



# Client/customer case study

## TEMPLATE

B2B  
MARKETING  
TEMPLATE



**Case studies** allow you to showcase your best and most successful work, so they are definitely worth spending time on. If you're not sure where to start, this template will help you to make sure you're answering the right questions to create case studies showing off your brand in the best possible light.

### Background

# 1.

- 1.1 Client background:** what does your client do? What product/service do they provide? Who are their customers and what problems do they solve for them? What is their business mission?
- 1.2 Their challenge:** what were the business challenges your client was facing? What was the problem they needed you to provide a solution to? Be specific about this: identify the pain points, the barriers, the opportunities that they needed to address.



### Engagement

# 2.

- 2.1 Why did they choose your product/service/solution?** Outline the selection process your client followed. What key selection criteria did they impose? How many suppliers were considered, and over what period of time? Most importantly, why did they choose you? What were the deciding factors? What made you stand out for them, above your competitors and the other market players?
- 2.2 How did you engage with the client through the sales process?** What was your pre-selection sales engagement process? Did you provide a face-to-face pitch, a written proposal, an RFP response, creative, or a technical specification? Did you provide references, a scoping workshop, a mile-stoned and costed plan?
- 2.3 How did you engage with the client through your account management process?** Be specific about your account management structure, and how it benefitted the client.
- 2.4 What deliverables were agreed?**





## Solution

### 3.

- 3.1 How is the client using your product/service/solution?** How have they implemented it to fit their business model/customer needs/specific challenges?
- 3.2 What difference has your product/service/solution made to the way they do business?** How are they using your solution to solve their business challenge? How are you helping them with this? What has changed in the way they do things? Which pain points and hurdles have been overcome?
- 3.3 What is the client's favourite thing about the solution you provide them with, and their favourite thing about working with you as a supplier?** Ask the client what they consider to be the top three features of your solution, and the top two benefits.



## Results

### 4.

- 4.1 What metrics were used to measure success in this case?** What were the KPIs and critical success factors?
- 4.2 What were the results?** Ask where possible for hard numbers from your client: before and after stats to demonstrate the change and success you have delivered. It may be preferable to use percentages and trend figures rather than hard numbers, to tell the success story.
- 4.3 Find the human-interest story too.** It's important to have a human side to the case study, alongside the numbers. For example: 'Due to the production efficiencies delivered by your solution, the client's foreman no longer has to work weekends'.
- 5. The next steps.** Do you have a plan in place to help your client grow their business even further? What else can your solution help them to do? How does the future look for your client, now they have your solution in place?

