



THE GUIDE TO

CREATING CASE STUDIES FOR YOUR AGENCY

HOW TO CRAFT KILLER CASE STUDIES THAT BUILD TRUST, ATTRACT NEW BUSINESS, AND SELL FOR YOUR AGENCY.



INTRODUCTION

Building Trust Through Proof



You stumble upon an unfamiliar brand online.

It's selling blenders with 1,500 watts of power, five speeds, and six blades, making it perfect for pulverizing the ingredients for your pomegranate strawberry smoothies.

The product looks like it will work. And even though you have never heard of the company, you enter your information, and click "buy".

Do you find this story believable?

What word made you begin to doubt?

Most people don't trust anything "unfamiliar" online, and it's because few shoppers would believe the claims of a brand without doing research to verify this information. They want to know who the brand is, what its history is, and most importantly, what other customers have said about its products.

THE GUIDE TO CREATING CASE STUDIES

Customers need proof that your product works and that you will stand behind your promises if it doesn't.

Now consider a different version of this story:

You hear about this amazing new blender on the market. You need something powerful. You are willing to pay for it.

You visit the website of the company, and it has videos where its blender has chopped, diced, and juiced everything from super glue to baseballs to an iPhone 5S.

You can actually see your future purchase in action. And while you won't be sticking any glow sticks or oysters in your blender anytime soon, you do need something that won't begin to smoke and shoot sparks after blending a few cups of ice.

This is believable, and it's how Blendtec grew its retail sales by 800 percent in the past eight years¹.

Now, I realize your agency might not be able to fit its process and value proposition into a twominute video featuring wacky products, but you do need to develop a compelling way to showcase how your team delivers creative solutions that drive business results. Remember: Your agency doesn't sell creativity or time. It sells how it uses its collective knowledge and expertise to deliver solutions and results.

The challenge is that is can be difficult to close a deal based on the promise of a future.

But there is a format that can allay fears and dismiss doubt: the case study.

It is your agency's equivalent of a demo. It gives prospects the opportunity to see what it would be like to buy your services. They can put themselves in the mindset of your past clients and realize how they could also benefit from a partnership.

"There is no other better selling tool than the case study," said Todd Hockenberry, the founder of Top Line Results, a marketing agency that focuses on revenue growth for manufacturing, technology, and capital equipment companies.

"The hard part isn't writing about a case study," Hockenberry said. "It's doing the work that is worthy of writing about."

YOUR MOST VALUABLE TOOL

WHY CASE STUDIES HELP YOUR AGENCY SELL



Fi's case study on the <u>Ramayana project</u> allows the reader to move a magnifying glass across the screen to view map details.

Case studies might seem like an uninspired answer for showcasing your agency's planning process and creative execution.

In the past, you might have been right.

But today, case studies don't have to be a three-page PDF document. They can be interactive, immersive online experiences that showcase how an agency used its intellectual capital, processes, and services to overcome a client's challenge.

More importantly, case studies help you sell because they ultimately create trust, which is something agencies need more than ever. Trust is what helps you win new clients and retain your current clients. Trust says that clients believe you can do what you say you can do – now and in the future.

If you don't have trust, then you can only compete on cost, which is a losing battle for any agency that competes in a marketplace where you can get a logo for \$5. The problem is that a lot of marketing agencies don't approach creating case studies with the idea that they can be used to build confidence in their services and authority for their agency. They use them as a creative showcase of their work, not as a way to demonstrate what clients can expect from working with the agency.

Hockenberry, who uses case studies to obtain referrals and references, said: "They [prospects] see themselves in it. They have the same kind of problems. They're interested in the same kind of results.

My conversation then starts off at a much higher

level."

These higher levels of conversation happen when a baseline of trust is established. For guidance, consider the 16 attributes of trust, which were identified and grouped by the Edelman Trust Barometer². Use the following questions as a framework for building out a comprehensive and trust-based view of your agency.



ENGAGEMENT

What types of reports and updates were provided during communication with the client?

How does your team respond when a client doesn't agree with your agency's approach or doesn't like the creative produced?

What types of support, resources, or training does your agency provide?

