

# Case Study Template For B2B Case Studies

(with an example)



*Helping You Understand & Reach Customers*  
*JEM 9 Marketing Consultancy*



# Case Study Content Template Explainer

## Naming Convention e.g. Segmentation Criteria

e.g. Geography, Industry Sector, Scope/Size

### Situation

What is the client's contextual starting place. Consider the key aspects influencing their situation. PESTEL – political, economic, societal, technology, environmental and legal.

Aim to 'situate' the case study in the market and competitive context that your client faced.

Make sure to 'size / scope' this client so future prospects can 'relate', i.e., see themselves or imagine similarities. Are they a "market leader" or nimble and innovative? Do they have internationality clientele or work with archaeologists at the cutting edge of research?

### Objectives

1. Explain to your reader, the key project objectives. Lists may encourage you to focus on key customer needs & pain points. Lists are easier to skim and provide variety for the reader.
2. Clients often have to make trade-offs. Including these 'keeps it real' e.g. do A before B, within budget € or work with existing SharePoint.
3. Including specifics make a case study more tangible e.g. delivery by the opening ceremony of the London Olympics.

### Results – Stats & Stories

- How is the situation changed for your client? This is corner to shine. If a prospect reads only one aspect, this will be it! Ideally include stats / numbers and stories.
- Use the language typical of the customer persona / market segment. Screen for internal acronyms.
- Results should align well with the 'objectives. What is faster, more reliable, cheaper, better quality, more accurate, now possible?
- What proof can you offer?
  - Show -> imagery
  - Tell -> quotes
  - Return On Investment?? Other
- Trust is extremely important.

### Actions / Products

- The core of what you delivered. But don't wait until the end to start collecting actions.
- Think about the customer journey to resolution. What action prepare and implement changes?
- Who was involved? People, departments or existing processes were involved?
- Don't skimp on the other aspects. Building a picture of the situation and objectives is as important as your actions.
- Aim for 'action' to make up no more than ¼ overall case study.

### Quotes

Lara Fox

Assistant Director Customer Experience & Service Improvement at Southampton University



- “ Some people find it hard to write you a quote. Many times it easier to talk to them and write it down yourself to later ask if that's the essence of it. Something too long is great. You can shorten it.
- “ Aim for something specific. "It was great." does not give a sense of what to expect. "The team were easy to work with and friendly" tells a richer story.

### Imagery

1. Client Contact – give a face to your customer making them real. Ask for high resolution images.
  2. Application Image – a picture that gives a clear sense of the customer set up. E.g., Manufacturing might call for a factory floor image. Try to include action – people doing whatever it is they typically do (not looking at the camera. A real 'less than ideal' shot is better than most stock imagery.
  3. Action – an in-progress image gives prospects a clear idea of what to expect as they move to the new improved situation with your solution in place. Includes tools / support in the picture.
  4. Results – outcome image. This might be statistics / graphs, before and after, screenshots, your product in-situ or in action.
- Aim to have 3 – 4 good images for your article, case study or blog post.

# Sample B2B Case Study: UK University IT Services Department

## Situation

In an increasingly competitive market place and to support the university's 10 year vision, the IT Services department of this international research and education provider sought to switch towards a "customer experience" mentality.

With tens of thousand of customers with different goals and types of experiences working with the team, teasing out differing needs was critical.

## Objectives

1. Develop a shared understanding of customer needs & pain points through development of customer persona(s) based on knowledge (not opinion).
2. Collect and analyse disparate knowledge across teams and data silos
3. Build on team enthusiasm for understanding of customer needs.

## Results

- Five detailed customer personas each with their 'ecosystem' of influence grounded in the market space, and each clearly differentiated from the others.
- The ability to develop customer experience metrics and improvements aligned to customer need, including those formerly invisible.
- Customer empathy and a shared language as corner stones for change which requires team involvement and commitment.

“ Jane explains concepts in easy to understand manner. [She] runs workshops in a way that all are involved, ..... understand[s] the context of the environment and the customers within it, quickly and thoroughly.

