

The background features a detailed exploded view of a mechanical gear assembly. At the top, a large gear is shown with its shaft and several smaller gears of varying sizes arranged in a line to its left. To the right, another large gear is partially visible. At the bottom, there are more gears and shafts, including a large gear with a wide face and a smaller gear with a narrow face. The entire scene is rendered in a dark, monochromatic style with white outlines and a small orange horizontal line above the text.

Case Study Starter Kit

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Case studies are an essential part of your industrial marketing toolbox — and a well thought-out case study will help convince potential clients you’re right for their upcoming projects. Use this starter kit to select and write a quality case study that will showcase your profound expertise in a way that resonates with customers.

PROJECT SELECTION CHECKLIST

- This is the type of work we want to complete in the future.
- There is a distinctive problem we solve and / or a unique solution to discuss.
- There is enough verified information about the project’s problem, solution and results to create a substantial piece of content.

THE BODY COPY INTERVIEW QUESTIONS

THE PROBLEM	
Describe the demographics of the customer you worked with.	
Describe the problem the customer needed solving.	
What were the hard costs for the customer if the problem wasn’t addressed?	
What were the soft costs for the customer if the problem wasn’t addressed?	

THE SOLUTION

Describe the solution in detail.

Was there a bidding process for the job? If yes, why were you chosen for the job?

What customer personnel did you work with for the projects?

What members of your team worked on the project?

What were expected and / or unexpected challenges of the job? How did you overcome them?

What did you bring to the job that a competitor couldn't have done?

THE RESULTS

What was the end result of the project?

Describe the short-term benefits of your solution.

Describe the long-term benefits of your solution.

Use the responses from each section to write a compelling, cohesive narrative for the case study. Keep these pointers in mind when writing:

WRITING REMINDERS

- Employ specific, descriptive language.
- Utilize statistics / figures when applicable.
- Avoid internal jargon that will alienate / confuse readers.
- Don't worry about word count / length.
- Maintain a customer-centric mindset while writing.

HEADLINE WORKSPACE

Start with this formula to generate ideas for a case study headline:

How a **[insert brief solution descriptor]** led to
[insert result, either a figure or high-level improvement]
at a **[insert customer business descriptor]**

Now use this space to workshop your headline:

ASSET CHECKLIST

- Photos.
- Technical drawings, charts, graphs or reports from the project.
- Customer quotes.
- Video footage of customer testimonial.
- Video footage of project.