Rattleback®

The Case Study Handbook

A Comprehensive Guide to Developing Unbelievable Client Stories that Lead Prospects to Action

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Chapter 1:

The Case for Case Studies

While almost every firm agrees they need case studies, they don't often question *why*. Why do case studies matter?

Case studies play a critical role in the buying process for most clients. But clients use them in different ways at different points in their journey. In this chapter we explore the different ways clients use case studies to make informed business decisions.

To start, we'll look at the early-stage buyer. In the early stages of their buying journey clients find themselves in learning mode. They're struggling through a challenging issue. And they're looking for ideas, suggestions, and perspective on how to diagnose and solve it.

At some point during that process, they also start to seek out potential firms that can jump in and steer them to a game-changing solution. Sometimes these activities occur together (*I have an employee engagement problem...what do I do about it?...Oh, this firm GETS it. We need them on our side.*) Other times, the learner already knows how they want to solve a problem but needs the right partner to make it happen. One thing is certain: Nothing gives the learner more confidence than hearing the story of someone who's been in their shoes and successfully come out on the other side.

Learners look for three things in a client story:

1. The challenge one of their peers faced
2. The solution they adopted
3. The results they achieved

They want to find out if the solution would be a good match for their unique challenge. Noted business development consultant, Blair Enns, likes to say, "No vision. No decision." They're looking for a vision of a better reality — both for their company and for them.

Eventually, learning mode switches to buying mode. At this point, the buyer wants to move forward with solving their issue, so they use case studies to figure out what it's going to cost (in money, time and resources) to solve the issue, and how long it might take. They want reassurance your firm is the right fit to solve their challenge. Often, these are the case studies clients consume after they have a few conversations with you.

Buyers look for a few more things in a client story:

- How your POV and expertise matches up with a solution to their needs.
- What to expect when working with your firm.
- How you would help them overcome their challenge (i.e. a light summary of your process).
- A client's perspective on the experience of working with your firm (often in the form of a testimonial).
- Your perspective on the engagement, allowing them a deeper dive into how you think and solve problems.

It's always important to remember, you can't really sell a professional service. A client buys a service when they're ready. I know that sounds defeating, but it doesn't have to be.

You have control over how you present your firm, your POV, and your unique solutions. All of that ladders up to trust. Your job isn't to convince learners to become buyers; it's to educate and inspire them along their journey so that when they are ready to buy, they think of you first.

THE PROBLEM WITH MOST CASE STUDIES

A great case study allows your potential clients to place themselves in the shoes of your existing or past clients and ride along next to them through their journey. In so doing, it lets them associate their challenges with another organization like theirs, envision their own potential journey, and imagine their desired future reality. Now, I hope you notice what's conspicuously absent here — your firm!

Historically, firms use case studies to demonstrate their ability to diagnose problems and develop impactful solutions — they position themselves as the hero and the client as a passive bystander in their own future reality.

The 3 problems with traditional case studies:

1. **They make your client look bad.**
   By shining the spotlight on all your client's problems, you present them as an organization in disarray that was only saved by a larger-than-life superhero (your firm). No client thinks of themselves this way nor wants to be presented this way.

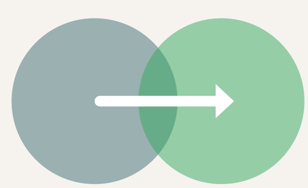
2. **Potential clients don't feel like they're part of the story.**
   A story told from your point-of-view is not relatable to your potential clients. You're asking them to jump into your shoes, which they have no need or desire to do.

3. **They're hard to get.**
   This is a direct extension of the first problem. No client wants to publish their organization's faults.

A client story flips this antiquated notion on its head and shifts the focus away from your firm to your client. Stories told from your clients' point-of-view provide best practice examples for how they navigated through difficult challenges and achieved a desired future reality.

We recommend using one of two classic story archetypes (more on that in the next chapter) to tell client-centered stories. Either one is used to present your client as a hero facing down a great evil or embarking on a long quest. *Your firm* is cast as the resource used to vanquish the enemy or arrive at the destination. *Your firm* provides confidence, tools, resources, advice, and support on the journey. *Your firm* exists to empower your clients' success, not provide it. It's easy to see why clients would be more interested and more willing to have their story told in this way.