IT Services Team Members

## Actions

- Preparatory market research to understand core market context, particularly on-going change.
- Internal stakeholder interviews and an alignment workshop identified disparate data sources, pooled team knowledge and encouraged engagement.
- ~40 data sources, including digital customer touchpoints, such as web analytics, and customer support analytics, were explored.
- Semi-structured interviews with ~70 customers filled knowledge gaps. The data analysis methodology enabled the team to share knowledge and identify critical 'voices'.

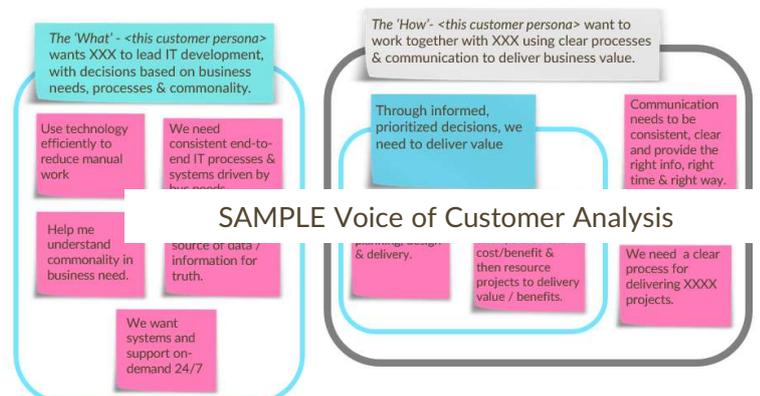


**The team find Jane accessible, approachable and easy to work with. The final analysis made a lot of sense: it's what I heard during the 'voice of the customer' interviews.”**



**Lara Fox**  
Assistant Director Customer Experience & Service Improvement at Southampton University

With respect to IT, what are the most critical needs of <this customer persona>?



# Case Study:

## B2B Data Center Management SynapSense Corp

### Situation

SynapSense Corporation is a leading provider of energy efficiency, wireless environmental monitoring and cooling control solutions for Data Center Infrastructure Management.

With customers around the world in finance, technology and healthcare, SynapSense users benefit from data center resiliency, and reliability. SynapSense wished add outside experts with direct industry experience to augment in-house resources.

### Objectives

With existing lead generation landing pages in place, the Director of Marketing at SynapSense Corporation wished to:

1. Communicate "Thought-leadership"
2. "Best In Class" Social Media Presence (Versus Benchmark Organizations)
3. Generate Website Traffic & Sales Leads

### Actions

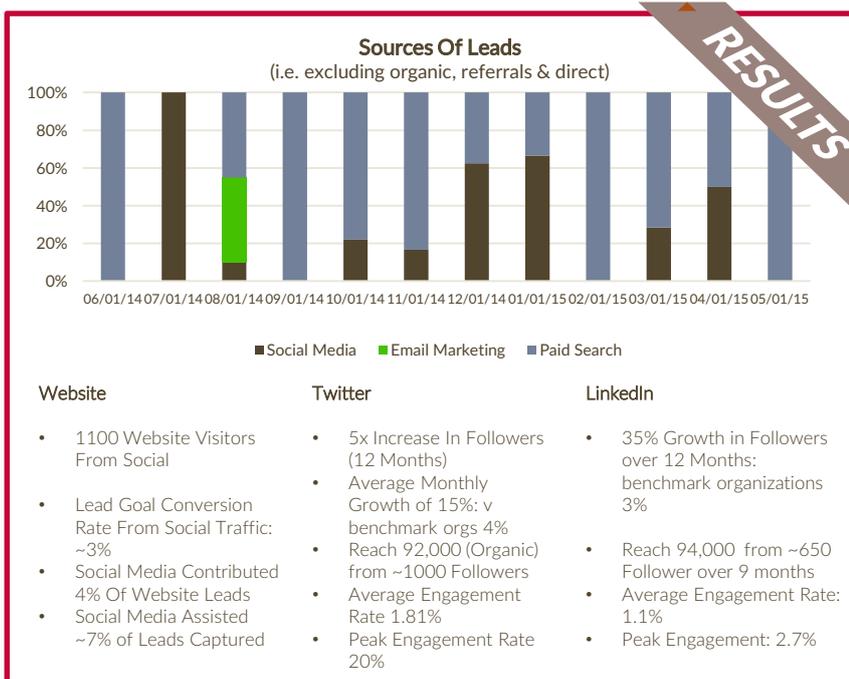
- Develop Social Media Content Plan Aligned to Marketing & Event Plan
- Create & Publish Social Media Content; Imagery, Copy, CTA
- Results-Based Focus Using Google Analytics & Native Analytics



