Secrets of Case Study Winners:

How B2B Marketers Create Successful Programs

The Content Factor™

A Content Factor White Paper

Case Studies: Every Marketer's Problem Child?

We hear the objections all the time.

- "We're not ready to endorse your product at this time."
- "Our executives won't sign off on it."
- "We don't want to tip our hand to our competitors."
- "We don't do case studies with our vendors."

Excuses like these are a veil for not executing. Even as social media brings clients and vendors together to "engage in the conversation," you'd think that case studies would be easier to develop. But they are no less challenging than before. In the face of hard resistance from clients, most B2B marketers manage to publish only a smattering of case studies.

"In a survey, our salespeople said that case studies are the #1 most useful marketing tool they have, above analyst reports and other collateral."

Mindy Kenney, Director of Customer Leadership Marketing, Manhattan Associates

Yet a few B2B companies do stand out. Several interviewed in this paper have strategically produced dozens (in one case over one hundred) client case studies. Their success with case studies is not due to their products' superiority, but to their straightforward and calculated techniques for getting their clients on board. As a result, their sales teams benefit from broad collections of case studies, and first-class reference programs. This paper reveals their secrets.

What's in it for you? A lot!

Case studies are a different animal from other marketing collateral. The expert is a client, not an in-house analyst or product manager working for the marketer. Case studies require well-planned interviews and rigorous fact-checking. The good ones tell a nice story, and they resemble magazine articles—the domain of PR—more than sales collateral. Plus, the client has editorial authority—a dramatic shift in control from other collateral projects. For these reasons, case studies push many marketing professionals out of their comfort zone: "Let's see, do I try to initiate ten case studies this quarter, or should I just have a root canal?"

"What is more powerful than enabling prospects and customers to see for themselves how your product or service is working in the real world?"

Steve Slaunwhite, The Marketing Coach, www.steveslaunwhite.com

But don't be overwhelmed by these obstacles, real or perceived. Case studies bring tremendous benefits to the sales cycle. In them, buyers learn exactly how your offering is already bringing value to companies the client can relate to—sometimes even their competitors. When written well, case studies let prospects visualize themselves becoming your clients. By positioning your company as a safe and credible vendor, they make prospects comfortable to take the next step in the buying cycle. Short of a direct client reference, few sales support tools are more powerful.

> **"When I first joined Blackboard four years ago, building up our case study library was low-hanging fruit. My sales team says that case studies are the most valuable sales tool marketing has provided them."**
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> ***Lisa Plaskow, Director of Marketing Programs, ProEd Division, Blackboard, Inc.***

For a study[1] by Information Technology Services Marketing Association, researchers asked IT managers, "How would you rate the effectiveness of the following marketing vehicles in getting your attention?" Respondents chose from 16 marketing vehicles, ranging from online ads to white papers. There was a tie for first place between two vehicles:

- Speech or presentation at a conference or trade show
- Case studies describing successful customer solution implementations

A Tale of Two Companies, Chapter 1 NormalCorp, A Familiar Story

Jennifer is a marketing director at NormalCorp, a mid-sized B2B company. Her CMO, knowing the value of case studies, tells her she needs to produce 20 good ones this year to make her goals—and earn her bonus. Jennifer starts by emailing the sales team and asking for customers who would "be willing to talk." To her delight, she gets an overwhelmingly positive response from most of the reps. "Of course, they'll talk. They love me and they love us!"

But as Jennifer wades into the process and starts to reach out for interviews, she realizes things are a lot squishier than she thought. Reps are busy; many are lackadaisical in their screening and don't arrange interviews. Clients are busy, too. They want to know the questions ahead of time. They respond with questions that indicate they are unfamiliar with the process: "What magazine will the case study be printed in?" And, the most dreaded of all: "Let me check with legal."

After months of cajoling and rescheduling meetings, Jennifer ends the year with six case studies and a few more in the works. Worse, the case studies don't represent all of the most lucrative target markets. Some stories are good, but others are less than compelling. But after all the trouble, Jennifer (and her boss) are relieved to get what they have. The sales reps, however, are less than impressed.

Sound familiar?

What happened? NormalCorp certainly understands the value of case studies—that is, the value to NormalCorp. But no one thought about the value to the client. Jennifer approached the process like most companies do, as a one-time, ad hoc project where each client was essentially asked to do a favor for NormalCorp's marketing department.

What's in it for your clients? A lot…of risk?

Clients frequently resist your requests for case studies out of hand. The process often starts early when your PR department is rebuffed when asking for a "client win" press release. Once a client's executives "just say no," the marketing department is out of options within the protocol of the client-vendor relationship. The client's objections vary: competitive risks, legal risks, and branding risks top the list.

