

# HOW TO BUILD A SMOOTH CUSTOMER CASE STUDY PROCESS



**Customer case studies are valuable marketing tools. They are, however, like most valuable things, hard to produce for many built-environment companies.**

While most of these companies have plenty of happy customers, writing case studies about them can be challenging for a variety of reasons, including:



**lack of direct access** to customers if your products are sold via a trade or retail channel



**time-poor or disinterested customers** who see no benefit to them in participating in the process



**protective sales teams** that restrict marketing from speaking to their accounts



**lack of resources** to manage an ongoing case study program.

There are four ways to overcome these issues and create a strong pipeline of case studies:



### 1. Use social media to find and contact end customers

Depending on your product, you can often find happy customers sharing their brand or product experience, unprompted, on their own Instagram, Facebook or other social channels. If these are publicly accessible, then they can be a great way to find potential brand advocates directly and offer them a chance to feature in marketing campaigns including case studies. This research and customer outreach is something your PR agency can drive on your behalf very easily.



### 2. Allocate a dedicated resource

Most organisations can't afford a dedicated resource to focus on case study production. However, a full pipeline depends on having someone who can develop relationships with all stakeholders, review projects for potential stories, speak with equal knowledge and confidence to on-site project contacts and in-house communication teams, and shepherd the story through various approvals. Generally, the careful process of getting case studies off the ground puts them in the too-hard basket for organisations, and case studies become rare and difficult.

By working with an agency that specialises in the built environment, you can gain a dedicated case study resource at a fraction of the cost of an in-house resource. Managing various (and sometimes, conflicting) stakeholders, gathering the necessary information, and creating a compelling, impactful story takes well-honed and practiced skills. Look for a PR agency with a strong and proven track record of managing case studies, and ask to see samples of their work.

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### 3. Create a case study culture

When case studies are seen as an afterthought, it can be tricky to gain buy-in from salespeople, which can mean that communications teams struggle to gain visibility into potential stories. The salespeople also usually need to introduce the team to the customer; without a strong culture around case studies, this is unlikely to happen.

However, when sales teams know that they will be rewarded through recognition and praise for identifying and supporting case studies, they will be more likely to put their customers forward. And, when they see their peers' customers in the spotlight, they will be more inclined to want to put their own customers in that same spotlight.

Consistency and visibility are key to creating a strong culture around case studies. This requires teams to have regular contact with salespeople to ask them for case study referrals. However, if the quality isn't there, or the cadence is unreliable, salespeople will soon avoid putting their customers forward.

Working with an agency can help overcome this issue, since the agency can manage both quality and consistency. It's important to work with an agency that is highly capable and proven to develop strong relationships with internal stakeholders. This requires an agency with extremely strong domain knowledge and experienced consultants who speak your sales team's language.



### 4. A track record of treating your case study participants well

An often-overlooked element of developing a pipeline of case studies is the experience that your customers have when developing the case study. Is your PR firm just giving your customers another job to do? Are they being too pushy, not assertive enough, or creating friction for your customers? It only takes one or two customers to have a negative experience and you may find your well of willing customers drying up.

**With the right approach, supported by professionals with extensive experience and expertise in managing case studies, you can turn your happy customers into brand advocates. To find out how, contact the Write Away team today.**

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