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Everything you need to know about writing a B2B case study

Give us ten minutes. We'll give you the power to write one of the most enduring, persuasive marketing materials in the known universe.

The written case study is the WD-40 of B2B marketing tools.

Case studies have been around forever, they're not exactly glamorous, and they're popular for one simple reason. They work. (Regularly lubricating those narrow few inches at the base of the sales and marketing funnel.)

The power of the case study is easy to understand. What's more persuasive than learning how a company has helped someone just like you? And helped them so much, they'll sign up to tell the world about it? But some case studies are way more powerful than others. Because – let's be clear about this – writing a genuinely brilliant case study is tough. You need 100% commitment from your company and the customer. You need above average interviewing and writing skills. And, of course, you need the magic formula...

The case study formula

Unlike a can of WD-40, what goes into a case study is far from a trade secret. It's typically:

1. The challenge
2. The solution
3. The benefits
4. Glowing customer quotes

You can mess with the order of those elements but, unless you're writing for a particularly iconoclastic brand, you might want to leave them alone. The flow is natural and chronological, and provides a solid structure for the whole process.

Before you talk to the customer

Your time with the customer is precious, and you don't want to waste it getting information you could have found elsewhere. So before the customer call, track down someone who knows a bit about the story – usually their account manager.
You can ask them:

- What the customer does
- What the customer bought
- Who's the best contact, and what their job entails
- What they think is the most interesting thing about the story

By the time you're done, you should have a basic understanding of the 'solution' part of your case study. And when you get to the customer call, it'll let you focus on stuff that only they can tell you.

The customer interview

In the thirty or so minutes it takes to interview the customer, your case study's potential for greatness will be decided. The material you gather here will dictate how much you can achieve at your keyboard later on.

Put together a list of open questions, designed to give the customer ample chance to talk about each bit of the case study formula: the challenge they were facing, the solution, the benefits it delivered and how they feel about the whole situation.

Keep your ears open for answers that suggest further questions – these tangents are often really productive – but keep an eye on the clock, to make sure you get everything you need.

Press for concrete results. How much money have they saved? How much faster is the process now (in hours, or days, or weeks)? How many extra people would they need to do this stuff manually? This can feel awkward in the context of the conversation, but makes a huge difference to your finished text.

Writing a compelling story

Some writers create an outline first – with sections based around the magic formula – listening back to their call recording to fill in the gaps as they go. Others look for the juiciest customer quotes, then find a way to connect the dots. Either way, these tips will guide you:

Lead with the biggest result. Your headline has to capture attention, and sell the rest of the piece. So you'd need a pretty compelling reason not to put your most concrete, most impressive result front and centre. Your title can then promise to reveal how the customer did it.

Make the customer the hero – but keep the business case clear. A great case study pulls the deftest of balancing acts. It tells a relatable story about human beings, but also keeps the business results in the front of the reader's mind. So write from the heart, but use subheads, box-outs and pull quotes to make the benefits leap out from the first, cursory scan.

Make everyone look good. Your interviewees will often trust you with information that could be used to show their business in a bad light. When this happens, tread extra carefully. Your job is to make everyone look good – not least your customer contact, and their boss – if you don't, you risk damaging the relationship between the two companies.

Don't be scared to edit the customer's ramblings. Here's something a lot of people don't know: it's OK to rewrite what your customer said to make it read well. They won't sue you; if anything, they'll be pleased. (Do check they're happy with your version though.)

But do strive to keep their authentic voice. The fact you've actually spoken to the customer automatically elevates your case study above a lot of the competition. So when you add their glowing testimonial, be sure to preserve their more interesting turns of phrase; it'll add life and authenticity. (Frankly, if you can tell the customer's story almost entirely in their own, neatly quoted words, so much the better.)



What should the reader do next?

Since most case studies are designed to sit at the bottom of the sales and marketing funnel, the call to action will often be to get in touch with your company.
Whatever you'd like the reader to do next, it's nice to refer back to the story, so your call to action flows neatly from there. For example...
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I could drink a case of case studies

When everyone involved is fully engaged, the case study is easily one of the most rewarding content pieces to write. You get to talk to a real human being, someone who actually uses the thing you're trying to sell – giving you invaluable insight for future projects. And you get to make a lot of people feel good about what they do. Which, you know, is nice. Use your new power wisely. And have fun along the way.

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If you work in B2B, there's a good chance you've read our work without knowing it (we write for 60 of the biggest brands in tech).

Fancy a chat about content?
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