It comes down to *perceived risk.* When your marketing department requests case studies, clients assume that they are taking all the risk by going on the record to endorse your company, while you are getting all the benefit of the endorsement. That's hardly a good bargain.

It's your company's responsibility to eliminate their perceived risk by lavishing them with benefits. How?

A Tale of Two Companies, Chapter 2
BetterBiz: An Exemplary Tale

BetterBiz is NormalCorp's competitor. Rob, its marketing director, receives a pipeline report indicating that a prospect in the healthcare industry, looking to buy BetterBiz's mid-tier product, has just been upgraded to an "A" opportunity with a 90% probability to close. Contracts are being drawn up, and the prospect's executives will be in-house on Friday.

"Bingo," says Rob. "Sales needs a story for the mid-tier line in healthcare." Rob calls the sales rep to learn about the deal, the decision maker, and the prospect's needs and objectives. "The CIO has been our strongest advocate," says the sales rep. "She'll have some great quotes." Rob also contacts his Director of Professional Services, who will be in charge of implementation. He will keep Rob informed about the new client's launch plans, and how they will measure success. Rob also touches base with legal, making sure they have the standard client reference and case study language in the contract, to set expectations that this is a normal part of the client/vendor relationship. From Rob's colleagues in PR, he receives a list of healthcare industry publications that the new client will want coverage in. He briefs his boss, the CMO, to be ready to discuss opportunities with the prospect at the Friday meeting, including the user conference in April.

Ten weeks later, the prospect has become a customer. Rob has stayed informed about the implementation, and knows how BetterBiz's product has benefitted the client's company. He has also arranged an introduction with Jo, the client's Director of Corporate Communications. He calls Jo, practitioner-to-practitioner, to discuss how to publicize the success of the project. His plan: pitch an article to three healthcare pubs, submit an abstract for a healthcare conference, and present the article as a case study at next fall's BetterBiz user conference.

Sound desirable? For Rob, and for everybody?

What's happening? Rob isn't pitching a case study—he's rounding up members of a team, aligned throughout his company and the client company, touching the legal, PR, services, and executive departments. He positions the case study not as a favor the new client grants to BetterBiz, but as one item in a benefit-laden customer program.

Balance the Bargain

A concerted program of benefits frames the case study as a benefit—not a favor, and not a risky endorsement. You balance the transaction by offering visibility programs, special access, recognition, or even discounts and upgrades on services, for your mutual benefit. Under these circumstances, the client isn't going out on a limb to endorse you, but is allowing your company to deliver great customer service.

Manhattan Associates has such a program. It markets supply chain software to retail businesses, distributors, logistics service providers, and transportation companies. Their web site offers over 100 case studies—significantly more than its competitors. "Our program is called the Supply Chain Leaders program," says Mindy Kenney, director of the program. "It promotes supply chain excellence, and it promotes our customers' success. We look for ways to include our clients in conversations about the importance of supply chain to commerce, not the importance of our company to them."

In the course of more than 20 years assisting clients with case studies, we have seen B2B companies offer several benefits to their clients in conjunction with the case study:

- **Visibility:** Public relations opportunities, with the case study published in trade pubs as if it were written by the client's PR department.
- **Participation:** Speaking opportunities at industry events and your own client conference, using the case study as the subject of the presentation.
- **Financial incentives:** These have ranged from reduced fees for professional services to free upgrades.

- **Feedback:** Customer participants may serve on user panels and advisory boards, where they can contribute feedback on the product. These panels increase client participation of future product development, and build loyalty.
- **Special Access:** Customers may receive a direct line to top management at the vendor, instead of being routed through sales or account management. A letter from the CEO to introduce this benefit is a nice touch.

Typical Case Study Process	Winning Case Study Program
	Select worthwhile stories.
	Leverage the contract.
	Nurture the relationship early.
Ask the client for a favor.	Deliver the benefits.
Conduct interviews and write it.	Do all the heavy lifting.
Submit it for final editorial approval.	Make approval easy.
Wait.	
Publish on your web site.	Welcome your client to "The Club."

The Winning Program

Case study winners share a common approach: they think of the case study as a client service, as well as their own important marcom effort. As a result, they get high participation.

The differences between the typical "project" approach and a successful, organized program are not insignificant. But considering the high value of case studies to the sales force, plus the additional benefits to client relations, the rewards of a winning program outweigh the costs.

The final step, welcoming your client to "The Club," is the most important differentiator of a winning program that generates case studies. Now the client is not doing you a favor, they are doing what it takes to get the most benefit from your company.

Select Worthwhile Stories

While it is tempting—and often expedient—to do a case study on every client who is willing to comply, case study winners select their subjects strategically. "I look for case studies that focus where our sales team wants to focus," says Marie Melchiorre, Director of Marketing and Communications at Tenrox, a leading provider of project management software and workforce management solutions. "It's my job to make sure that Sales has an abundance of stories to back them up."

