FIVE THINGS THAT UNDERMINE THE EFFECTIVENESS OF B2B CASE STUDIES

by

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INTRODUCTION

My maternal grandma was a great storyteller. She'd grown up in Africa in an era when oral tradition was the preferred mode of transmitting crucial information from one generation to the next. When grandma would visit my parents, there was always excitement in the house.

Every evening, my siblings, cousins and I would promptly complete our household chores and school homework because nighttime was grandma's story-telling time. Chores done, we'd all eagerly gather around her, and then she'd begin. Her tone, the suspenseful pauses, her Q&A, and of course, the songs, all meshed to create an engaging, priceless experience for us all. We always wanted more.

Yes, a good story is memorable. It makes the case for well-written case studies as viable marketing tools.

The primary purpose of a case study is to tell a success story. A good success story is factual, meaning that its claims are verifiable. Ultimately, the persuasiveness of a business case study as a marketing tool depends on its credibility. Pure and simple.

Unfortunately, it is very easy to undermine the impact of an otherwise credible story.

This report highlights five common practices that could erode the marketing impact of a business case study.

THE ONE-SIZE-FITS ALL APPROACH

Using one case study to "solve" multiple problems undermines the impact of the report. This point may appear as a no-brainer, but it is probably one of the most common case study mistakes. There's a strong temptation to "include everything" possible in one report.

However, in the interest of a clear focus, resist the temptation of a one-size fits all approach.

It is rarely necessary to tell a business reader *everything* about a subject matter in one document. More importantly, the objective of most business case studies is to initiate contact with prospects.

Here are a few tips to ensure that the case study reflects a sharp focus:

- Before developing the case study, conduct a thorough audience analysis. Is the report targeting technical readers, management, or a mix of readers? Knowing the target audience/reader is crucial to focusing on the biggest problem they face, and describing the frustrations/consequences associated with inadequate resolution;
- Define the purpose of the case study. The typical uses of a B2B case study include: 1) lead generation (to attract qualified prospects), and 2) for sales (to facilitate the efforts of the sales team). In the interest of maintaining a clear focus, it is not a good idea to use one case study to serve both purposes.
- Write <u>for</u> the target reader/audience. This means using the tone, language, values, and approach that will appeal to them.

BLAND TITLE

The title of the report is the first thing most readers will notice. If the title is bland, it is likely to fail to attract or entice further attention. It could seriously undermine the marketing value of an otherwise well-written case study.

Fortunately, this is one of the easier problems to fix. It is always a good idea to select a title that includes a specific value proposition. Better yet, the value proposition should incorporate benefits/results of interest to the target reader.

The following tips will help strengthen the appeal of a case study's title:

- Inclusion of the professional title or job class of the target reader sharpens relevance;
- Inclusion of an exceptional benefit (preferably quantified in terms of numbers, amounts, % change, % rate) encapsulates interesting information;
- Inclusion of a timeframe (in # of weeks, year, quarter) for realizing the benefits/results boosts expectations;
- Keeping the title relatively short is generally good; including a subtitle offers a desirable emphasis.

INAPPROPRIATE LENGTH

There is no ironclad length for a business case study. However, an inappropriate length might reduce the appeal of a report for certain audiences. In this context, "inappropriate" means too long or too short.

In my experience, two principles should guide the decision on the length of a B2B case study:

1. A clear definition of the target audience or typical reader, which helps identify their constraints and preferences regarding marketing publications;
2. A clear definition of the core problem in the target industry or segment, which helps create a theme for the report.

If the information grabs the reader's interest, the length of the report becomes a secondary consideration. Keep the focus on relevance.

INSUFFICIENT PORTRAYAL OF CLAIMS

This point might appear ironic since case studies are about success claims. The pitfall here is in *how* the claims are presented. There's the temptation to limit the narrative entirely to the sponsoring company's solution. This gives the impression that it is a one-of-a-kind product. If that approach reflects the state of affairs in the industry, great. However, if there are competitors, not so great.

A more balanced approach would be to include other solution options currently available, highlighting how they may be deficient in meeting the needs of the target industry or segment. This provides a backdrop for introducing the superiority of the sponsor's product. It's a good way to ensure transparency and promote the credibility of the claimed benefits.

In addition, describing lessons learned and milestones in the product development and implementation process creates a trust basis for the sponsor's solution.

A persuasive way to portray the benefits/results is to include key performance indicators (KPIs), such as:

- Productivity gains;
- Savings in cost and time;
- Return-On-Investment (ROI) measures;
- Risk reduction in key business areas, such as compliance requirements and loss prevention;
- Revenue growth measures.

INADEQUATE DISTRIBUTION

Failure to take maximum advantage of the versatility of a case study will undermine its marketing impact.

The first logical place to distribute the report is by posting it on the corporate website, and making the access process as easy as possible. However, the website may not provide sufficient exposure to the success story you want your target audience to read.

Other platforms for increasing the visibility of the case study and spreading the word include the following:

- Embedding it in press releases, newsletters, and corporate Blogs;
- Incorporating portions of the case study in material used by the in-house sales team. This has an added advantage of enhancing consistency in corporate marketing message.
- Case studies can be restructured into PowerPoint slides for use in conferences and tradeshows.

In short, in addition to its standalone value, a well-written case study works well as an integral component of corporate marketing/sales strategy.

CLOSING THOUGHT

A well-written B2B case study is arguably one of the most effective ways to create a visual image of attainable success in the mind of a prospective client.

A good compass for staying the course is to be mindful of the fundamental question: **What is the purpose of the report?**

The answer to that question will clarify all key aspects of producing a winning B2B case study, including the target reader, the core problem, the appropriate tone and language, and the solutions most relevant to the reader's needs.

The right answer is important in defining the length of the report, the distribution media, and its role in the overall marketing/sales effort of the sponsoring company.