When you shift your lens from firm-centric case studies to client-centric client stories you provide yourself with an opportunity to vanquish your own evil — to replace that long list of unnamed case studies with a handful of high-quality named *client stories*.



Chapter 2:

The Better Way to Develop Case Studies That Work

No one wants to work from a template. That said, bringing just a little structure to your thinking will make developing high quality case studies much easier.

Over the years we've found it useful to use a few classic story plots to help us develop high quality client stories. For this chapter, we draw from the 2004 book, *The Seven Basic Plots*, by Christopher Booker. Specifically, we lean on two classic story archetypes he highlights in his book.

1. THE QUEST

"Similar to [a] hero's journey, the quest is about progression. A protagonist stumbles across several obstacles or challenges that must be overcome to progress along the journey."

In the context of a case study, the elements of a quest are:

- Protagonist = Your client.
- Progression = Your client's big picture or stated business objective.
- Obstacles = The numerous challenges faced along the way, which the client hired your firm to help overcome.
- Journey = The destination realized with your firm's guidance, direction, and support, and your firm's expertise, process, and experience.

2. OVERCOMING THE MONSTER

"It's the underdog story in which a hero is confronted by an evil larger than themselves. To defeat this evil or overcome fear, the [hero] requires great courage and strength."

In the context of a case study, the elements of this story are:

- Hero = Your client.
- Evil = A large, seemingly insurmountable challenge faced by the client.
- Courage and strength = Your firm.

YOUR FIRM IS RARELY THE PROTAGONIST OR THE HERO

As stated in the previous chapter, most firms have a propensity to use case studies to try and dazzle potential clients with their brilliance. "Our process is superior. Our expertise is deeper. Our experience is unusual. And it all results in higher-performing outcomes for you. Greater cost savings. Faster time to market. Yadda. Yadda. Yadda".

But here's the thing: when we read a great story — when we're really engrossed in it — we live inside of it. We feel all the highs of success. And all the lows of failure. There's a reason we watch Hoosiers again and again. There's a reason we get chills every time "a school this small wins the state championship." That reason is because we like to ride alongside the hero. We empathize with them. We root for them. We want to be them.

If we're going to turn our "case studies" into "client stories" and make them powerful pieces of marketing, we need to cast them from the perspective of the client. The client is the hero. Your firm provides courage and strength. The client is the protagonist. Your firm guides them over obstacles and to the destination of their journey.

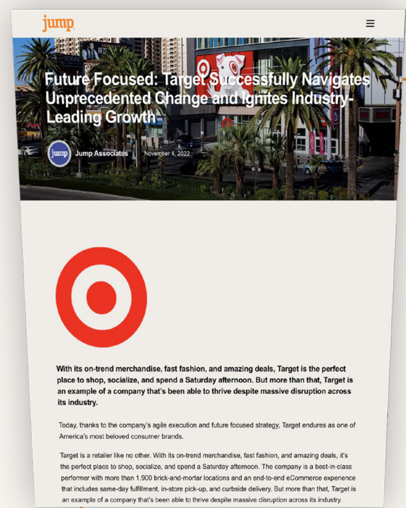
Best in Class:

JUMP ASSOCIATES

Jump Associates, a Rattleback client based in Silicon Valley, puts all these storytelling devices, and more, into effect in the explanations of their client work. Jump is the world's leading independent strategy firm. It works with some of the world's most admired companies. The leadership team uses its client stories to showcase the impact they have through their client work and as stories for anyone to learn from.

Jump + Target

It's no small feat to tell the story of a decade-long engagement — and one that describes corporate transformation no less. But this story nails it.


jump

Future Focused: Target Successfully Navigates Unprecedented Change and Ignites Industry-Leading Growth

Jump Associates | November 4, 2022

With its on-trend merchandise, fast fashion, and amazing deals, Target is the perfect place to shop, socialize, and spend a Saturday afternoon. But more than that, Target is an example of a company that's been able to thrive despite massive disruption across its industry.

Today, thanks to the company's agile execution and future focused strategy, Target endures as one of America's most beloved consumer brands.