Connect with Customer Service

Tenrox's case studies are launched through the Customer Service team, where the client relationship is rooted. "We work with the project managers, who know the status of the implementation and are working directly with the client," says Melchiorre. "I identify customers who are willing to do case studies from the Implementation Status Reports."

The Tenrox approach leverages the strong professional relationship that their own project manager builds with their client's stakeholders. "The PMs have a mandate to make sure our clients are happy," says Melchiorre. "We're all successful when we support that relationship."

Leverage the Contract

B2B companies have the advantage of the contract to set the stage for collaboration in future PR and marketing materials. A common approach is a clause for a press release to announce the purchase. However, clients frequently reject a clause for a case study, because such a request is premature at signing. Leverage the contract to get the collaboration started, proposing activities that are appropriate for a new business relationship. Once the client is satisfied with your performance, it will be time to ask for the case study.

Nurture the Relationship Early, But Don't Try to get Married on the First Date

Case study winners have strong communications with their customer-facing colleagues, so that marketing can identify a case study opportunity—sometimes while the subject is still in the pipeline.

"Companies aren't reference-able, people are referenceable."

Lisa Plaskow, Director of Marketing Programs, ProEd Division, Blackboard, Inc.

"The process starts even before the deal is signed," says Lisa Plaskow of Blackboard, Inc., a leading provider of online learning software. "I work with sales managers to identify organizations that will lend themselves to the best case studies. Companies aren't referenceable, people are referenceable. Sales can help me find people who are personable and are willing to talk. It's better to know that up front instead of having to chase people down."

Case study winners communicate regularly with their sales reps, and know which opportunities, both for revenue and for case studies, are coming through the pipeline. They receive sales reports, attend sales briefings, educate themselves on the prospect's goals, and even meet the prospects before they become clients. This approach brings marketing into alliance with PR, since both teams are looking for the same opportunities.

In many cases, planning the case study and other projects in cooperation with the client's PR or marketing department will set the right tone for the new relationship. "Get to the right person in corporate communications on the client side, and demonstrate that you're positioning them," advises Kenney. Manhattan Associates' PR department has relationships with supply chain industry publications that are not always accessible to their clients. "We augment their PR efforts to make them look better. Our client doesn't care where the article comes from," she says.

There is an important distinction between beginning a relationship with a client and asking for permission to write a case study immediately. Case study winners understand this distinction. Rather than "talk about marriage on the first date," wait until the client is in a position to endorse your product or service. Your patience will reduce the risk they perceive, and increase your chances of a fast approval cycle. What's more, your company's implementation services team or customer support department will be able to provide useful information about the client's experience with your company, success with your product, and willingness to be interviewed for a case study.

Deliver the Benefits

When the time is right, initiate your marketing department's component of the service program, of which the case study is a piece. The right time is generally after the client has had time to measure and realize success with your company's offering.

Then, demonstrate your company's commitment to its clients by writing the case study to glorify them, not you. "We make the case study about the client. It's their story and their success." says Blackboard's Plaskow. "The case study is not about our software."

"It's not important they talk about Manhattan Associates' solutions," says Kenney. "We want them to talk about the fact they have 99.9% inventory accuracy, or 25% increased sales. If they talk about the impact of having a world-class supply chain, then we win."

Remember, too, that some clients will be more comfortable granting a case study when they have a better story—which may be months or years into the relationship. Use the program to keep in touch with clients on a long-term basis to reap long-term rewards for both sides. For example, Manhattan Associates goes back to clients a year or two after a case study is first published to obtain updated benefits, quotes, and anecdotes.

Do All the Heavy Lifting

As in all services to your client, the professional execution of the case study speaks volumes to your client. By doing all of the hardest work up front, in a spirit of service, you greatly increase your chances of getting editorial approval with minimum resistance.

To reduce the client's perceived risk and burden, state up front how easy the process will be for them—and follow through. "It helps to be clear with the client, up front, about what you're saying," says Plaskow. "It's our job to make the process as easy as possible for them. We do all the heavy lifting. We're always aware that the client gets final approval of the case study."

Plan to lead the effort in every aspect of the project. Overall, be mindful of the case study as a service to the client.

- **Know the decision maker.** Talk to the decision maker *before* you write the case study. The decision maker is usually not a subject-matter expert, but an executive. Take responsibility for your part in managing the client relationship; don't surprise the decision maker with your written draft.
- **Give over control.** Assure the decision maker that while you will provide a complete draft, they will have final editorial control.
- **State your objectives up front.** Coordinate these with the client's marketing and PR teams; think of it is as their piece. Provide questions or an outline in advance to make the interviewees comfortable with the process.
- **Initiate all contacts with people on the client side.** Don't give unnecessary administrative tasks to the client.
- **Write the *client's* story.** This approach makes the case study more palatable for your client, and more readable for prospects, because it becomes a story of leadership instead of a sales pitch.
- **Schedule interviews and photo shoots to the client's convenience.** Travel to the client site if necessary.