THE GUIDE TO CREATING CASE STUDIES



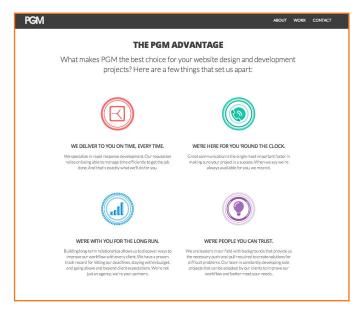
Code and Theory details its values and approach.

INTEGRITY

What values do you promote internally? How do you attract employees who embody these values?

What happens when your agency makes a mistake? How do you repair the situation?

What investments do you make to ensure your business will be here in a year or even 10 years from now?



PGM focuses on communication, workflow, and deadlines.

QUALITY

What checkpoints do you have in place to determine if the work is high quality and effective?

What research is completed to determine if the campaign will connect with its target audience?

Do you consider the longevity of the campaign, design, or website? How will it perform two years from now?



Made Movement works with brands that manufacture products in the U.S.

PURPOSE

How do specific services provide business value for your clients? What has your agency done to help transform and improve its clients' brands?

How do you support the greater community? Do you use your agency's talent and expertise to spread awareness about important issues?



Grok promotes its growth and awards on its homepage.

OPERATIONS

Is your leadership respected and admired?

Does your company invest in technology so staff can produce efficient and effective work?

Are your employees invested in the future success of your agency?

MAPPING THE JOURNEY

HOW CASE STUDIES FIT INTO THE BUYING PROCESS

Your agency's website can't be just a brochure for your service offerings and contact information.

Consider this: Forrester Research found that B2B prospects could be anywhere from 60 to 90 percent³ through the buyer's journey before even contacting a sales person. If your web presence doesn't sell for you, then you may never get the chance.

Case studies educate prospects throughout the buyer's journey, making them important for both people trying to understand their problem and those who are comparing your agency to your competitors prior to purchase.

So while potential clients may not visit your site because of your agency's library of case studies, they will notice if they are non-existent as they journey deeper into the buying process.

The good thing is that you can use case studies

to reach people in different stages of the buyer's journey, and you can answer specific questions to help move them farther along in their decision.

Jam3, a digital production studio located in Toronto, Canada, uses case studies during "meet and greets" with potential clients or agency partners. And because most of the studio's work revolves around developing new technology that is leveraged during the creative process, Jam3 relies on the case study format to showcase how



Jam3 outlined the technology required for the product.

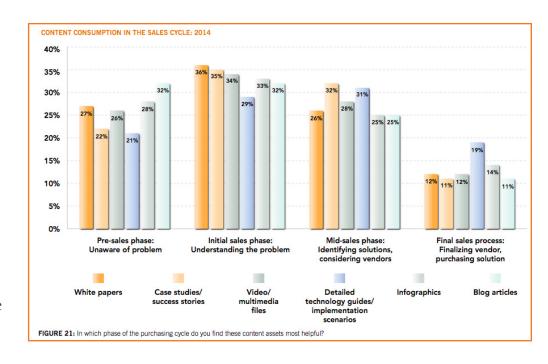
THE GUIDE TO CREATING CASE STUDIES

its tools were used to produce the final project.

"It's hard for us to sit in front of someone and say, 'So, we built this 3D particle engine, and it was great," said Pablo Vio, the creative director of Jam3.

"If you don't have something you can show them [prospects] or something they can consume really quickly, then it feels a little lackluster," Vio said. "People don't really get the magnitude of the work."

Eccolo Media's "B2B Technology Content Survey Report" shows just how important case studies are throughout every stage of the buying process – from pre-sale to purchase. Case studies outrank white papers, video, technology guides, infographics, and blog articles during the consideration phase, and they are the second most used information source during the awareness stage.



When putting together a case study, consider each phase and how you can answer questions for prospects who want to understand their challenge, are looking to solve their problem, or are comparing vendors.

Let's take a sample journey through the buying process to understand the questions you need to answer for buyers in each stage.

Awareness Stage Consideration Stage

Decision Stage

AWARENESS

Charlie, a CMO for a software company, realizes he has a problem converting his leads into customers. He doesn't yet know if this is a marketing or sales problem. He begins by researching how to improve customer conversion rates.

