

CASE STUDY QUESTIONNAIRE

WHY CASE STUDIES MATTER

Consumers and businesses are doing more self-guided research than ever on products and brands before engaging with a sales team member or making a purchase. Case studies are a great way for you to build trust through proof by showcasing real results you've gotten for another client or customer.

HOW TO COMPLETE THIS QUESTIONNAIRE

This questionnaire will cover all of the essential elements of your case study. Unless otherwise noted, you do **not** need to answer a question with complete sentences. (Bulleted lists are totally fine!) Instead, focus on making sure you are providing information that is **specific, clear and thorough**. We'll take care of the rest!

Also, you can skip questions that are fundamentally inapplicable to the client situation, but only do so if it is completely outside of the scope of the case study. If you're unsure, err on the side of caution, as it is better to provide too much information rather than too little.

ABOUT THE CLIENT

What is the full name of the client brand?

What industry are they in, and what is their position within the industry?

Example: Leading health care solutions provider in the Mid-Atlantic region.

What are important details about this client that should be shared?

Do they have multiple locations? How large are they? Etc.

Have you received explicit permission from this client to use their name and logo for this case study?

THE CHALLENGE

What issue, challenge or pain point did the client want you to address?

What business objective were they trying to achieve? If it was a pain point, was it a new issue or a pre-existing one? Was it specific to their business or was it the result of changes in the industry or overall market?

Why did they engage your company to help?

Were you selected for your expertise? Were they referred to you? Were you selected from a number of different options? If so, what were the differentiators that made them choose you?

Why was your company uniquely positioned or qualified to address this challenge?

In one or two full sentences, what were your client's expected outcomes from working with you?

THE SOLUTION

How did you approach the challenge?

Did you base your response on experience, or was it a brand new challenge that required you to think outside of the box? What research did you conduct? Who on your team was involved?

What was the solution?

What did the solution look like? What products or platforms were developed/deployed or used? Why did you make those choices?

What was the timeline?

How long did it take to plan/design/develop your solution? How long did take to implement?

RESULTS

Did your solution solve the client's stated problem or accomplish their objective(s)?

What benefits did your client see as a result of your work **immediately?**

Increased employee productivity? A better system, platform or software solution?

What benefits should your client see as a result of your work **over time?**

Increased sales? Reduced turnover?

Are there **specific KPIs, measurements, statistics or ROI data you can share that clearly demonstrates the value of the solution/service/strategy you provided?**

Please include what each statistic is, as well as over what period it was measured and its relevance to the client's objective.

Which one of those data points would you consider to be the most important? Why?

Do you have a client testimonial or quote you can share about this project?

Please include their name and job title, if given permission to use their personal information.

FOR YOUR AUDIENCE

Which of your audience personas are you targeting for this case study?

You can target more than one.

In **one full sentence, what should this case study demonstrate to readers?**

An ability to be adaptive? The depth and breadth of your experience? Your knowledge and expertise of a specific industry or market segment? Your ability to deliver a specific kind of result?