the right direction to hit your target. As with any marketing communications piece, a customer story has to match the audience or it won't do its job. The audience isn't simply "the decision-maker." Success stories are not one-size-fits-all. Different audiences want to see different types of information.

For example, an executive-level decision-maker usually prefers the big picture of benefits and results, without a lot of detail. How will the product or service impact the bottom line?

Meanwhile, managers or technical people that will have day-to-day interaction with the products or services need more extensive information about how those solutions work. How easy is it to use? How well is the product supported?

If you're writing for a nonprofit, major donors and supporters will want to see specific results, the level of impact you have in your area.

To start, ask your company or client contacts a few questions:

- How do you use your customer stories—with which decision-makers in which part of the sales cycle?
- Who's the audience for your stories–executives, managers or technical individuals, or all of the above?
- What messages do you most want to communicate to your decision-makers?

If you have multiple audiences, either create multiple stories, or one that gives each a little of what they need. Give executives a nice overview highlighted in a sidebar, with some detail in the body of the story for other readers. Then use white papers or other collateral to give those managers more detail about your solution in action.

Different audiences want to see different types of information.

Then, focus your questioning to gather the information that hits your target audience. That also means collecting results details that will resonate most with readers. Again, day-to-day users will look for different types of metrics than executives.

And, as much as possible, feature customers that are similar to the intended audience. People and organizations want to know what people and organizations just like them are doing.

#2 Eschewing the Subject Matter

Too often, marketing writers—especially on a tight deadline—jump into a project without stopping to learn about the featured solutions or what's important to highlight in the stories. It's critically important to take the time to do this homework.

To interview and write effectively, you first have to understand what you're writing about and why it matters. And of course, you want to sound intelligent when talking to featured customers.

Always study products and services thoroughly.

Before interviewing customers, study products and services:

- Always begin with a complete and thorough review of the products or services that will be featured. Read Web sites, brochures, data sheets, white papers and existing customer stories, and even watch demos if they are available.

- Study how the organization talks about its own solutions, such as the terms and industry jargon used.

- Ask questions. If anything doesn't make sense to you, ask your contacts to explain further. Don't be shy. Your customers should understand that this will result in better customer stories.

- Know when technical knowledge is actually needed. Even in technology case studies, your audience may be most interested in the benefits of the technology, rather than exactly how it works. I usually don't need to understand the bits and bytes behind software to be able to write a great customer story. It's more about knowing the functionality of a product or service and focusing on benefits.

When you know your stuff, you can create a solid set of interview questions and talk easily about solutions in customer interviews.

#3 Skipping Interviews with Internal Folks

Customers, like all of us, are busy. They expect that you'll be as efficient as possible when interviewing them. In fact, they might even be annoyed if you call without any background on them.

It's important to learn as much as you can about the customer's specific situation and history with the vendor company *before* the call.

Sometimes that means being persistent in gathering background from internal contacts. Busy sales and account managers, or reseller partners, would love to hand you a name and phone number and tell you to run with it. But take a step back and have at least a short conversation with someone close to the customer's situation. If you can't get that, settle for a descriptive email.

Going into interviews with that customer's back story impacts the quality of the case study:

- You sound more intelligent to customers
- You respect customers' time
- You can craft more specific and relevant interview questions
- You have a better sense of what angle to focus on

So, wrangle an internal contact or two and get some key pieces of information before you ever talk to the customer. These will vary depending on the subject matter.

- How long has the organization been a customer?
- Which products or services has the customer used?
- What were some of the issues or pains the customer needed to solve?
- Was a consulting services team or reseller partner involved in the delivery or implementation?
- What are 2-3 highlights of the customer's experience?
- Is there anything that's potentially measurable about the benefits the customer has seen?
- What angle in this story would best support your sales and marketing needs?

Get the basics about the customer before talking to the customer.

Often internal contacts will share other valuable insight with you, such as topics to stay away from on the call. The customer may be exceptionally happy now, although it experienced a very rocky start to the relationship or a bad support experience.

