



Case
Study
Buddy

The Big List of 100 Ways to Use Your Case Studies



Table of contents

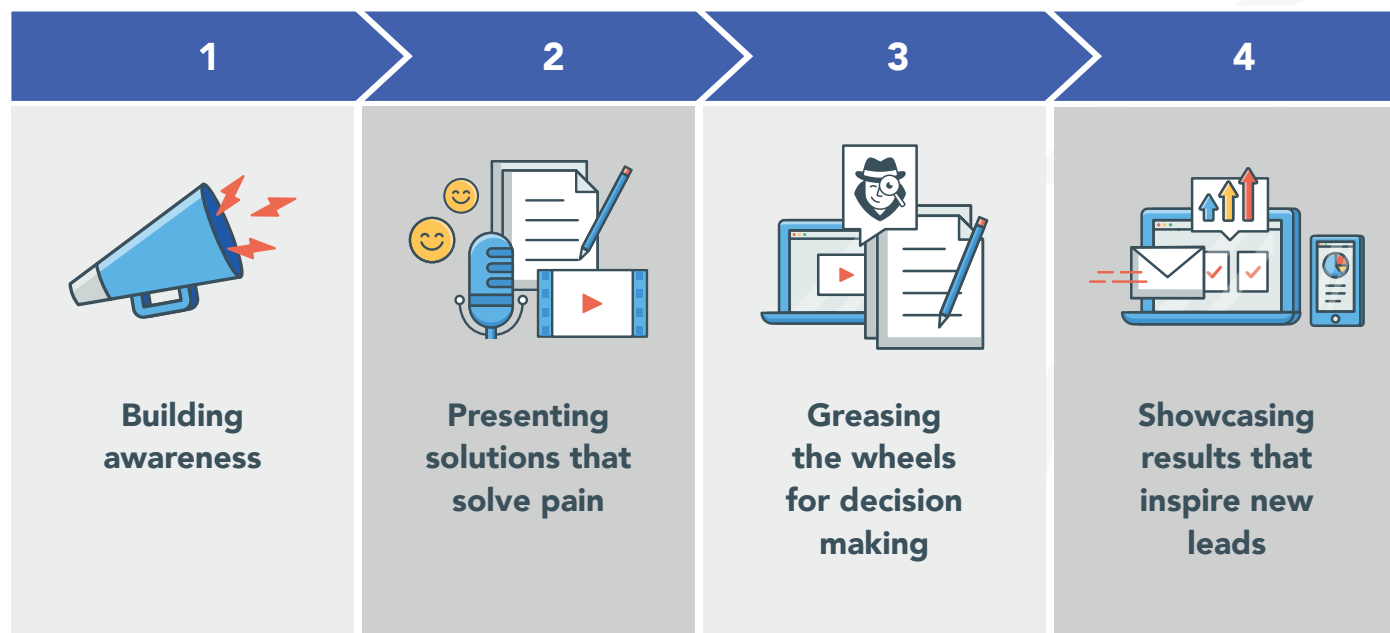
- Introduction..... 3
- Outbound sales..... 4
- Inbound marketing 8
- Internal use & staff recruitment 13
- Authority building 14
- Want to get started?..... 17



Say “Hello” to the most versatile asset in your marketing arsenal

Few things are as powerful as a client success story turned into a case study.

It’s one of the only assets that can serve clients along the entire buyer’s journey, from building awareness to inspiring new leads:



Clearly, we’re not just talking about PDFs or simple on-site case studies.

We’re talking about case studies and all their “byproducts”—those dazzling customer interviews, amazing soundbites, compelling video testimonials, and more—that can be repurposed and deployed in a multitude of ways across the sales funnel.

Honestly, it’s hard to imagine a more versatile piece of content.

So how many ways CAN you use case studies?

Here’s a list of 100+ ways to get you started.



Nothing is more convincing to prospective customers than demonstrating you've helped other companies solve the same challenges they're facing.

That's why case studies are an excellent fit for outbound sales and marketing, such as email outreach, sales meetings, and social media advertising.

