



## ••• Facet5 Marketing Case Studies: Process and Format

We've identified case studies as a key to growing sales internationally: we committed to making progress in Barcelona. I've drawn on my experience with a number of clients to suggest a system which will build up the volume quickly. But many of you will have expertise in this area so you may have improvements, changes or corrections. Once I have your comments and an agreement I'll distribute a corrected version and get this going.

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## AIM

To develop and constantly refresh a centrally held library of international FACET5 case studies which can be used by all members of the Facet5 partner network in sales, marketing, pr and other activities.

## SUMMARY

1. Individual partner will write case studies for their own use. There seems to be agreement that we also need a central library of these for use throughout the partner network. Consulting Tools will take responsibility for setting this up and running the system. However, this depends on ALL partners providing raw material for the system regularly, something that has not been happening despite earlier requests..
2. These will be Facet5 branded so that they can be used by all partners. They will mention and acknowledge their source and the company whose work they're based on.
3. CTL will use a rolling selection on their central public web site, and make the on-line library available to all Facet 5 partners for translation and use internationally.
4. CTL can take local partners' own written case studies and adapt them for network use or, in the first period, write them for partners, based on partners notes and background information, initially setting up the style, model and quality standards for organisations less experienced in this area to take over ( see below).

## WHAT ARE CASE STUDIES AND WHAT DO THEY AIM TO DO

Put simply, they're descriptions of an applied project, usually structured as a story. They are not direct sales brochures, describing benefits and features or hard information on pricing etc. Sales brochures show products and services in the abstract; case studies contextualise them. They therefore:

- help clients 'translate' abstract products or services to their situation and issues;
- show how products / services drive business benefits;
- focus on action rather than description;
- if the client is quoted in the case study, it provides third party, therefore more trustworthy, evidence that a product or service works.
- As Anna points out it can be very useful to write a whole case study from a client's point of view. t-three have used this technique.
- by quoting staff of the company creating the case study, it can increase their personal profiles.

- provide collateral for web sites, mailings, blogs and, in really strong cases PR (where journalists, who deal in stories, often ask for 'real' case studies ). This can sometimes work as a partnership between client and service / product provider who both get media coverage.
- have a 'training'/learning function' introducing new tips and ideas for using a product/service: the ' Oh I hadn't thought of that' effect.

## FORMATS

Case studies can describe a piece of work done by a partner consulting with a client, or can describe the work of a trained client working internally with a product or service.

The base form of a case study is a structured 3 or 4 act story ( in many ways like a detective story with a problem to be solved ): setting up an issue to be solved; describing how it was addressed; showing the outcomes and sometimes suggesting what could be further addressed. It is often followed by a bullet point list highlighting key learning points. Their form is defined by the fact that stories are the basic way of 'winning peoples' assent and moving them to action, engaging emotion as well as intellect. In this they are more effective than abstract arguments for a number of cognitive and evolutionary reasons( as recent leadership theory has shown ).

Headings for a case study should concentrate on the positive outcomes not the question posed. 'Improving talent retention by 22% in an IT company' not 'Designing a talent retention programme.'

Case studies tend to come in two lengths : very short 1 page versions and ones which run to 2 or 3 pages at most. On the whole the one page versions can't get the detail which is part of case studies' strength. 3 pages is probably too long. We therefore propose 2 pages as the ideal.

People should be quoted in a case study ( as in a press release) . So the sponsor of a project, the relevant manager(s), some staff, the consultant and an expert in the supplying company are all possible 'quotees'. This is a central part of the strength of case studies: that the comments are made by individuals, including third parties, rather claims made by a faceless organisation.

Case studies should give vivid detail where possible: giving the precise amount of money that was saved, the specific reduction in staff turnover rather than general comments about improvement.

Case studies work infinitely better if the client company is named. This is not always possible and often involves delays in getting client senior management sign off. If this is not possible, a generic term 'A Major Automotive Manufacturer' can be used. But this is always second best.

We propose producing two types of marketing case study:

- a 2 page story-based description of a particular project. This will include the story under headings: a bullet point summary; a boxed description of the client. Prime branding would be FACET5. We'd also want to include the client companies logo and the logo of the partner who managed the work. But Facet5 would be the overall branding, making each useable throughout the network. Good case studies tend to be simply designed to make it easy to find relevant information and may include a photograph or image but only where this adds to the message, rather than serving as visual padding. One idea would be to include the life cycle diagram on each case study, highlighting the area in the life cycle that that case study addresses. We could use the colour associated with the specific module used in the project, as the predominant colour in the design of that case study, tying in with branding.
- shorter bullet point sector summaries listing main issues from a number of cases in a particular sector. This builds on Jeff's practice in Felix and a suggestion by Richard Flower at CTL on what would be most useful in selling. The idea here is that we would be able to list brief outcomes from a variety of projects in a specific sector, badged by clients' logos, creating an impressive calling card when talking to a new client in that sector.

Case studies can also be created as an INTERVIEW film, following the same sort of flow as a written case study but created using filmed interviews with key people. These can then be used on web sites, YOUTUBE etc. This can be more powerful than simple filmed testimonials but needs more planning and organisation. Nonetheless we should experiment with this format.

## Process

There's no one way to go about writing case studies and some of you will have your own methods. These are just some tips from my experience.

- It's important to let the client know as early as possible that a case study is intended; it enables you to plan interviews, allow your contact to get permission for this to happen and even to engage the client in mutual exploitation of the study. Many clients see stories of good HR practice as very useful to them in employment strategies and HR managers and consultants use them to promote their work. But obviously when they're first discussed is a matter for individual decisions depending on relationships with individual clients.
- Consultants, key account or sales managers should keep an informal record of the project quite apart from any formal project planning.
- It's sometimes possible to get key client managers to keep a similar record.

- In the best of all possible worlds, case studies drive good practice. In order to get precise outcomes its necessary to measure them in a stringent way and this requirement might suggest an additional evaluation stage to a project.
- Interviews by the writer with key people involved once the project is finished is the key means of getting good material for case studies. In this they are more like journalism than advertising copy writing.
- In scheduling these its important to make allowance at the end for client approval. This ALWAYS takes longer than you or they expect.

We could operate our system as follows:

- Partners could send CTL base notes and information, a rough case study draft or a finished case study in the Facet5 format.
- In certain cases it might be possible to combine a business meeting between CTL and a partner with a CTL staff member doing interviews and writing case studies from scratch – if the partner felt this was a useful process.
- CTL to write, edit, amend and send back to relevant partner for approval
- Once approved the case study would be added to the library

One important point: obviously partners will want to create case studies in their own languages. CTL will create standard case studies in English for partners to translate and adapt. We'll need to discuss translation issues in the creation of these standard cases: if notes, or draft studies to be sent CTL are in a non-English language.

## SAMPLE

1. I've taken an existing CONSULTING TOOLS case study ( this was the most developed I had so it was easiest to work with it) and invented a new one., oosly based on it along the lines I've suggested.

Don't get too hung up on the details per se. I'm trying to model what a case study might look like.

We've also done some initial work on designing it in-house to reflect brand guidelines and design needs but, one we have an agreed format, we'll get a professionally designed template.

2. I'll leave the SECTOR summary till we have some concrete studies.