I've had internal contacts offer other good tips, such as good times to try to reach the customer, or that the customer only answers her cell phone. They may also let you know about secondary customer contacts that could provide quotes to enhance the story.

All of this type of detail will make for better interaction with customers, and richer stories.

#4 Winging Customer Interviews

Seasoned writers, especially former journalists, are accustomed to questioning on the fly. Stories are breaking and deadlines are looming, so there's little time to get really formal about your interview questions.

But with customer success stories and case studies, you need to be more formalized with interview questions.

Here's why. For about 10 percent of the customer stories I write and manage, customers ask to see the interview questions *before* the interview. If they do, by all means, send them the questions. There's nothing better than a prepared customer, especially if you're trying to get measurable results.

There may also be times when someone else at your organization, or at your client company, ends up interviewing the customer for various reasons. Maybe you have another call or meeting at exactly the same time that another customer is available before going out of town for two weeks.

Write out questions before the customer interview.

When any of these situations arise, you'll appreciate having interview questions written out and saved in a file. Create them for all the products and services you might interview on. You can always customize that basic set of questions for each call.

Then you can simply email them off to customers or other contacts. Other internal contacts may also have input on your questions to help enhance them.

Sitting down and writing out your questions also ensures that you are (a) thorough, (b) consistent on each call, (c) and touch on the key points that are important to all stakeholders.

If you're a freelancer, you'll also appreciate having that set of questions saved. When working with multiple clients, you may be bouncing back and forth between different interviews, across totally different products and services, in a single day. You'll be glad that your questions are ready to go, allowing you to minimize prep time between projects.

#5 Not Digging for Results Data

Nearly every organization that creates success stories and case studies wants specific, measurable results. It's the Holy Grail of the customer story–return on investment numbers, payback period times, or other relevant metrics. Decision-makers likewise love this kind of detail in a story.

But many writers are not accustomed to drawing out this type of information from interview subjects. Doing so usually requires some polite persistence as you draw it out of customers.

Here are a few steps to help you get the best details from customers:

- ***First, ask internal contacts what's measurable* –** As you create interview questions for products and services, find out from internal contacts what aspects of a customer's experience might be measurable. Sales or product managers usually know.

- ***Include before-and-after questions* –** Craft your questions such that you learn "before" numbers on costs, time involved, number of times a network failed per month, or whatever is relevant to the featured products and services. Then create corresponding "after" questions to get the changes the customer has seen. It's a simple way to help customers measure results, instead of just asking, "How much time are you saving?"

- ***Show ROI or payback period, if possible* –** Ideally, you can show the return on investment (ROI) of the featured solutions or the payback period, the amount of time it took for the customer to recover the initial cost of the investment. Mainstay Partners (www.mainstaypartners.net), an independent third party that helps companies capture the value of technology investments, defines ROI and payback period in the following ways:

Before-and-after questioning helps customers measure results.

ROI—The net benefits captured divided by the initial investment expressed as a percentage (*always* represented as a percentage). If the solution costs $5,000 and the company ultimately saves one full-time position at $35,000 per year, then that's an ROI of 700 percent, for example.

Payback period—The amount of time necessary to recoup the initial investment, represented in months. Again, if the solution costs $5,000 and the company saves $35,000 per year ($2,916/mo.), then it takes less than two months to make up the initial cost.

Try not to try the patience of interview subjects. If they really can't remember or measure something, then don't push them. Also, some solutions lend themselves more readily to measurable results than others. Pursue quantitative results, knowing you may have to settle for qualitative at times.

#6 Being too Formulaic

Customer stories tend to follow a specific storyline: someone has a need or problem, a solution is introduced to solve the problem, and the individual or organization is better off in the end. But too many stories follow a formulaic approach, putting the information in blocks of text labeled something like, “The Customer,” “The Challenge,” “The Solution,” The Results.”

There’s nothing wrong with this format. But the most interesting stories usually take a more creative path.

Here are a few story options that differ from the traditional format. Consider your audience and whether one of these might be effective:

The most interesting stories don’t follow a formula.