- 1. Paid social media ads.** Include success metrics, testimonials and links to relevant case studies in your social media ads. This can be a powerful tactic, especially when metrics driven. People want to know how you got that impressive result or alleviated that pain point.
- 2. Sales pages.** Include testimonials from case study interviews on sales pages (especially near points of friction or big promises/claims) and longer form ads.
- 3. Retargeting campaigns.** Use case studies in your paid retargeting campaigns to re-engage visitors to your website. If they watched a video about checkout conversions, for example, serve them an ad promoting your case study on how you increased checkout conversions by 140%, as [CartHook](#) does here:

CartHook

About Blog Support Login

How CartHook helped Kettle & Fire increase checkout conversions by 140%

Listen to our conversation with Wilson Hung, Director of Grow at Kettle & Fire, where we discuss their strategy and their plans for 2019.

CartHook - Kettle & Fire Webinar

CartHook | Kettle & Fire

PRESENT

THE FUTURE OF ECOMMERCE

47:53

Cookie policy

4. **Direct marketing.** Highlight a customer success story in a mailer to prospects and customers.
5. **Startup pitch decks.** Tell potential investors a story of your business and how you plan to grow it. Create a pitch deck that includes examples of how you successfully executed on a small scale and how it plays into larger growth goals.
6. **Sales pitch decks.** Include success metrics and quotes from interviews to boost confidence when you're pitching a prospective new client.
7. **Problem-solution pitch decks.** Pre-emptively solve pain points by defining the problems you excel at solving and then show proof that you've solved that problem in the past (and that your method surpasses all competitors' methods).
8. **Sales meetings.** Hand out printed versions of case studies to prospective clients.
9. **Internal selling.** Give your contact a powerful case study to help them convince their bosses why your product or service is the right one.
10. **Sales call follow up.** Ask if you can follow up your sales call by sending a relevant case study, or provide one proactively and reference how it's relevant to that prospect.
11. **Marketing presentations.** Create a slide deck of the success story for in-person meetings or presentations.
12. **Compilation decks.** When you have lots of case studies, sum them up and turn it into a HUGE compendium of single-page success stories.
13. **Trade shows.** Print case studies and hand them out at your booth or tuck them into swag bags.
14. **Upselling.** Use the success story to pitch a premium service or product to existing customers.
15. **Client onboarding.** Use as part of your client onboarding sequence. Show a use case about a challenge the particular lead needs to solve, explain a relevant feature with an example, or share a scenario that pertains to their industry.

16. **Email signatures.** Include a link to your case study page or a specific case study so that everyone you interact with will passively encounter your social proof!
17. **Business cards.** Include a link to your case study page or a specific case study.
18. **Voicemail.** Mention your customer success story when you get customers' voicemail, making sure to include the main metric. Let them know you'll send them a copy.
19. **Awards.** Host an award ceremony recognizing the customer with the best implementation of your product or service and invite employees who helped achieve that win to participate. Consider offering prizes.
20. **Press conferences.** Share the customer achievement that was made possible by your product or service.
21. **Email marketing campaigns.** Use as a part of your email marketing campaigns.
22. **Drip email series.** Build a drip email series around a case study (e.g. email #1: problem; email #2: solution; email #3: results and CTA).
23. **Video in email outreach.** Email links to your case study videos. Use the word "video" in the subject line to increase open rates.
24. **Metrics in email subject lines.** Put the most impressive metrics in your email subject lines to grab attention. This could be something like:
 - "__% higher (metric) in ___(time). Interested?"*
 - "What could you do with __% more ___?"*
 - "How to get XX% traffic for your _____"*
 - "[Case study] How XYZ Company got _____ (result)"*
25. **Quotes in email subject lines.** As above, but with your best client quotes:
 - "I wish I'd known about XYZ Company sooner...."*
 - "XYZ Company totally saved our bacon...."*
26. **Cold email outreach.** Include case studies as part of your cold outreach.