Target is a retailer like no other. With its on-trend merchandise, fast fashion, and amazing deals, it's the perfect place to shop, socialize, and spend a Saturday afternoon. The company is a best-in-class performer with more than 1,900 brick-and-mortar locations and an end-to-end eCommerce experience that includes same-day fulfillment, in-store pick-up, and curbside delivery. But more than that, Target is an example of a company that's been able to thrive despite massive disruption across its industry.

Target is the lead actor here, with Jump confidently playing the supporting role. We learn how Target faced disruption (a failed entrance in the Canadian market, competition from Amazon, falling stock prices), what corporate leadership did to overcome it (invested in insight-driven research and future focused strategy), and how the company achieved extraordinary success as a result of their efforts (+162% growth in share price). To top it all off, the case study ends with actionable insights — lessons executives in other companies can take away from their time reading the story.

Jump + Universal Music Group

Target isn't the only household name Jump has guided to success. In this story of the firm's partnership with Universal Music Group (UMG), Jump describes how the entire music industry faced an inflection point when file-sharing services like Napster disrupted the status quo. It describes how UMG executives relied on their deep understanding of who they are and took a future-focused approach to strategy to navigate to better days.

The client story presents UMG as the quarterback taking the team down the field, with Jump as the inspirational coach on the sidelines helping to call the plays. It elegantly weaves together the lead-up to UMG seeking help and how corporate leadership navigated a critical period in the company's history to come out the other side. It takes us step-by-step through their journey (without giving too much away) while highlighting remarkable business results in the end.

This line says it all: "Universal's IPO debuted as the largest in the history of the music business, signaling not just how far it had come, but also its leadership's ability to innovate with a clear future vision."

Chapter 3:

The Brass Tacks – 6 Key Ingredients to Include Before You Publish

"Do you have an example of that?" It's the most common question clients ask when interviewing firms they might hire.

The reason for the question is obvious. Clients are looking for stories that bring the value of your solutions to life.

Specifically, they want to hear the details of how a client successfully used your services to drive tangible, measurable results in their own business. There's no better way to validate your company's point-of-view than with a great client story. Here are the six components every good case study should use to make your clients' successes as relatable as possible.

1 SUMMARY STATEMENT: GIVE THE CLIFFS NOTES VERSION OF THE STORY

Provide a brief snapshot of your client's story—problem, solution, and outcome—in a few sentences or a brief paragraph. Readers can get the key points and decide if they want to dive in and read the full case study.

2 ORGANIZATIONAL SUMMARY: POSITION YOUR CLIENT AS THE HERO

In a sidebar or callout, tell a little bit more about your client and their story. What industry do they operate in? Who do they serve? Where are they located? And how big is their organization? Remember that your client is the ultimate hero in this story. You want to show what makes your client great.

3 PROBLEM STATEMENT: SETUP THE SITUATION

Use this section to frame the challenges facing your client. Be sure to include details or context around any issues complicating the situation. Aim to do this in about 50 to 100 words. Be sure to tell the story from your client's point-of-view. This will help your prospects better relate to the story, especially if they are facing similar challenges in their own businesses. If possible, include a client quote or even a brief video snippet where the client describes the challenges in their own words.

4 SOLUTION DESCRIPTION: DESCRIBE THE RESOLUTION, WITH YOUR CLIENT LEADING THE WAY

This is the meat of your client story and will include the details about how your solution was developed and delivered. Aim to keep this section to about 200 to 300 words.

This section is where it's trickiest to keep your client positioned as the hero since you'll obviously want to include specific details about the unique aspects of your solution and emphasize the merits of your company's approach and point-of-view. You can do all those things—and keep your client front and center. The key is to celebrate the client's smart choice in selecting you and your services. Again, a quote or video snippet will work well here to highlight your client's rationale for believing your solution would be the right answer to their company's problems. You can also talk about any collaboration between you and the client. And, if possible, you can discuss how your services fit into the client's bigger-picture strategy for tackling the issue.