Feature-Story Format – A feature story format doesn’t group text into blocks with the standard headings above. Instead, it employs journalism techniques such as a strong lead sentence or opening paragraph, and descriptive subheads as it moves along–like what you’d see in a magazine article. This draws readers in from the start and allows them to gather more of the story from the headline and subheads than in a traditional format. Because stories are written more like journalism pieces, they may more effectively catch the attention of editors at your targeted publications.

First or Second Person – Some organizations or consultants choose to present stories in the voice of the customer, speaking in either first or second person, in “I” or “we” terms. This can be very effective with some audiences, and easier for some companies to manage. You see this most often in cases where individuals or consumers are the audience, rather than businesses.

In producing first-person customer stories, you can interview customers and write the story from their perspectives. Or, you can create a list of questions that you give to customers to answer in the story, and some guidelines on length, and let them write the story. Then edit the story for space or clarity. However, a story that focuses on a person rather than a company may have a shorter potential shelf-life, since people change employers.

Q & A – Question and Answer is another format you see used in journalism. Like a first- or second-person account, it is more personal and focuses on an individual. This often works best with serious technology audiences that tend to be distrustful of anyone but their peers. Usually this is a fairly simple, casual, and lower-maintenance format for presenting stories. Because this format publishes questions and then customers’ answers basically verbatim, with perhaps a small amount of editing, less actual writing is required. Writers can use their interviewing and editing skills instead.

The drawback in running customers’ comments nearly verbatim is that you’re somewhat limited to customers’ actual comments, which may not be as organized or compelling as the paraphrasing and presentation of a professionally written story.

Think about the personality of your audience and what would resonate most with them.

#7 Failing to Flesh Out an Angle

A story is all about the angle, what you choose to focus on. It's what makes each story unique. If every customer success story or case study sounds exactly the same, then it won't support sales, marketing and PR objectives as effectively.

Customers have different needs and challenges, buy products and services for various reasons, and use those solutions in differing ways. The best stories identify each customer's unique situation and then detail how the solution helped them arrive at positive results.

Ideally, when a sales rep comes across a prospect with needs and challenges similar to those of a previous customer, the rep should be able to pull out a customer story that speaks to how another customer met those same objectives with the solution.

A story should emphasize one or two main benefits or themes.

As an example, for a single piece of software for which I write case studies, I can choose a variety of angles: enhanced security, operational efficiency, compliance, change management or simplifying audits. For each, my client requests that I identify, in the interview, which one or two themes are most important to the customer and then focus on those. It doesn't mean that the customer story won't also talk about other benefits, but it should emphasize one or two main angles or themes—making it easier for my client to identify and pull out a story with the right angle for a particular prospect.

Ways to find your angle:

1. Before you start any story, have a good idea of the vendor company's objectives for customer stories. Maybe you already know what themes the company wants to play up.

2. Talk with internal contacts such as sales or account reps, professional services consultants, or reseller partners to collect background on the customer. Find out how the customer uses the products or services, how service delivery/implementation has gone, and any highlights of the customer's experience. Also ask what angles might be most beneficial to the sales rep's efforts.

3. The customer interview is where angles become clear. Maybe it's not what you expected at all. Listen to the customer and learn what was most valuable and beneficial regarding the product or service. You may know the angle you want to pursue at the outset of the interview, but when you get on the call, there isn't enough "meat" to support that original angle or the customer may not want to tell the same story you do. You have to balance the customer's actual experience, and what contacts are willing to discuss, with your own story needs.

Feature your chosen angle prominently in the headline, in any sidebar highlight content and throughout the story, with secondary angles showing additional benefits.

#8 Making Customers Look Bad

Customer stories innately have a "before-and-after" format. They identify the needs and challenges the customer wanted to address, and then how the solution brought about a successful outcome.

It's natural to mention some of the pains or problems the customer experienced before. But in a story showcasing a customer's success, too many negative details can make your customer look bad. When presented a story that seems to indicate the company was a mess before the solution was introduced, many organizations will edit out those negative parts or deny approval of the story altogether.