27. **Re-engage dormant clients.** Send an email that includes a teaser of your case study win and a link.
28. **Customer retention.** Share case studies with existing customers to upsell and/or increase retention rates.
29. **Newsletters.** Repurpose your case studies as newsletter articles or include teasers with links to download or view. This could be something as simple as:
"We helped a _____ company shorten its app development process by 12 months, giving it an important market differentiator for the next insurance open enrollment period. [Find out how we did it here.](#) <link to case study>"

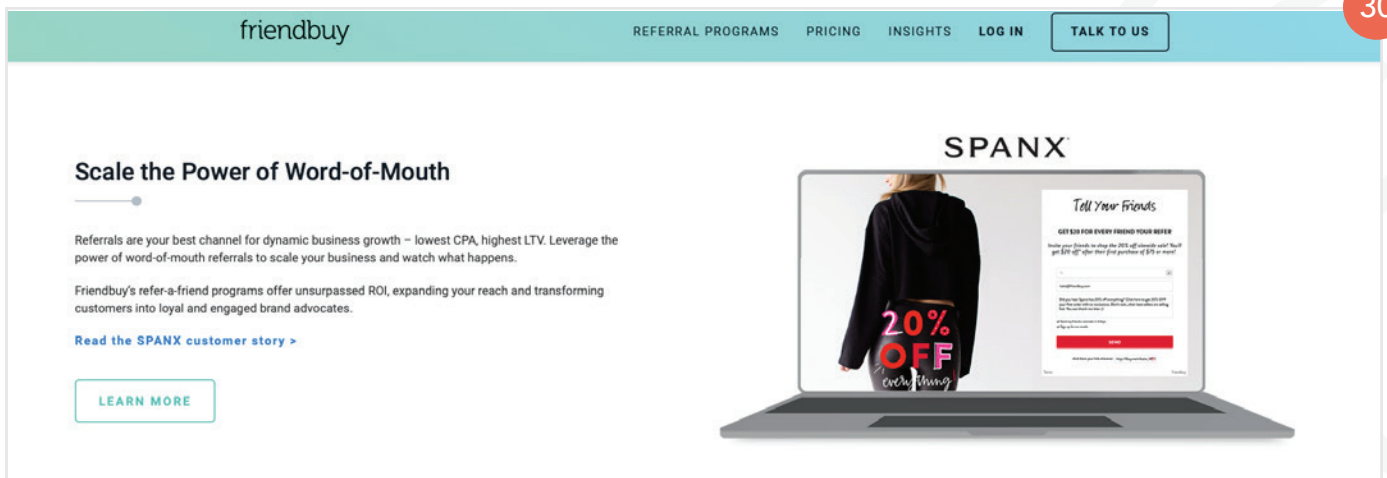


Inbound marketing

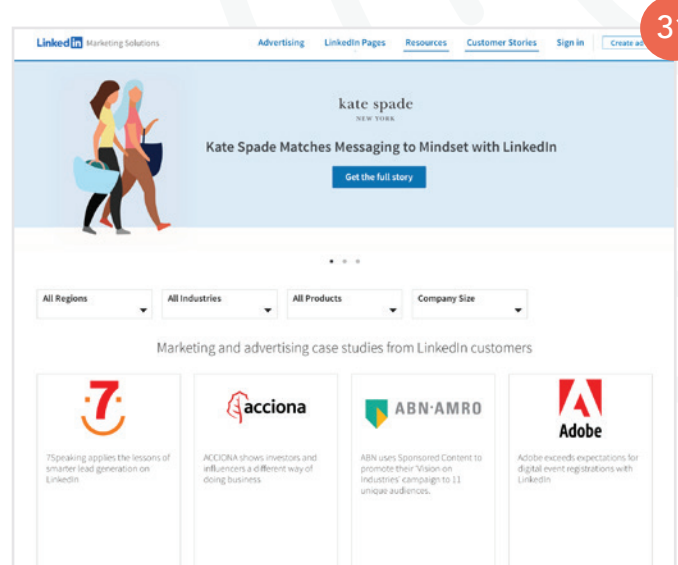
When prospective clients come to you, they're looking for evidence that you know what you're doing and you can help them solve their problems.

Case studies provide that evidence, whether it's as a lead magnet, part of your client onboarding process, or an attachment to your RFPs.