Ouestions to answer:

How did your client learn about your agency? How did the client perceive his business's challenge?

Does your agency have specific knowledge in an industry? Does it have experience solving this specific problem?

CONSIDERATION

Charlie has identified that his main problem is attracting the right type of customer. He doesn't understand what information potential customers need, and he is struggling with how to qualify those that do need his company's services. He needs resources to help him transfer more qualified leads to his sales department.

Questions to answer:

How did your agency work to understand your client's target market? What discoveries were made during the planning phase?
How did this understanding help you develop campaign strategies?
What metrics were defined and measured to

What metrics were defined and measured to prove your success? What was the result?

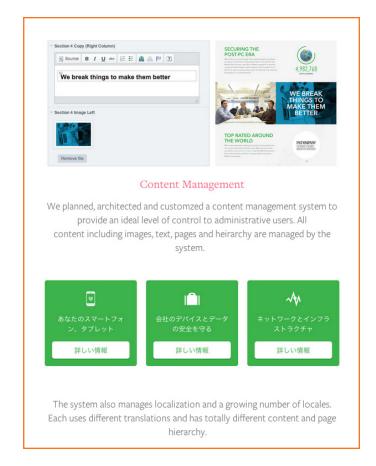
DECISION

Charlie has narrowed down his list of potential agency partners, but he wants to make an informed recommendation to his CEO and VP of Sales. He knows that each of the agencies on his list can deliver a solution. He's just not sure which one is the best fit.

Ouestions to answer:

- How did you handle setbacks or challenges during the client project?
- Why did you want to work with this specific client? Did you share any values that made your relationship stronger?
- What did you learn during the relationship?
- What was the client's reaction to the work you completed?
- Did you implement a repeatable process one that you perform for all of your clients?
- Why was your agency the best option?

Case studies shouldn't be an advertisement for your agency. They need to create a connection with the prospect, and self-promotion rarely accomplishes this.



<u>Wintr</u> described how it developed a custom CMS to solve for localization issues.

ANATOMY OF A CASE STUDY

HEADLINE

Let's do a headline test. Which would you be more likely to click on?

KIK Brand Marketing

or...

Canadian Agency KIK Brand Marketing Gains New Retainer Clients and Increases Client Spending 150% Using HubSpot

The answer is pretty simple. The first headline tells you very little. This is another way for your agency to say: The best thing about this case study is the brand and its reputation, not our work or the results.

The second headline provides specific information about the type of business and location of KIK, and it focuses on the benefits — gaining new retainer clients and increasing client spend.



It makes a promise to the reader: You will learn how to achieve these results if you read this case study. Be specific and unique. Promise to solve a problem. Don't let readers ignore your case study because of a bland headline.

SUBHEADINGS

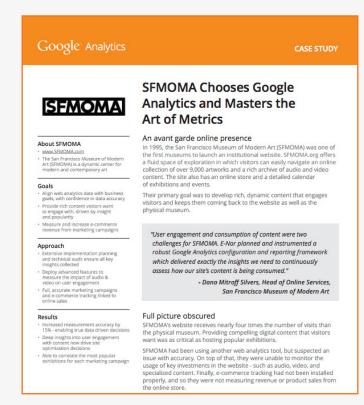
Would you ever leave the table in the middle of a four-course meal?

Depending on whom you decide to dine with, you might be compelled to jet, but most people would sit through a dissertation on self-reflexive intertextuality (whatever that means) for a steak and a piece of chocolate cake.

So while your heading gets people in the door, your subheadings are what make prospects stick around to find out the end of the story.

These mini-headlines should demand attention, provide an overview of your story, and point out the most relevant points of the case study.

If you continue using words like objective, process, results, or solution to break up thick chunks of text, then you are making it easy for your audience to skip out.



<u>Google Analytics</u> uses subheadings to tease the next section of its case study.

BODY

You don't need to write a 3,000-word manifesto that details every email exchange or showcases the 20 sets of revisions your team — happily — suffered through. No one needs to relive that. But too often, agencies simply highlight the creative and plop in a paragraph about the brand. Then, it's on to the next project.