If the story doesn't show the customer positively, they may not approve it.

For customers, positive public relations is one of the benefits of participating in a customer story. If the story doesn't put them in a good light, then there's little reason to participate.

As a writer, it's your job to help craft a story that will benefit both the vendor and the featured customer. Sometimes it's a matter of translating the information that customers give you in a way that shows the need for the solution, but doesn't reveal too much.

Here's an example:
I've written a number of stories where a solution helps a customer achieve better regulatory compliance. It's one thing to say that your customer had 20 regulatory violations per year prior to your products or services, and now has 5 regulatory violations. It sounds much better to say that the customer improved regulatory compliance by 75 percent, without mentioning how many violations the customer had previously.

The same goes for a solution like contact center software. The company may not want to go on record saying that it had X amount of callers dropping off the line before talking to a rep. But it might say that drop rates improved by 80 percent.

Once you have before-and-after numbers, negotiate with customers regarding the best way to present measurable results so that they are comfortable, but you also show solid benefits.

#9 Not Catering to Readers and Skimmers

There are two types of audiences: readers and skimmers. Some buyers will read every word of your story, while some will look to headlines, subheads, pull quotes, and sidebar summaries for the main ideas and skip the details.

Always try to write customer stories for both audiences. Build in ways for skimmers to glean the main points of the story without reading it word-for-word.

The key pieces of your skimmable document:

The headline – Include the number one idea you want to reinforce.

Subheads – Tell the main points of your story in subheads throughout.

Pull quote – Preferably a highlighted quote (pulled out and enlarged in the final designed format) that reinforces the main benefit.

Some readers only scan headings and call-out information.

Sidebar summary – Summarize key points in a sidebar. What you choose to feature in a sidebar completely depends on the featured solutions. It's nice to show a short summary of who the customer is, like industry and number of employees, and then highlights of the customer's needs and results related to your solutions. If customers read nothing else, they know the customer is in their industry and what the business achieved.

As a writer, indicate in your draft the sidebar content and a suggested "pull quote" or two. That helps internal reviewers, customer reviewers, and the designer understand how the story should look when complete.

#10 Being Dull…or too Enthusiastic!

Tone is hugely important in any story. If a customer story strikes the wrong tone, you risk turning off your audience. In customer success stories and case studies, writers go both directions: too impersonal and dry, or too friendly and enthusiastic.

First, what exactly is tone? Scott Ober's *Contemporary Business Communication* provides a nice definition (p. 88):

Tone depends on the audience and the featured solutions.

"Tone in writing refers to the writer's attitude toward the reader and the subject of the message. The overall tone of a written message affects the reader just as one's tone of voice affects the listener in everyday exchanges."

The right tone for a customer story depends on the audience and what you're selling. If you're selling diet products or online dating services to consumers, then heavy emotion, casual writing and enthusiasm can be the right fit.

In business-to-business communications, the tone should be considerably more professional. You can still maintain a friendly style, but you'll lose business decision-makers with writing that is overly enthusiastic (with lots of exclamation points!). Be careful of this, even when the customer you're interviewing is extremely excited about the solution. Very rarely have I seen an exclamation point work well in a B2B customer story, even if it's a direct customer quote.

In customer stories for technology products, also be wary of being too dull. You are writing about technical subject matter, but in a marketing document, you also want to engage the reader. And just because it's a technical product doesn't mean your case study should be super technical. The main users and decision-makers may be non-technical people.

When choosing your tone, ask yourself the following:

- What's the purpose of this story?
- Who is the audience and what do I want them to understand?
- What tone will best resonate with this type audience?

This goes back to the #1 rule: pay attention to your audience when settling on your tone.

Casey Hibbard

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The *Compelling Cases Tip of the Month* delivers a quick, bite-size tip on leveraging customer stories.

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Subscribe to the blog, the monthly e-tip, or find more articles and resources at www.compelling-cases.com.