- 30. Home page.** Include a teaser and CTA with a link to a specific case study, as [Friendbuy](#) does at the bottom of its home page:



- 31. Case study hub.** Create a dedicated case study page and include links to download PDFs of customer success stories, like [LinkedIn](#) has done:



32. **Teasers.** Put a summary of your success story on your website in HTML with a link to download the full story, like this example from [Loganix](#):
33. **Dedicated case study pages.** Put case studies on individual pages, showcasing [one customer success story per page](#).
34. **Landing page proof.** Pull testimonials from interviews and put on landing pages to increase conversion rates.
35. **Whitepapers.** Use as an example within a whitepaper, or build a whitepaper around one case study or series of case studies.
36. **Video case studies.** Embed on your home page or case study page.
37. **Before and after examples.** Convince on-the-fence prospects by spelling out what life was like before your solution, and how much better it is after. Turn into a blog post, downloadable PDF, slide deck... or all of the above!
38. **Competitor comparisons.** Tell leads a story about why one (or more!) customer(s) decided to switch from a competitor's product to yours.

The screenshot shows a landing page for Rankings.io. At the top, the Loganix logo is on the left, and navigation links (LOG IN, SERVICES, ABOUT, CONTACT, BLOG) are on the right. The main heading reads "rankings.io Rankings.io Achieves Local SEO Dominance with Help from Loganix". Below this, it specifies "INDUSTRY: SEO" and "LOCATION: U.S.A.". A central graphic shows a bar chart with a red arrow pointing up and the text "7x more keywords on the first page of Google". A red circle highlights a "DOWNLOAD THE FULL STUDY" button. Below this is a testimonial from Chris Dreyer, President and Founder of Rankings.io, with a photo of him. The page is divided into sections: "Overview" (describing Rankings.io's struggle and solution), "Challenges" (forecasting demand), "Solution" (Loganix as a strategic partner), "Results" (7x more keywords, improved search rankings), and "Authority Link Building Made Easy" (high authority, contextual links). Each section has a "LEARN MORE" or "GET A CONSULT" button. A "DOWNLOAD THE FULL STUDY" button is also present at the bottom of the content area. The footer section is titled "About The Company" and describes Rankings.io as a specialized SEO agency.

39. **Onsite testimonials.** Pull quotes from client interviews and sprinkle throughout your site, as we've done on the [Case Study Buddy home page](#).

40. **Pricing pages.** Use testimonials to overcome points of friction, such as pricing pages. Use them to feature a happy client who got their money's worth, and more.

41. **Audiogram testimonials.** Put audiogram testimonials on friction points on your website or share on social media.

42. **Product pages.** Include links to written case studies on relevant product pages.


43. **Ebooks.** Combine multiple case studies into one massive downloadable asset that focuses on one industry/sector/pain point.

44. **Gated lead magnets.** Use as a gated lead magnet to grow your email list.

45. **Headings.** Put metrics in H1 or H2 headings where relevant.

46. **Pop-ups.** Hit visitors with a pop-up that invites them to download a case study when they show exit intent. In this example, [Copyhackers](#) sends visitors a toolkit that includes a tutorial-style case study when they sign up:

Our customers say it best!



Jessica Mehring, CEO, Horizon Peak Consulting

Worth every penny! They did the interview, which made my client feel more at ease talking about her experience working with me. They did the writing, so I didn't have to worry about getting too close to my own stuff. And I didn't have to deal with trying to find a designer. All of that for one ridiculously reasonable price.



COPYHACKERS

Want Our Free Course?

The Ultimate SaaS Onboarding Kit
Writing Training

Learn to confidently write a SaaS onboarding sequence and triple your paid conversions!

Yes Please!

- 47. **RFP attachments.** Include case study links in your RFPs to bring additional proof to your proposal.
- 48. **Proposals.** Include case studies to prove that you can actually DO what you outline in your proposal.
- 49. **Written testimonials on social.** Share testimonials from your case study interview in social media posts.



