ClearVoice
a fiverr company.

How To Create a B2B Case Study in 3 Phases

Case studies are proof that your product or service works, especially in today's "prove it" society.

According to Big Commerce, 72% of consumers say positive testimonials and reviews increase their trust in a business. And Demand Gen Report found that 97% of B2B customers cited testimonials and peer recommendations as the most reliable type of content.

There are three main elements to case studies: **Challenge, Solution, and Results**

Case studies are a middle and bottom-of-the-funnel content type. Case studies can help convert your lead during the decision-making stage.

We've broken down the case study creation process into three phases.

- **Phase 1:** You will identify your customer, identify your stakeholders, create a questionnaire, and outline timelines and tasks.
- **Phase 2:** Write the case study.
- **Phase 3:** How and where to promote your case study.

Let's Get Started!

Phase 1: Prep

Step 1. Decide the customer story

Answer these two questions:

What are your prospects struggling with? What are their common pain points?

Compare that with your most successful customer relationships. Whom did you recently help?

Keep in mind: Your case study will be most effective if you identify the customer you helped.

Step 2. Gather your stakeholders

How many people you need to pull into your case study depends on the size and mechanics of your company. If you're a one-person show and this is all on you, then advance to the next step. If you work in a larger operation, you'll need input from:

The customer's main point of contact at your company: ______

Others who serviced the account: ______

A data analyst or the person who handles metrics for the customer: ______

The customer and their stakeholders: ______

C-suite executives* from both sides who have positive things to say: ______

**These job titles may look different at your company. Tailor this step for what makes sense for you.*

Step 3. Create a questionnaire

Use our questionnaire to guide a real-life conversation or distribute it via email. Additionally, it serves as a case study outline. You can use our checklist for your interview. Be sure to record your answers in a word document or notebook.

Ask the customer

- [ ] What business challenge were you experiencing?
- [ ] Have you tried to solve this problem before, and what were the results?
- [ ] How did we stand out from our competitors?
- [ ] What solution(s) did we offer?
- [ ] How was the implementation phase of our product or service?
- [ ] How has our product or service helped your business?
- [ ] Did we meet your expectations?
- [ ] Demonstrate success with key performance indicators (KPIs)

Ask the team

- [ ] What were your initial thoughts when you first talked to the customer and heard their challenge?
- [ ] What solution did we offer?
- [ ] What were your goals with our solution?
- [ ] How did the implementation phase of our product or service go?
- [ ] Did we meet the customer's expectations?
- [ ] How has our product or service helped this customer?
- [ ] Demonstrate success with key performance indicators (KPIs)
- [ ] Are there any quotes that stand out you want to highlight?

Step 4. Set tasks and timelines

Send out your questionnaire and/or schedule your meeting to discuss the above. Make sure everyone knows what they're tasked with and their due dates.

Once you've received everyone's input, it's time to move to Phase 2.

Phase 2: Write

Case studies all follow this basic format:

- **Challenge** - What challenges did the customer encounter before using your product or services?
- **Solution** - What did your company do to provide a solution to this challenge?
- **Results** - What were the results?

Using this simple formula can help guide the work and help create compelling stories that demonstrate how your products or services have helped businesses succeed.

1. Introduce the customer

Give some background about their situation. Who are they? What do they do? Where are they located?

2. Present their challenge

Detail the customer's problem before using your product or service. What goals were they trying to achieve, and what was standing in their way?

3. Share your solution

Share how your product or solution helped solve the customer's problem. Explain why the customer chose you and how business improved for them. Stay focused on the customer and their success.

4. Show results

Show how your solution led to tangible results. Provide real data and metrics.

5. Include quotes and visuals

Graphs, charts, and individual data points make for good custom graphics that can liven up your case study. Think about which data points would make for good custom graphics.

6. Don't forget the call-to-action

Seeing as case studies are usually consumed middle-of-funnel or bottom-of-funnel in the customer journey, go with a CTA that's appropriate for that stage. Here are a few examples of CTAs, or write your own:

- Start your free trial
- Book a demo
- Talk to us
- Get started
- ______________________
- ______________________
- ______________________

7. Send your case study for review

Once you've written and edited your first draft, it's time to send your draft to the stakeholders for review. Make sure all stakeholders have the opportunity to add comments within the document. Remember, it's not unusual for several rounds of edits before the final draft is complete.

Phase 3: Promote

Promote the case study on your site or blog

If you don't have a dedicated case studies page on your site, consider adding one. Seasoned B2B buyers know to head straight there for real use cases.

Pull some of the quotes from the case study and sprinkle them throughout your site, especially on relevant product pages. These serve as testimonials. Design them into quote cards, and you can post them on social (if you don't have a graphic designer, try a tool like Canva or Snappa to create these yourself).

Include your case study in a relevant email campaign

Case studies are excellent content for an email nurture campaign and a good way to reconnect with a prospect who has gone cold.

Make sure your sales team has a copy

We've never met a sales team that didn't love a good case study. Your sales team can use these customer stories and case studies as sales collateral.

Include them in pitches and proposals

Always include at least one relevant case study with your pitches, proposals, follow-up sales emails, etc. Your case study is social proof as potential customers continue to hear pitches.

Share on social media

Promote your case study on your blog and on your social channels. To better resonate with your target audience, make sure to call out the common pain point and the solution in your leads and posts. Tag your customer and link back to the case study.

Don't forget to follow your social channels closely after you post. The more chatter your post gets, the better visibility it receives. Follow @clearvoice on social for inspiration.

You did it!

You've now created a winning case study, don't forget to share and promote it!

You need content for all stages of your sales funnel. Content at the top of the funnel, such as articles and infographics, is ideal for building brand awareness. Content needs to drive potential customers down the funnel and eventually convert them. That's why case studies are perfect for potential customers at the decision-making stage or bottom-of-the-funnel. These studies demonstrate the value of your product or service and showcase your company as an innovator and problem-solver and act as social proof.

Need help creating your customer story or case study? ClearVoice can help!

Our network of freelance and in-house creators, producers, and managing editors creates premium customer stories and case studies to help your customers make a purchase decision. Our editorial team ensures the delivery of brand-aligned, grammatically correct, plagiarism-free, fact-checked, and SEO-friendly content.

Talk to a Content Specialist: **sales@clearvoice.com**