How to Write B2B Case Studies

B2B case studies are powerful lead generating assets…as long as you do them right. Here's how you can do this well,

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This blog is part of an extensive series on B2B lead generation and revenue growth (and salary growth - the thing that really matters to you).

If you want to be thorough, you should start with:

- This blog about unique selling propositions.
- This blog about permission assets (which is what your case study is).

And if you're not totally sold on creating a B2B case study as your lead magnet, you can also read about thought leadership here or buying guides here. Both are valuable assets for the niche you work in.

If you're sold already on the case study, great! It's also one of the three lead magnet types we recommend. And we're going to teach you exactly how to create it now.

Or, if you want it done for you, contact us here. It's the easiest way to get this done without taking on any extra work, and the leads you get will be worth 5x what you pay getting it done.

In the previous blogs you might have read, we outline how people in different roles in your business can get the thought leadership permission asset or buying guide permission asset made.

There's a method for directors, owners, and others managing staff at a high level. We call these people Conductors.

There's a method for sales professionals and others who might be interested in creating a permission asset to help with their main job role. Making this kind of content isn't their primary responsibility, so it's done quickly, off the side of their desk. We call these people Curators.

And there's a method for the marketing manager or marketing generalist or content writer. We call these people Creators.

For your case study, there are no different methods for different job roles. We don't recommend anyone other than Creators (marketing people) make a case study.

Everything you read in this blog is strictly for marketing professionals creating case studies as lead generating assets. Why? Because it involves time spent talking with customers and thinking deeply about the best angles to take. That's best suited for a Creator with time to spend on it, not Conductors or Curators with other duties.

So, if you fit the description, read on.

Print this guide to keep on your desk.

The idea with a B2B case study is to reflect a story your prospect can relate to.

Show them you:

- Solved a problem like theirs
- Solved a unique challenge and you're capable of solving theirs.

But wait. None of my customers want to talk after they get what they want!

Ain't that the truth. In B2B it's particularly tough getting a customer to chat after the transaction is complete.

Sometimes you're lucky enough to get a pre-chat, and that fizzles out. Most of the time you get ghosted.

However! There are some tricks you can use to make that interview more likely (trick #1 being don't call it an interview).

- Ask! As the last step in the sales process, get your sales rep to simply ask the customer if you can contact them in a few weeks. “Can we reach back out for a quick follow up chat to see how everything’s going and get some feedback on your experience?”
- Bribe! “We like to get case studies from our favorite customers, and anyone who participates gets a $100 Amazon gift card. Would you like one?”
- Follow up! Put together a simple email automation that follows up with every customer. “We enjoyed working with you and would like to slot in a quick chat to gather feedback on how your particle counters are working out. You can book it in my schedule at this link, or just let me know when works best for you and I’ll block that time and give you a call.”

So many opportunities are missed because we just don’t ask. People want to talk about themselves, and you're giving them the chance.

A unique angle on your case study is always better, in our experience, than something universal. There's an argument for a case study addressing a very common application, but usually readers drawn to something unique. Something about their own industry that makes them laugh or learn or nod in agreement. Something that makes them feel validated in some way. Like a parent scrolling through Instagram and stopping on a video about getting their kids buckled into the car seat. I totally get that. It’s hard and it sucks. This makes me feel good and validated. I better subscribe to this for more!

Something that shows them a flicker of their own challenge, and they'll fill in the gaps so they see themselves.

Seems like a tall order, but all it takes is a little time sitting at your computer with a blank document on the screen ready to type out ideas. Brainstorm, like you did in highschool, and you’ll find the inspiration you need.

But how do you actually write a case study?

Everyone thinks they can write a case study.

It’s easy, just write about what happened!

Then they write it and it sucks. Because it’s not just about what happened. It’s about why. And telling the story of why in a compelling way.

The why is the old world marinara sauce. Without it, even the freshest noodles (or the best possible what) are tough to swallow.

So here’s the simple process to make that compelling narrative create itself.

Skip the stress and get us to do it instead. None of the stress, all the recognition.

Step 1. Interviews!

You can certainly write a case study with a few emails back and forth. But that has a high likelihood of turning into one of those noodles with no sauce things.

The best thing you can do is talk to these people:

- The person who bought the thing.
- The person who helped the person buy the thing.
- The person who is using the thing now (if different from the person who bought - graduate students using an apparatus purchased by a principal investigator in a university lab, for example)

In the best case scenario you talk to each of them twice.

In the second-best case scenario, you talk to each once and get some follow up questions answered through email.

In the third-best case scenario, you talk once, but you get plenty of information to build the case study in that single conversation.

<u>But what kind of things do I ask in those conversations? I'm no journalist!</u>

Take a note from your kids. Or your niece and nephew. Or the annoying kid next door.

You can ask why in a hundred different ways!

Why did you choose us over the other brand?	Why did you need a new solution in the first place?	Why was this a good solution?
Why did you choose this model over another model we offer?	Why did you decide to call us vs. completing a form on the website?	Why didn't you choose this competing solution?
Why didn't this seem like a risky purchase to you?	Why did you need this now?	Why are you changing the way you do X?
Why AREN'T you changing the way you do X?	Why is this the right use of your budget?	Why can't you do this with existing tools in your workplace?

