

Customer case study guide

Do you have partners who are willing to provide data, feedback and lessons learned?

What is this tool?

This guide will help you write a clearly structured story that showcases how your technology solution helped customers solve a problem and ultimately helped them achieve their business goals.¹



Note

Customer case studies can be an important communication tool.

Case studies can demonstrate that you:

- are comfortable in an industry
- understand an industry's specific needs and problems
- know how to deliver targeted results for a customer.

Why use this tool?

Creating a good customer case study has a number of benefits, including:²

- **Showcasing results** you achieved for a specific customer, by sharing the story of how you helped them solve a problem. A good case study demonstrates the type of value you provide, as well as the customer's happy ending.
- **Building trust with potential customers.** A good case study can help convince potential customers by showing them exactly how you have helped other people just like them. This helps you build trust with existing and future customers as you demonstrate your expertise.
- **Connecting with potential customers.** Writing a case study that includes solutions to real life problems will show that you understand customers and end users, and that you have the capability to help them.
- **Showcasing your points of difference from other technology solutions (i.e. competitive advantage).** Good case studies are not only about your technology solution; they allow you to explain why your solution is better than others and its beneficial impacts.
- **Building legitimacy.** Case studies can help you build authority as it uses real data and real-life results.

¹ Hall, H.S. 2019. *How to Write an Epic Case Study that Wins More Business*. December 30, 2019 <https://optimmonster.com/how-to-write-an-epic-case-study-that-wins-more-business/>

² Pattel, N. 2021. *8 Tips For Creating a More Effective Case Study – With Examples*. <https://neilpatel.com/blog/creating-a-great-case-study/>

Tool

This tool has two parts:

- steps to guide you through the process
- references for examples of different formats.



Tip

When looking for a customer to showcase in your case study, think about:

- who can show measurable results from using your technology solution
- who is happy and satisfied with the results of your commercialisation
- how a customer case study could be beneficial for both you and the customer.



Tip

Ensure you have permission from your customer to use the information collected.

Although real numbers are better than general statements, it is important to respect confidentiality.



Tip

Interviews allow you to ask open-ended questions. This lets the customer tell their story in their own words, and you can capture useful and relevant quotes.

Steps to writing a customer case study



Step 1. Select a willing customer

Review your list of current customers to identify organisations that have used your technology solution.

Once you have identified at least one potential customer, ask if they might be willing to help create a case study.

If they agree, proceed to Step 2. If not, return to your list of customers and try again.



Step 2. Collecting data to build your story

In most cases, you will need to work with your customer to identify the key points for inclusion in the case study and the supporting evidence for these points.

Where possible, a mix of qualitative and quantitative data is best for telling an interesting story.

Questions to consider:

- Who is the customer and what do they do?
- What was the problem you solved for them?
- Why was it important?
- How did your collaboration or technology solution benefit the customer?
- If and how, has their organisation changed?
- How did your collaboration or technology solution create wider impact for society or the environment?



Tip

The simplest way to tell a case study is from beginning to end (or start to finish), describing the problem, solution and benefits.



Tip

This primary focus of a customer case study should be the benefits realised by a customer using your technology solution in their business.

It should focus on your customer's experience, and how it helped them improve their business/life and better position them for the future.



Step 3. Structuring your story

All stories have a beginning, middle and end. Knowing what to include in each part is an important step in developing a customer case study.

Some questions could include:³

Beginning: The challenge

- What was the main issue/challenge you were experiencing that led you to work with our research institution/team?
- What made you decide to work with us?

Middle: The partnership process

- Describe the process of working together.
- What were the highlights of working with us?
- Were there any pleasant surprises you experienced during the process?

End: Results and overall impressions

- What were the results (include a general discussion as well as specific metrics)?
- Did these results solve your initial challenge?
- How did working with our research institution/team change and improve your business?
- Would you work with us again and why?
- What would you tell others about us if they have never heard of us before?
- What makes our research institution/team different from others?
- Has working with us created additional social and environmental benefits for your company, wider society or the environment?

³ Questions adapted from: Turgeon, V. 2018. Case Study Template: How to Share Your Company's Success & Win Business. July 12, 2018. <https://www.brandpoint.com/blog/case-study-template/>



Tip

Introduce the customer and the problem you were solving together early.



Tip

If you do a written case study, keep in mind that a reader should be able scan the document and know what you could do for them.

Formatting elements such as the following can help:

- Headings: these should be striking and catchy, as well as summarise what you achieved.
- Images: use these as much as possible, including photos and infographics. Having visual evidence of your technology solution can also increase your credibility.
- Bullet key points: these allow readers to scan and quickly understand the main points.
- Use bold and italicised text for different messages.



Step 4. Presenting your story

There is no right or wrong way to present a customer case study. It can be in writing or video or a combination of both.

The goal is to keep your case study simple and easy to follow.

Quotes from your customer or end user can make the case study more relatable and accessible. Where possible, add graphics and infographics as these can be helpful aides.



Step 5. Finalising the case study

Once the case study is finished and you are happy with it, share it with your customer for review.

If they request changes, incorporate as many as possible and discuss any you do not agree with.

Once you have final approval from the customer and you can publish the case study.

Discuss the best strategy for sharing the case study with potential customers with your Technology Transfer Office and/or other communication officers in your university.

Style tips

- Avoid jargon, buzzwords and highly technical language.
- Balance text with subheadings and images.
- Use visual aides to support the key messages of the story.
- Write in short paragraphs.
- Include an 'About your organisation' section, including easy ways for people to contact you.



Note

Don't forget that case studies need to be updated regularly to avoid becoming stale.



Tip

Think about the format for your case study.

A web version, for example, allows you to include multiple formats, such as a written overview and infographics as well as videos or a podcast from a customer interview.



Step 6. Sharing your case study

Once the case study has been agreed and finalised with your customer, don't forget to promote it.

Social media (such as Facebook, YouTube, etc.) can be an effective way to for both you and your customer to share your story with others.

Examples of customer case studies

For your reference, below are three examples of customer case studies. These case studies have a clear format and message and are visually appealing.

- CSIRO Food Innovation Centre Customer Success Stories: <https://www.csiro.au/en/work-with-us/industries/food/Success-stories>
- Microsoft Customer Stories: <https://customers.microsoft.com/en-gb/home?sq=&ff=&p=0>
- Royal Melbourne Institute of Technology (RMIT): <https://memko.com.au/customer-case-study-rmit/>