



Brainstorming Guide: How to Write a Case Study

Step One: Determine the customer persona

Who is your target audience? What message will mean the most to the people we are targeting with this case study?

What are their business challenges we can solve?

Which industries do these people represent?

Who are the key people making buying decisions?

Do we have more than one buyer persona for this project? If so, who are they?



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Step Two: The internal process

Which teams and specific individuals will need to be involved in creating the case-study?

What part of the process will each of these teams be in charge of completing?

Will any outside vendors or teams need to be brought in to help complete this project?

What does the timeline for project completion look like?

Where will your team publicize the project after it's completed?



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Step Three: Deciding who to feature in your case study

Brainstorm three clients you've worked with that you think would make a good case-study subject

What products/services of yours do these customer use? Do those align with the products you're trying to promote using this case study?

How recognizable is your client in their industry? Are they leaders in the industry or unknown? Will featuring them in a case-study lend you credibility?

What actionable and specific results were achieved by working with this client? How much data do you have about the success of your project with them?

Which contacts at this company will you be speaking to for the case-study?