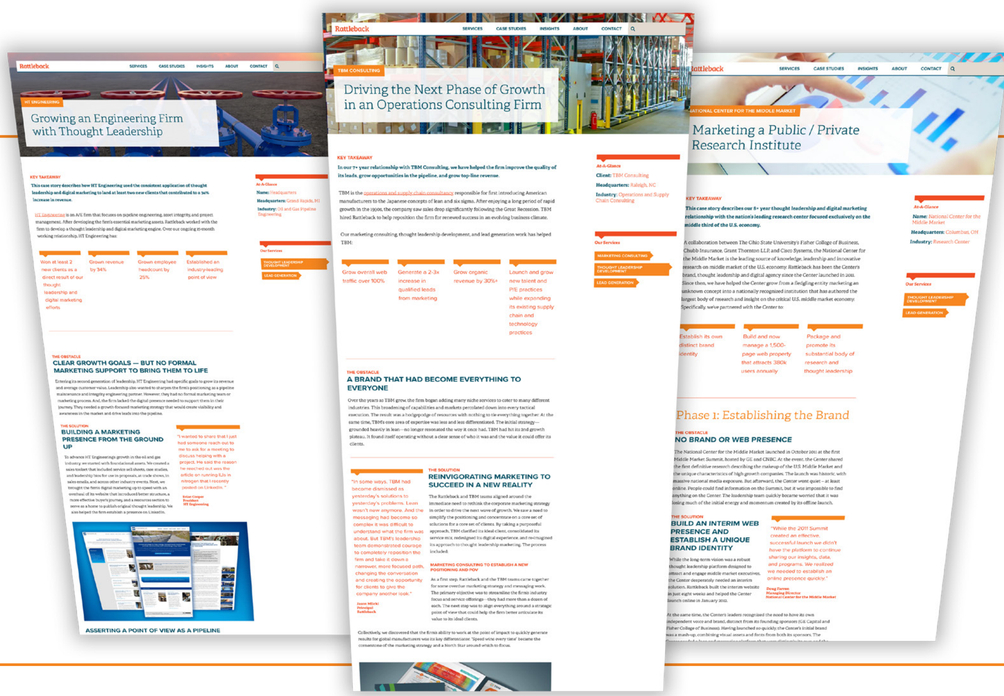
The solution section is also a great place to ensure your case story is visually interesting. Include images, graphics, visuals, or flow charts that help paint the picture of how the solution worked for your client.

5 OUTCOMES: MAKE THE RESULTS POP

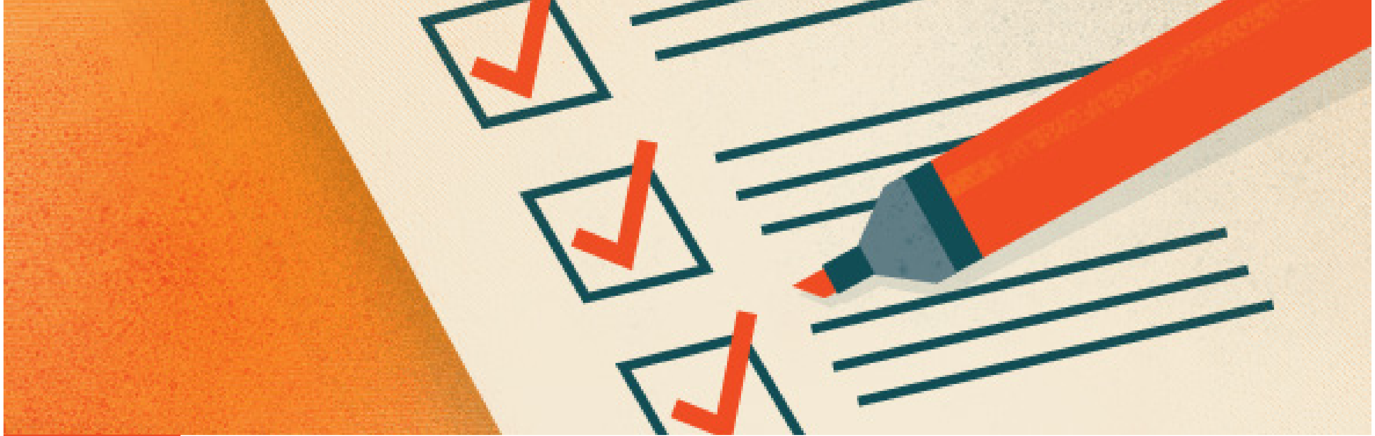
Finish your client story on a strong note by emphasizing the results. Include data to quantify the impact—such as how many dollars were saved, or new revenue growth. We like to use bullet points or other visual cues here to give the information in a bite-sized fashion and make the numbers and their significance really pop. You can also include another client quote or a video that helps validate your client's decision to hire you.

