ORANGE MARKETING

Case Studies

Case Studies are one of the most important pieces of content you can create. If you follow our guide, you'll end up with not one but three assets you can use to drive sales:

- Downloadable Case Study pdf used in the sales process, or placed on a Landing Page as a downloadable asset
- An edited Video of the conversation used for sales or placed on a Landing Page - "Watch the Recorded Webinar"
- Blog post or posts that feed into the landing pages

IMPORTANT: Before making any of the pages live, make sure any required permissions from the happy customer's people are obtained.

Checklist

- [ ] Coordinate a video recording between the client and their happy customer to feature in the case study
- [ ] Use Zoom or another webinar/webshare to record the conversationon video– make sure you have recording access.
- [ ] Send Zoom meeting link invite to the interviewer (product manager, customer success leader, CEO, etc., and of course the happy customer.
- [ ] Prepare interviewer and happy customer with questions prior to the call (sample of questions here). Have client select 7-10 questions and ensure happy customer receives those selected questions to prepare.

  Client should focus on questions that answer:

  - Who is the happy customer/describe their business
  - What is the problem they were trying to solve
  - What methods have they considered to solve the problem
  - Why did they choose (client business)
  - What were the results/outcomes since implementation
- [ ] Prepare client and happy customer with the below recording tips:
  - Sit in a good place where the light is in front not behind. You can use another computer with a white screen if you need some extra light
  - If possible use the computer audio, it will help with transcription
- [ ] Link your Zoom account with a transcription like Voicea or Rev.com if possible so a transcript can be automatically created of the recording.
- [ ] On day of recording:
  - Do quick intros that can be cut out and ensure to mute yourself and any attendees that are not the Interviewer and Interviewee.
  - Have the Interviewer introduce themselves and happy customer, including name, title, and company. Have Interviewer thank customer for their time.
  - Then Interviewer moves to questions with something like: 'lets start with some questions about your company and how you came to (our company).
  - When interview done, select end meeting.
- [ ] Allow the meeting to render in Zoom (can take a bit of time). Then upload the MP4 into the client's Case Study folder-in Content Collateral folder.
- [ ] Upload the EVA transcript word doc into in the client's folder as per above as well.
- [ ] Prepare the video editor on the team to edit the video. Instruct them on the focus of the video and where all the files are.
- [ ] Use the recording and transcript to help create the Case Study doc.
- [ ] Create a Landing Page for the Case Study to sit behind.
- [ ] Once the video is edited, create a Landing Page for the video to sit behind.
- [ ] Create a blog post about the case study that feeds to the landing pages.
- [ ] After obtaining relevant permissions from happy customer, post pages.

Case Study Questions

Case Study Interview Questions About the Customer's Business

Use these questions to get some background information about the company and its business goals. This information can be used to introduce the business at the beginning of the case study.

1. Would you give me a quick overview of [company]?
2. Can you describe your role?
3. How do your role and team fit into the company and its goals?
4. How does our product help your team or company achieve its objectives?

Case Study Interview Questions About the Before Scenario

1. What was your team's process prior to using our product?
2. Were there any costs associated with the process prior to using our product?
3. What were the major pain points of your process prior to using our product?
4. Did our product replace a similar tool or is this the first time your team is using a product like this?
5. What other challenges were you and your team experiencing prior to using our product?

Case Study Interview Questions About the Decision Process

1. How did you hear about our product?
2. How long had you been looking for a solution to this problem?
3. Were you comparing alternative solutions? Which ones?
4. Would you describe a few of the reasons you decided to buy our product?
5. What were the criteria you used when making the decision to buy our product?

Case Study Interview Questions About the Customer's Business Case

1. How long have you been using our product?
2. What was the most obvious advantage you felt our product offered during the sales process?
3. Were there any other advantages you discovered after using the product more regularly?
4. Are there any metrics or KPIs you track with our product? What are they?
5. Were you tracking any metrics prior to using our product? What were they?
6. How has our product impacted your core metrics?