52



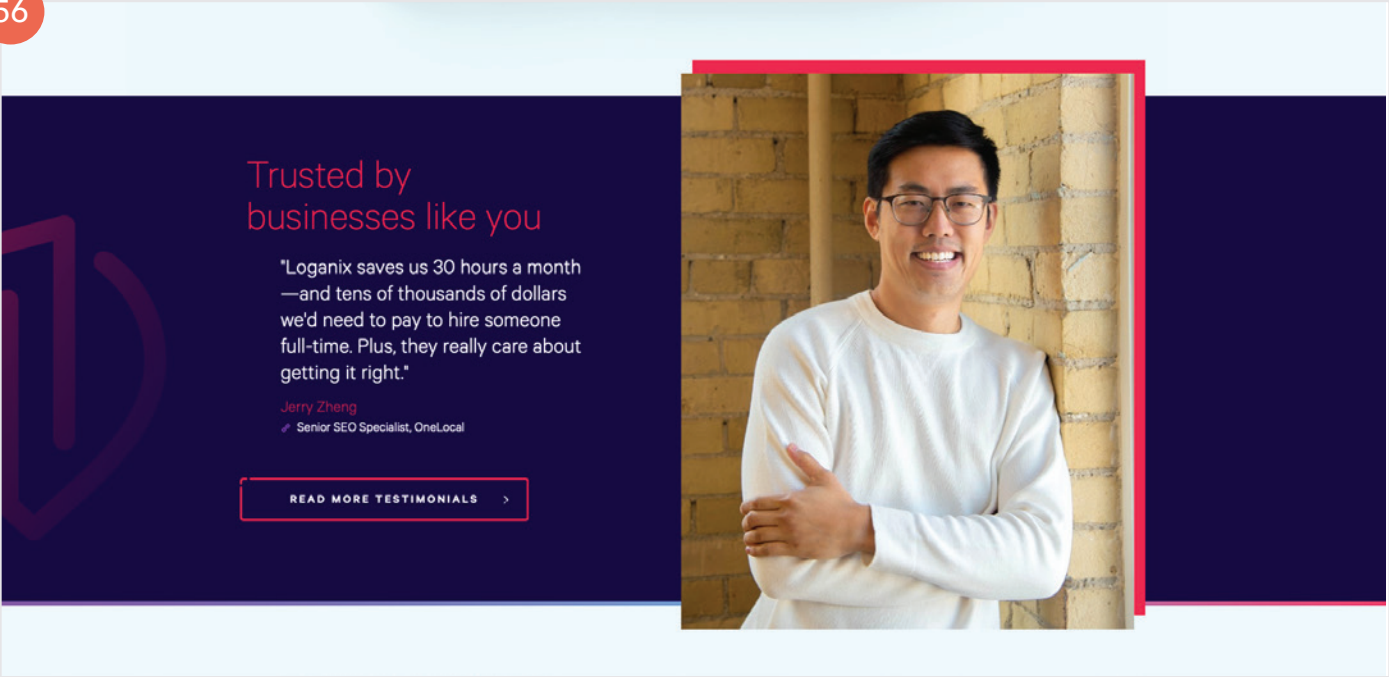
- 50. **Metrics on social.** Share case study metrics in social media posts, as we've done above.
- 52. **Video testimonials on social.** Share video testimonials on social media. Consider creating a YouTube channel if you have a lot of high-profile wins!
- 52. **Links on social.** Share a link to your PDF or case study main page on social media. Tag and/or link to your client to reach their network as [Mailchimp](#) has done.

- 53. **Audiograms on social.** Share quick audiograms from your case study interview on social media.
- 54. **Infographics on social.** Put your case study metrics into an infographic and share on social media. It's great for visual platforms like Instagram or Pinterest.