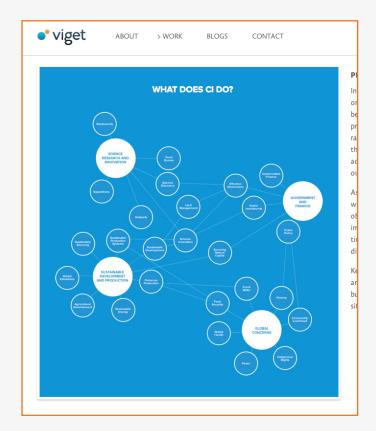
This approach is a glorified portfolio. If you want your case studies to sell, then you need to adjust your approach. You need to tell a story — one that has tension, obstacles, goals, and hopefully, a victory.

Consider answering these questions in your next case study:

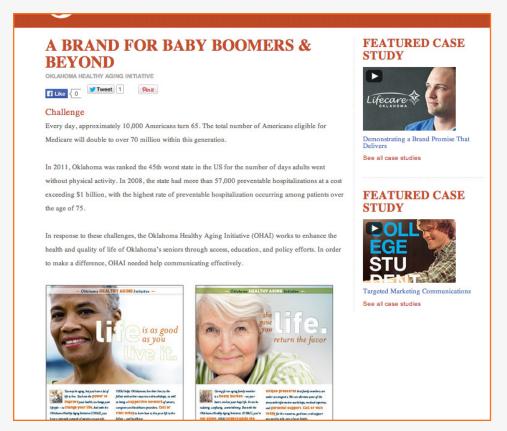
CHALLENGE

What pain points were present when the brand contacted you? What was the first meeting like?

What negative consequences did the client want to avoid?



Viget created a graphic to showcase <u>Conservation</u> <u>International</u>'s diverse range of projects and locations and how this created confusion for web visitors.



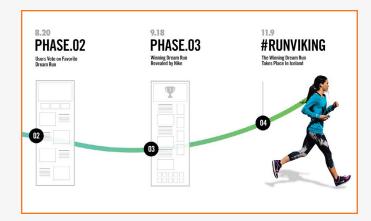
<u>Third Degree Advertising</u> set the stage for its work for the Oklahoma Healthy Aging Initiative by sharing the costs of preventable hospitalizations.

CLIENT

Who is the brand? Why were they interested in your agency?

INDUSTRY

How did this brand's problems reflect a larger industry or market issue? Are there new competitors, or did consumer behavior change?

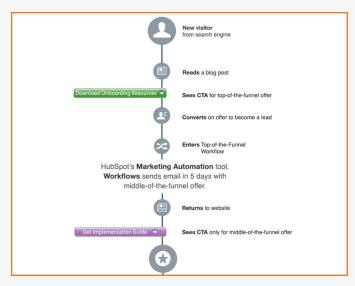


<u>Instrument</u> broke out the Nike "Run Free" campaign into phases.

SOLUTION

What insights did you uncover about the brand and its market?

How did you use this to develop a strategic plan for reaching the brand's goals?

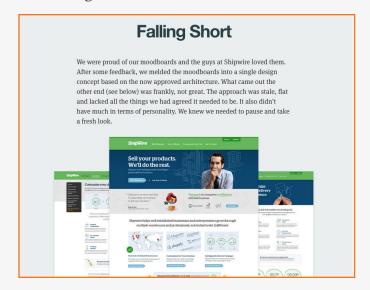


<u>Puma Creative</u> published the email workflows created for its client SEERhealth.

IMPLEMENTATION

What was the solution? What were the challenges during this phase?

How did you revise the solution to reflect newfound insights?

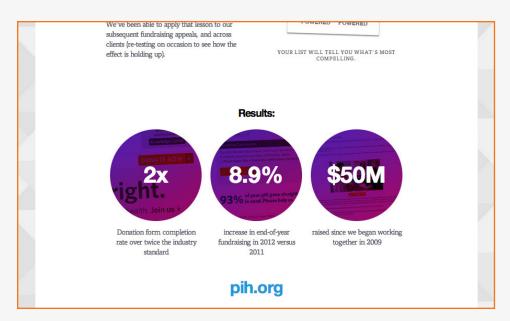


Teehan+Lax wrote about its design failure.