Get On Board with the Client's Brand

The decision maker wants to make sure that your case study supports their brand. One marketing professional tells the story of a high-tech company that wrote a case study for a beverage client with a huge advertising budget. Although the case study accurately told the story of a sophisticated data communications network that linked all the company's offices, plants, and distributors, the client's legal department ultimately tuned down the story. Their reasoning: "We spend millions of dollars each year convincing people that this product is handmade by little old men bending over oak casks. The last thing we need is a technology story!"

Make Approval Easy

With enough communication up front, the client's approval of the case study will be easy, not the horrific roadblock of marketing legend. Approval goes faster when the client has few surprises: the objectives are already known, the presentation is professional and supports the client's brand, and all the administrative tasks are already taken care of.

Remember the Golden Rule of fast-track approvals: write every case study from the point of view of the client, not your own company. "It's all about them," says Kenney. "It's about their leadership, their intelligence, and how they are increasing their shareholder value. We write it in a way that makes the client the hero."

The B-to-A Method

There is no doubt that anonymous or generic case studies have less value than case studies with your client's public endorsement, but they do tell a story that can be useful in the sales cycle. For that reason many companies do use them. Kent Evans of Louisville, Kentucky-based Summit Energy has an interesting approach. Using only his own sales or account management teams' input, he creates the "B" level generic case study which is deployed to sales right away. But then he also creates an "A" version, making some educated guesses and attributing some comments to the client. He shows the "A" version to the client to encourage them to participate. According to Evans, "The success we have with this approach is amazing. Almost one-third of the 'Bs' turn to 'As,' and we 'make hay' with the Bs right away. Plus, when the clients see the case study take shape even before they have engaged in the process, the case study is demystified and they feel more comfortable with it."

Welcome Your Client to "The Club"

The final step in the program is to deliver the benefits, and grant your client the elite status they deserve. That means following through on the benefits of your program. These might include service upgrades, public relations opportunities, speaking engagements, and special participation in your company's development efforts.

A creative approach, including travel perks, gifts, or awards, may entice clients to "join the club." Consider the Crown Room from Delta Airlines or the American Express Rewards Plus program as examples.

But don't underestimate the value of simple recognition. For example, at Manhattan Associates, this means publicly naming their participating client as a Supply Chain Leader. Like any other award, companies will make extra effort to gain recognition.

Whatever the mix of rewards and recognition you offer your case study participants, make it worth their while. Satisfied customers who feel respected by their vendors will reciprocate with more endorsements, references, and even evangelism that can't be bought at any price.

Your Clients Can Use Your Case Study

Winning case studies become assets for the client in their own right. "Our clients use our case studies in different ways," says Lisa Plaskow of Blackboard, Inc. "Our clients use case studies we write to show their prospective students the cutting-edge technology that will deliver their learning. A lot of students know Blackboard. The case study is a good way to attract not just students, but also faculty and subject-matter experts."

The Beginning of a Beautiful Relationship

Winning companies understand that when your prospect becomes a client, it's not the end of their buying cycle—it's the beginning of the most important phase. Every phase of the buying cycle requires a different approach in marketing content,[2] and content for the client should be exclusive, to reinforce your relationship.

If you truly believe in your company's brand promise, then you can stand behind a customer relationship program like the ones we have described here. In such a program, you reinforce the assertion that your client will gain a competitive advantage by using your product—and you're ready to prove it. In such a program, you work alongside your clients, so lines like "we partner with our clients" have real meaning.

Blackboard, Tenrox, Manhattan Associates and Summit Energy are just a few of a growing number of companies who are including the marketing case study as a part of their total customer experience. For example, to understand Manhattan Associates' commitment, one need only refer to Mindy Kenney's title: Director of Customer Leadership Marketing.

"It's a matter of building that relationship into the client lifecycle," she says. "That's what we mean by Leadership Marketing."

By positioning their clients as leaders, these marketers are leaders in their own right. Their success stories are the stories of their clients.

About The Content Factor

The Content Factor is a team of experienced, web-literate content creators. Our goal is to help our clients do better marketing through better content. We can be reached at **www.contentfactor.com** or **770-457-2489, ext. 227**

If you would like an outside opinion of any part of your case study program, give The Content Factor a call. We can help you evaluate the quality of your case studies—and suggest how to improve it.

[1] ITSMA, "How Customers Choose Solutions Providers." 2007.

[2] See The Content Factor's white paper, "How to Create a Content Strategy for B2B Nurturing Campaigns" at http://bit.ly/bIrV00 to learn about content strategies for all phases of the B2B buying cycle.