

The Case Study Production Guide

Write first, ask for approval second. 3 weeks, not 6 months.

The template isn't the hard part. **Getting it produced is.** Use the "write first" approach: build the case study from data you already have, then send the draft for approval. The customer reviews instead of creates. Friction drops 10x.

1 Tiered Consent Framework

Always aim for Tier 1. Take whatever tier the customer offers.

Tier 1: Full Public

GOLD

Name, logo, title, photo, quotes, specific metrics. Published and promoted.

Tier 2: Named, Limited Metrics

STRONG

Company name + logo, but softened numbers. "More than 40%" instead of exact figures.

Tier 3: Anonymous Public

GOOD

"A 50-person SaaS company in healthcare" with real metrics but no company name.

Tier 4: Named Quote Only

QUICK

2-3 sentence testimonial with name and title. Stack 10 of these for a testimonials page.

Tier 5: Internal Only

HIDDEN GEM

Full case study, not public. Available only to your sales team. Legal says yes far more often.

The 3-Week Production Timeline

- WEEK 1 Identify + gather + write.** Pull usage data, onboarding timeline, sales notes. Write the full draft from what you know. Leave a quote placeholder.
- WEEK 2 Send for approval.** "We wrote this up. Would you review it, add a quote, and let us know if anything needs adjusting?"
- WEEK 3 Publish + distribute.** Website, content library, one-page summary, testimonials page. Follow up once if no response; default to Tier 5.

CASE STUDY WRITING TEMPLATE

1. Snapshot

Quick-reference box: company, industry, size, use case, key result. ~50 words. This is what reps scan to decide which study to send.

2. The Challenge

What was life like before? What tool/process were they using? What was the cost? What triggered the search? ~150-250 words. The trigger is the most important part.

3. The Solution

How did they implement? How long to rollout? Which features first? How did adoption happen? ~200-300 words. Tell a story, not a feature list.

4. The Results

Metrics first: primary metric, business impact, adoption metric. Then the narrative of what changed. ~200-300 words. Lead with the number.

5. The Quote

One quote about how they feel, not the metrics. Prompt: "What changed for your team?" 2-3 sentences. Real voice, not corporate-speak.

6. CTA

One line. Link to demo/trial/call. Don't overthink it.

Better Interview Questions

- "What challenges were you facing?"
"Walk me through the last time a rep needed content and couldn't find it."
- "How has our product helped?"
"How long does it take to find content now vs. six months ago?"
- "What results have you seen?"
"What's one metric that changed? Even a rough number?"
- "Would you recommend us?"
"What would you tell a friend in your role? The real version."
- "What do you like about it?"
"What's the one thing you'd fight to keep if someone tried to cancel it?"

The Day 30 rule: Ask for the case study 30 days after onboarding, not 18 months later. The "before" pain is still fresh, early results feel impressive, and the champion hasn't rotated out yet. Bake it into your CS playbook as a standard check-in item.