PROCESS

How did you communicate with the client? What expectations were established?

What type of relationship did you build?

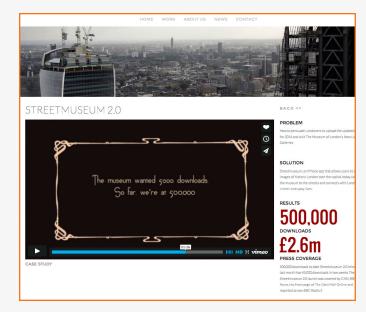


Blue State Digital published key results from its work with Partners in Health.

RESULTS

What goals were achieved through the relationship?

What tangible and intangible results did your client see?



<u>Brothers and Sisters</u> uses video and a sidebar to showcase the results from the launch of an iPhone app.

QUOTES

You've created the perfect narrative for your case study.

It's an epic saga detailing how one agency helped a client grow her business.

Your team is standing by the phones, waiting for the flood of calls you'll receive after you press "publish."

The problem?

No one is going to believe you.

You forgot the one thing that turns your fairytale into a credible story: quotes.

Quotes should authenticate your claims and augment the story with interesting details and anecdotes. Get into a journalistic mindset when conducting interviews, and ask questions that help you see the project and relationship through the perspective of the client.

Start by asking your client these questions:

- What was the main problem you struggled with?
- What was the determining factor for choosing our agency?
- What did you like about working with our team? What types of relationships did you form?
- What was the main benefit you saw from working with our agency?

Choose a few succinct and detailed sound bites. Weave these throughout the case study to support the facts. You can even increase the likelihood that your readership will consider the clients' quotes authentic by adding a headshot. Research has shown that people are more likely to believe a claim if a photograph accompanies the information⁵.

VISUALS



Let me guess.

You've spent hours and hours writing, perfecting, and polishing your prose.

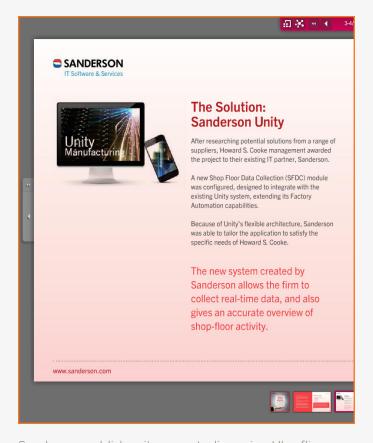
The problem?

No one wants to commit to reading a novel during her workday.

She has email to get through, tweets to read, status updates to reply to, and calls to return before she even does any "real" work.

Don't worry about writing a novel-length case study. Instead, mix in visuals – videos, images, and graphs. You can even experiment with other media formats to make your case study easy to read and remember.

<u>DuPont</u> creates infographics to highlight previous work.

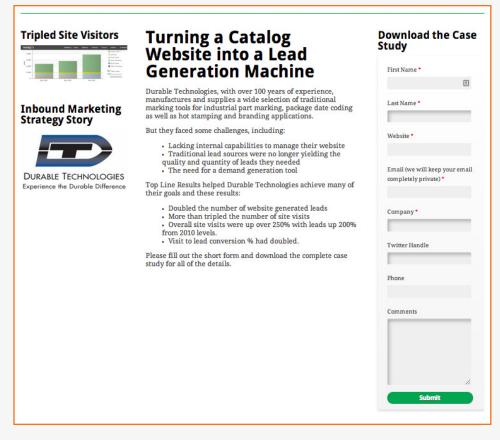


Sanderson publishes its case studies using Uberflip.



<u>Jam3</u> uses a seamless looping video in the header.

CALL TO ACTION



<u>Top Line Results</u> requires visitors to complete a form prior to downloading the case study so that it can qualify visitors.

Your case study proves you've got the design, technical, and writing skills. You know the industry and can prove results.

But the phone is still silent. You wonder what you did wrong.

You forgot the most important part of using case studies to sell: the call-to-action.

You need to convince your target persona that she should stick around to download an offer and fill out a form. And you should know which prospects are actively pursuing your agency.