55. **Testimonial cards on social.** Create image cards with testimonials and client headshots and share on social media, like [Loganix](#) has done:



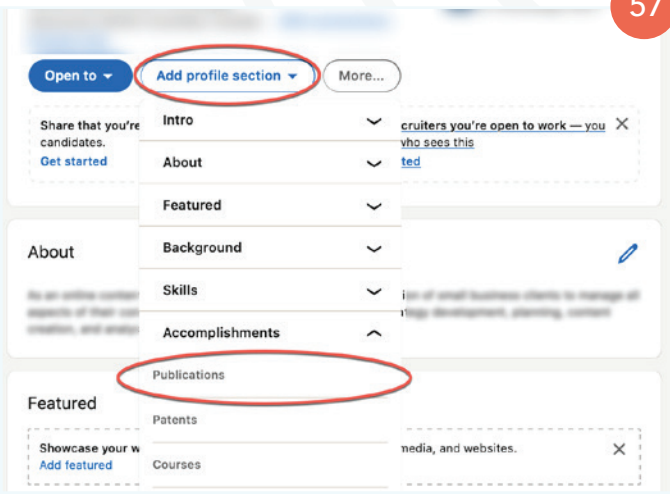
56. **Testimonial cards on your website.** Testimonial cards can also make a great addition to your website. This one is at the bottom of the Loganix home page:



57. **LinkedIn publications section.** Add case studies to the list of publications on your LinkedIn personal profile:

58. **LinkedIn publishing platform.** Republish case studies to LinkedIn's publishing platform.

59. **Groups.** Share in relevant Facebook or LinkedIn Groups



Internal use & staff recruitment

There's nothing more powerful than a compelling success story to grease the wheels when you want buy-in from internal stakeholders or decision makers.

Case studies can also transform employees into brand advocates by giving them a first-hand taste of the impact your brand is having on your clients and their customers.

And case studies also make powerful inter-departmental training tools.

- 60. Facilitate buy-in.** When you need ammunition to convince decision makers to go for your chosen solution, show them a case study that demonstrates proof.
- 61. Team pitch decks.** Bake success story slides into your team pitch to showcase your team's accomplishments and capture an investor's attention.
- 62. Vision-opportunity pitch decks.** If a client used your product or service in an interesting way, you might have the opportunity to tap into new markets. Showcase the win to gain buy-in as you explore new business goals.
- 63. Staff training.** Leverage case studies to train your team how to successfully solve a myriad of issues—show off what worked and learn from what didn't.
- 64. Sales rep training.** Educate sales reps about how different products and solutions have been implemented by your customers—and the amazing results they achieved because of them.
- 65. Cheat sheets.** If you solved a new problem using easily repeatable steps, turn it into a checklist or cheat sheet that other marketers, developers, or sales reps can refer to in the future.
- 66. Educate product developers.** Show how different companies are using your products and services.
- 67. Staff orientation.** Work with your HR team to incorporate case studies into training materials so new staff members can see how you solved a problem.

68. **Training exercises.** Pose the “challenge” you solved to your team and ask how they would handle it. Follow up with what you actually did, what worked, and how you could iterate and improve in future scenarios.
69. **Job candidates.** Share with job applicants to show the positive impact they could have working for you.
70. **Office culture and morale.** Let employees share in the satisfaction of helping others achieve their goals. Boost morale and set high standards. Print and frame testimonials or create a customer success photo album.
71. **Job fairs.** Print and distribute at job fairs to differentiate your opportunities.

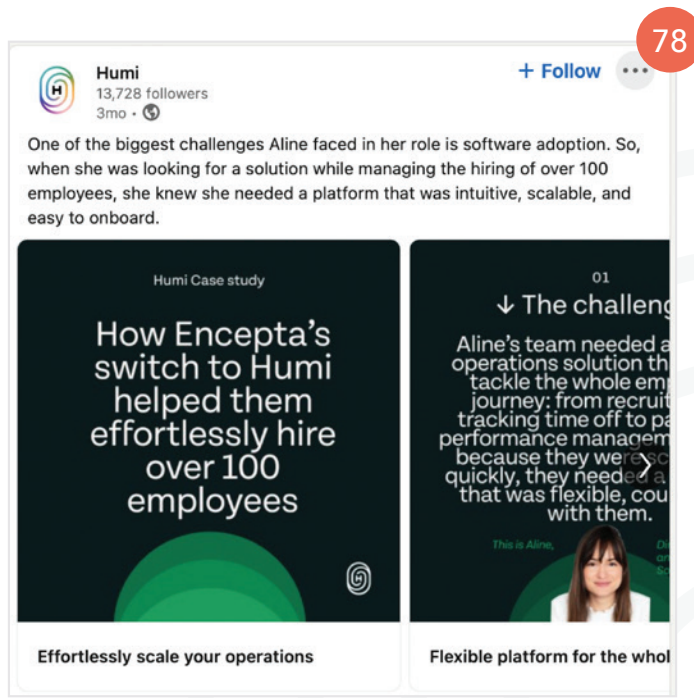
Authority building

Building your authority is an important step in demonstrating your ability to solve the problems of prospective clients.