Of course you should ask the what questions too:

What were you using before this?	What made this the right solution?	What prompted you to contact us on the day?

What does your application look like now?	What was the problem before?	What else could you have done with this budget?
What could we have done differently?	What did we do right?	What improvement has this made to your everyday?
What is the long term impact of this purchase to your work?	What's the most immediate impact to your work?	What kind of research did you do before contacting us?

A lot of the what questions are reframings of the why questions. That's sort of the point. You'll dig up more valuable insights by reframing questions.

Don't have time for interviews? We do.

Step 2 - Start writing

There are a few different ways to start writing your case study. We all have different styles. And some of us haven't discovered our style yet. So here are a few different ways you could start.

Try writing like you're making an infographic.

This is handy because later, you can make your case study into an infographic.

Here's the easiest way to organize your thoughts to start writing like an infographic.

1. Who is the customer?
2. What was their challenge?
3. What did they need to overcome that challenge?
4. How did you (or your colleague) approach the challenge?
5. What was the identified solution?
6. What were the results for the customer?

An infographic has to be concise and orderly, so organizing your thoughts as though you're making an infographic can help.

Check out this infographic as an example. Orderly, clear, compelling
www.jbbgi.com/infographic

Try writing it like a story.

Even if you haven't written a story before, you've read them. You watch movies.

So start at the beginning.

1. What is the setting? On a swampy patch of land in the south of Florida is unassuming white, sterile building filled with the brightest minds in your industry…
2. What is happening? They're working out ways to build a better rainbow-colored ketchup manufacturing line…
3. And what's the problem? But getting the yellow ketchup to stop bleeding into the green is a huge problem…

You successfully set the stage for a story to unfold. Where your business helps this beleaguered soul overcome a challenge and achieve success (whether that's profits or any other landmark achievement to that customer).

Try writing it like an interview.

When you interview the customer, you ask your questions in an organized order. One thing naturally leads to the next.

So you already did most of the work.

If you don't feel your customers need all the razmataz of a story or a refined presentation, give them the interview.

Or try writing it like a thought leadership piece.

We outlined detailed steps to walk through when creating thought leadership content in this blog.

It starts with the mind map. And the positioning of your problem or solution in the middle of the mind map.

This works just as well for a case study.

In fact, you could create your mind map before you do your interview. Or after your first interview, but before your follow up interview.

You can use it however you feel comfortable. It's going to be a big help.

Step 3. The visuals

A case study is most effective when it comes with interesting visuals.

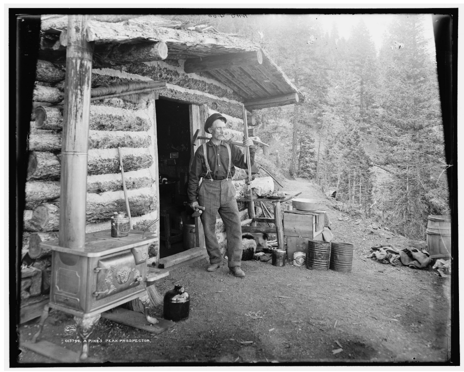
A lot of B2B manufacturers or distributors don't consider the design elements that most prospects are actually very drawn to.

But your prospects are people. People like pictures and colors. Neglecting the visual element of your case study can waste all the time and energy that went into getting the interviews, researching, doing them, and spinning it all into words that matter.

If there are field applications for the case study subject in question (like our example above) field imagery is always compelling.

If there is historical information about the subject of the case study. Historical images are super cool.

This image is way more interesting



Than this image

If you started writing your case study with the infographic method, you can easily create an infographic to go along with it.

Then you can use that infographic on social media, in emails. You can print it and bring it to tradeshows. You can drop it from an airplane as you fly over the workplace of your ideal customer. You can turn it into a billboard and plaster it along every major commuter route across your most valuable service area.

Step 4. The review

The last step is to do an honest review before you let this permission asset loose on the world.

Of course you want prospects to download this so you capture their information. But you don't want them to download it, read it, and dismiss your brand based on what they read.

You don't want them to feel bamboozled. You want them to see value. So they continue with the relationship and take a step forward with your business.

Don't forget, your prospects aren't solopreneurs. They are surrounded by other influencers inside their organizations. Stakeholders in the acquisition of this new asset you're trying to sell.

You want them to quote your permission asset. Screenshot it. Put it in their budget request proposals and internal powerpoint presentations. You want them to easily arm themselves with information so they can convince their bosses to allocate budget with no resistance.

The word count rule of thumb!

Your case study should be at least 1,500 words long.

Anything less and the story might not be interesting enough to tell. Or you're leaving out important/valuable details.

On the other end, 3,500 words is about as much length as you can expect a reader to endure.

Too short and the reader could feel tricked into download a blog post without any deep insights into their issue.

Too long and the reader will skim, missing important points that could have turned them into a customer.

Follow the steps and your B2B case study is easy to write.

When you're done, click to this blog about the landing page you have to build to get your case study downloaded (and your prospects' contact information collected).

in **Our blog**

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