Your call-to-action should lead to a landing page or a contact form where you can gather information on the prospect's budget, challenges, and goals. Without this, you will either waste time calling a prospect who isn't the right fit or you won't be prepared to ask questions that will make your first interaction memorable.

Follow these guidelines to make sure your call-to-action converts the right readers.

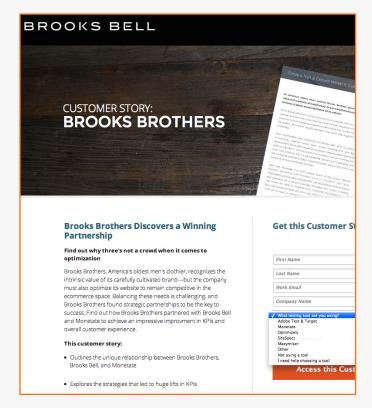
Start with a verb. Use words like download, schedule, get, contact, and find. Be direct about what you want the reader to do.

Convey value. Be clear about what the viewer will get by clicking the call-to-action.

Be relevant. The call-to-action should align with either the results or the tactics used in the case study.



New Breed Marketing offers a guide on website redesign.



<u>Brooks Bell</u> helps companies scale their optimization practices. It uses a gated case study to determine if leads have already invested in optimization services.

CONCLUSION

INSPIRE PROSPECTS TO ACT

Convincing a potential client that you are the right agency and the right partner isn't easy.

This is even more challenging in an industry where agency of record accounts are disappearing and more and more brands are bringing marketing services and production inhouse.

But with a comprehensive library of case sudies that showcase the results your agency can achieve, the processes you work through with clients, and your experience in a specific category, you won't have to "talk" a prospect into working with your company. And you won't have to fight on price because clients want value and expertise, not the lowest bidder.

Inspire your prospects to act, remove their objections, and reduce their fear of making the wrong decision by writing about the work you are capable of.

Do this and you won't need sales tactics and powers of persuasion. Your prospects will know you are the right agency for their challenge.

STRUGGLING WITH CREATING CASE STUDIES THAT SELL?

Contact HubSpot for tips on how to attract and convert new business prospects. http://hub.am/1kzzCbM



THE GUIDE TO CREATING CASE STUDIES FOR YOUR AGENCY

CREATED BY

Jami Oetting

As a content strategist at HubSpot, Jami creates content and resources to help agency partners grow their businesses.

She is also the editor of <u>The Agency Post</u>, an online publication where marketing agency professionals can share their point of view to provoke discussion and debate.

INTERACT WITH ME ON TWITTER

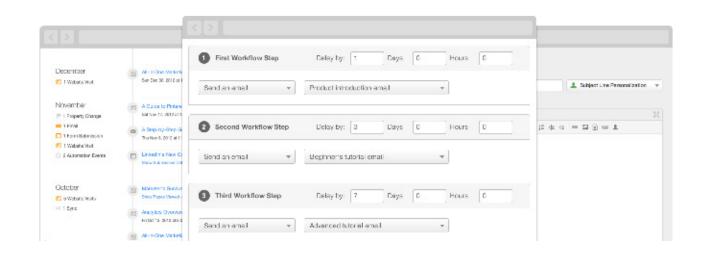
@JAMIOETTING





Marketing automation is only one part of HubSpot's inbound marketing software.

HubSpot brings together all of the tools you need to attract, convert, close and delight customers, including marketing automation. See all of our tools, learn more about inbound marketing, or talk to a specialist today.





















Landing Pages

Forms

Lead Management

Email

Marketing Automation

ing Analytics

Salesforce Sync

Social Inbox

Blogging

Learn more about inbound marketing

See the software

Talk to a specialist

SOURCES

- $1.\ http://features-beta.slashdot.org/story/13/03/13/161200/interviews-blendtec-founder-tom-dickson-answers-your-questions$
- 2. http://www.edelman.com/post/the-keys-to-building-trust/
- 3. http://blogs.forrester.com/lori_wizdo/12-10-04-buyer_behavior_helps_b2b_marketers_guide_the_buyers_journey
- 4. http://eccolomedia.digarati.com/
- 5. http://www.ncbi.nlm.nih.gov/pubmed/23876251