6 CALL-TO-ACTION (CTA): KEEP THE CONVERSATION GOING

Finally, do not forget to invite your readers to continue exploring your solutions. For web versions of case studies, include a contact form for the firm. For print versions, include information about your firm along with contact information for your team to make it easy for your prospects to connect with you.



Check out some of Rattleback's case studies



Chapter 4:

Picking the Right Clients

Here's the good news – you don't need hundreds of case studies.

When firms read, and see, our thinking on case studies they frequently get overwhelmed. They're used to having lots of short "project profiles" that they publish all the time. There's not necessarily anything wrong with that. They're just not as helpful to your clients as an in-depth story. Most mid-sized firms only need a handful of great stories. This is especially true if your goal, as a firm, is to sell larger, transformative relationships. Here are four ways to think about which client stories you'd like to feature:

1 PRESENT PROBLEMS YOU WANT TO SOLVE REGULARLY

This is obvious, but often overlooked. Frequently, we find firms presenting case stories that don't appear to have alignment to the type of work they really want to do and the types of clients they'd like to work with. There can be a few reasons this happens. Maybe the case stories are out-of-date. Or maybe they are examples of tactical work for high profile clients (therefore deemed valuable). Or maybe the firm is transitioning to different markets. Regardless, there should be a direct correlation between the types of work you present in your client stories and the types of work you'd like to be hired to do.

2 USE PROPER SCOPE AND SCALE

For one reason or another, we find firms struggle to share the whole breadth and depth of their client relationships. While there's surely truth to the fact that some clients want to hire point solutions, this doesn't make it appropriate to present your work as a portfolio of them. Tell the stories that represent the scale of a relationship you'd like to have with new clients. Of course, a lot of client relationships will start with a specific problem and a point solution to it. Tell that part of the engagement, but still tell the broader story whenever possible. 2-3 stories at the right scope and scale are far better than 20-25 tactical projects.

3 HIGHLIGHT RECOGNIZABLE CLIENTS

This criterion is obvious and self-explanatory. But it doesn't mean that if you can't feature your work with Apple, IBM or GE you're sunk. It simply means that if you have two potential stories to tell that are similar in nature, then generally, the one with the higher profile company is the better place to start.

4 RECRUIT CLIENTS THAT ARE OPEN TO SHARING

Featuring unnamed case studies in your outward marketing does you no good. If you find yourself simply unable (or unwilling to do the hard work necessary) to identify clients that are willing to come forward to tell their stories, then you'd probably be better off using the "McKinsey clause" — make a broad statement that says your work is highly confidential and thus it's your practice not to share any of it.

Leverage the Power of Client Stories

What are you waiting for?

It's our experience that every firm has a handful of clients who are willing to tell their success stories. Firms are just reticent to ask or tend to ask the wrong way — they ask for a case study of their great work rather than a client story showcasing their client's success as an example of best practices.

If you have stories you haven't shared yet, now's the time to put them out there. And give your clients — and yourself — credit for the great work you do.

ABOUT THE AUTHOR

Jason Mlicki, Principal at Rattleback, has been advising professional services firms on marketing matters for over 20 years. He writes about growth strategies, thought leadership development and lead generation on his agency website, Rattleback.com. Also, he co-produces the professional services marketing podcast, *Rattle & Pedal*.

ABOUT RATTLEBACK

Rattleback provides growth consulting, thought leadership development, and lead generation for professional services firms. We help business and marketing leaders envision and realize the desired future state for their firms. We have worked with a wide range of both middle market, and notable tier one firms such as Infosys, Jump Associates, L.E.K. Consulting, Publicis Sapient, Stantec, and Dale Carnegie.

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