



# How 1 Case Study = 3 Wins

By Leslie A. Blaize, CPSM

A/E/C firms continually look for ways to differentiate themselves. Case studies can provide an important step toward achieving that goal.

Turbocharge your project profiles to create compelling case studies. Use them to highlight your strategic initiatives and go beyond standard testimonials to provide third-party verification. Add them to your marketing toolbox, and you'll find countless ways to repurpose their content. And what's more, each case study provides three distinct wins.

## Win #1

As a professional services firm, you can use case studies, often called success stories, to clarify how you solved your client's problem. They had a challenge, you offered an appropriate solution, and now they're enjoying a measurable result. When possible, the case study should cite the specific metrics that show how your solution helped improve the situation.

Once completed, you can use case studies in many ways to further marketing and business development:

- Include in proposals, either in their entirety or pull out key quotes or metrics
- Share with business development personnel or seller-doers, who can distribute them to prospects
- Dissect the content into a Q&A blog post for your newsletter or website
- Use as the basis of a brief video featuring your happy client

## Win #2

At the heart of any case study is the happy client, who will obtain some positive publicity to build

recognition for the project and firm. They also receive acknowledgment for solving a problem.

So, how do you get the client on board? During the contract stage of a strategic project, you may be able to identify potential interview subjects. You could plant the seed for a future case study, or even include it as part of the contract, if appropriate. More often, an enthusiastic client may offer a testimonial about your firm's work. At that point, you could take the next step and ask if they would agree to participate in a case study.

Here are some caveats. Before beginning, make sure management agrees to the case study. Assure the happy client that participation will only require up to 45 minutes for an interview and draft review. An internal writer or freelancer will want to make sure participants agree to the approval process, so there are no surprises. The worst-case scenario would be for a near-final draft to run into roadblocks from someone in the client's organization.

## Win #3

Prospective clients also receive benefits from each case study. Picture their dilemma. This public official or business owner faces a big decision. They know they'll need to hire at least one A/E/C firm. If the project runs into trouble, they'll face unpleasant consequences from their boss, the public, or the boardroom. They'll use the typical proposal/interview process but would like more insights.

Case studies can help prospects as they start looking for potential answers to their challenges. These documents provide third-party verification of what it's like to work with a specific A/E/C firm. Prospects may share the same challenges as the happy client and could learn about potential solutions.

Many proposals include references, but this could result in unexpected challenges. What if the contact isn't available or doesn't emphasize essential points



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in a brief call with a prospect? The source might not remember key metrics or the challenges they faced before project completion. A case study clearly states those points.

Author Casey Hibbard of Compelling Cases, Inc., comments on the benefits of case studies, “For buyers looking to hire professional services firms—especially for expensive, lengthy projects—customer case studies provide critical peace of mind.” She adds, “They show how you deliver on time, on budget, and per the client’s specific needs—helping buyers choose you in a competitive market.”

### Bonus Win: The Value of Trusted Partnerships Increases

Case studies demonstrate the value of collaboration in an easy-to-consume story format. You learn of a happy client’s challenges, the solution, and the positive outcome. Like a good movie, the satisfied client—the hero—faces obstacles, but finds a way to overcome them, in partnership with an A/E/C firm.

Besides a good storyline, case studies also can include metrics about the project. A sidebar could list additional project details, awards, grants, or partners.

The latest Deloitte CMO Survey supports the value of trusted relationships. The special edition, entitled *COVID-19 and the State of Marketing*, was produced in June 2020 with the American Marketing Association as one of the sponsors. The study “offers forward-looking insights regarding customer behavior, economic forecasts, and managing growth during these uncertain times.”

Study results show that in February 2009, 19.9% of the customers ranked trusting

partnerships as their top priority. In June 2020, that ranking jumped to 29.3%, just under the top priority of low price.

### Engage the Reader With a Good Story

The Deloitte CMO study reveals that customers prioritize dealing with people they trust after spending months dealing with the pandemic’s disruptions. Engaging case studies show how your organization works with customers to make their lives better. And as a bonus, they build internal pride in your organization and provide the basis for promotional content.

Karl Feldman, partner at Hinge, in Reston, VA, says that writing a compelling success story isn’t easy. Feldman explains, “A good case story requires your client’s involvement, stats that back up a good narrative, imagery that encourages people to take notice, and the right keywords.” But he notes, “It’s well worth the effort and resources because it plays an important role in your content marketing strategy, from the top of the funnel down to its tip.”

Feldman adds, “Done well, your case story will help you draw new prospects and close more business by providing a track record people can easily find online of the work you can do and the results you can achieve.”

In the year ahead, how will you promote a strategic initiative to stand out from the crowd? Go beyond the recitation of a project’s details. Instead, highlight your client’s challenges and concerns through a case study. Let your clients tell their authentic stories. You may discover new insights about how clients perceive your value. And what’s more, a prospect will learn why they should select your firm for their next project. ■

■ **Editor’s note:** Read “Your Employer Brand and Culture Have Never Been More Important,” by Hinge’s Karl Feldman and Katy Pultz, on page 30.



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