Case studies are outstanding authority builders—whether they’re transformed into blog posts, promoted on social media or distributed during trade shows.

72. **Videos.** Embed videos in your home page, landing pages, feature pages, and anywhere else they might inspire a conversion. It’s way more compelling than talking yourself up.
73. **Docuseries.** Turn huge projects into a multi-part video series that probes the challenges, the steps you took, and the clients’ reactions. Nothing builds confidence like a deep dive into a specific use case.
74. **Webinars.** Use your success story as an example in a webinar. If possible, have your customer join as the hero of the story.
75. **“How-to” webinars.** Use your success story to illustrate during “how-to” webinars.

- 76. **Ebooks.** Combine with other case studies to create a downloadable ebook.
- 77. **SlideShare.** Turn your success story into a SlideShare and upload to the SlideShare platform.
- 78. **Carousel posts.** Turn your case study into a challenge/solution/results carousel post and share to social.
- 79. **Mastermind groups.** Tell stories about how your clients achieved success to inspire your mastermind group.
- 80. **Industry roundtables.** Use your case study as the basis for discussion with other industry experts.
- 81. **Industry speaking events.** Use as the basis for speaking engagements at industry events.
- 82. **Podcast episodes.** Use as the basis for a podcast episode and include your client as a guest. Include highlights of the case study in the show notes.
- 83. **Brochures.** Include links in brochures in industries where brochures are still common, such as manufacturing.
- 84. **Press releases.** Tell your success story in your press release or include links in a press release to reinforce messaging. Lead with an impressive metric to catch the attention of busy editors.
- 85. **Media pitches.** Pitch journalists, editors, or media outlets in a relevant industry and reel them in with concrete metrics and customer quotes.
- 86. **Guest articles.** Submit your story of success to industry journals or blogs. You might have more than one guest blogging opportunity (especially if you collaborated with another company to help deliver a solution!).



87. **Newsworthy blog posts.** Share the success story on your company blog! The story of how you helped a well-known company is great for brand recognition.
88. **Personal stories.** Dive deep into how you helped a customer solve a specific problem, and the extra steps you took to solve it.
89. **“How-to” blog posts.** Create blog posts that explain how to get “X” results—especially when you drummed up some truly eye-catching metrics that prospects and leads are going to covet for themselves.
90. **Interview blog posts.** Re-purpose the case study interview into a [Q&A blog post](#) where you follow (more or less) the structure of the original interview.
91. **Pictorial blog posts.** If you have a highly visual solution (e.g., you’re an architect or a graphic designer), create a blog post explaining how you helped your customer, share photos, and explain the “Why” behind your process.
92. **Checklists.** Turn specific steps you used to help one customer into a downloadable checklist.
93. **Internal linking.** Reference a case study every time you bring up a relevant topic in a blog post, even if that post is not solely focused on the case study.
94. **Conferences and trade shows.** Hand out printed versions along with your business card to new contacts.
95. **Venture capital proposals.** Include customer success stories as proof of the value you deliver.
96. **Fundraising appeals.** Use case studies as part of your fundraising campaigns.
97. **Grant applications.** Include as proof of what you can do when your funding requests are approved.
98. **Public service announcements.** Include as part of your PSAs to add real-life examples.
99. **Industry awards.** Use as evidence of your success when applying for industry awards.
100. **Annual reports.** Include in your annual report to add a dose of on-the-ground reality to your numbers.



Case
Study
Buddy

Want to get started?

Case Study Buddy is the ONLY specialized team dedicated entirely to customer success stories: writers, designers, videographers, marketing and sales veterans who know how to turn success stories into sales.

Want to learn more? Contact us to start the conversation.

Contact Us