Sample LinkedIn Post

“ Jane is very easy to work with, has great judgement, discretion, and gets results.”

### Results

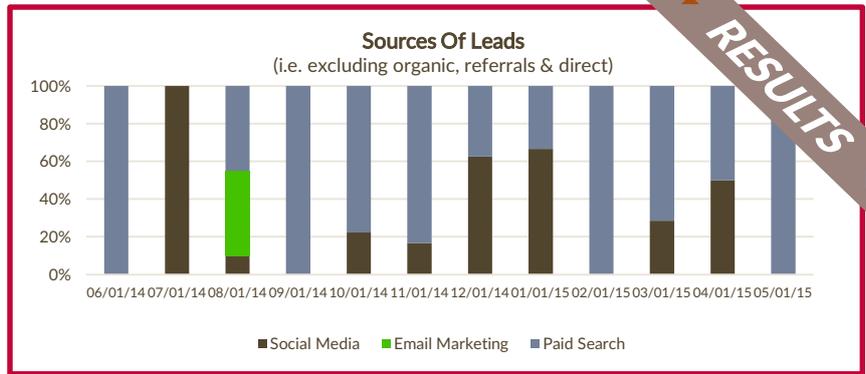


**Patricia Nealon Wright**  
Director Of Marketing  
SynapSense Corporation  
California, USA

# Case Study

## Results Examples

### Graphs - One Approach To Results



### Results In List Formats

- Product innovation strategy based on market opportunity and customer needs to guide project selection, product development, positioning and marketing.
- Shared team vision and prioritization through involvement. Select 'market definition' data was turned into posters hung on walls on 3 continents as a practical reference for teams and execs.

- Qualitative identification of multiple customer personas with different needs and different technology experience.
- Identification of content marketing needs, including sector specific case studies. Prospects questions are poorly addressed.

3. Leaving prospects

- Shared team vision and prioritization through team involvement, and turning the project output into posters hung on walls in 3 continents as a practical reference for teams and execs.
- Detailed customer personas and their 'ecosystem' of influencers within the market space.
- Prioritized customer persona needs used to guide product development, positioning and marketing.

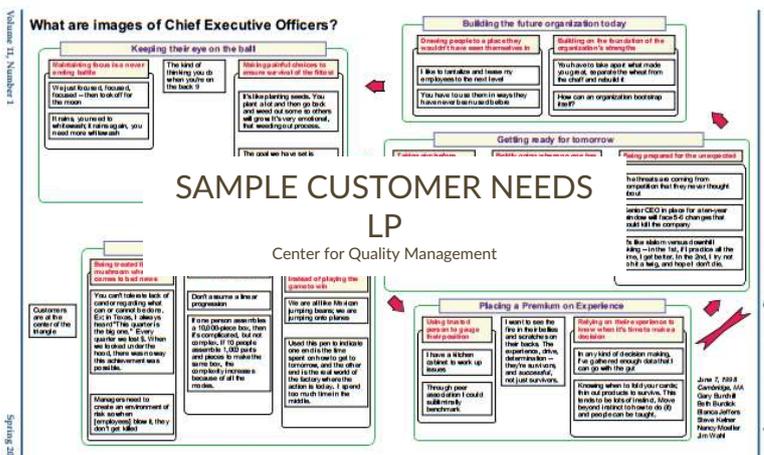
#### Early Funnel - LinkedIn

- 35% Growth in Followers over 12 Months: versus benchmark organizations 3%
- Reach 94,000 from ~650 Follower over 9 months
- Average Engagement Rate: 1.1%
- Peak Engagement: 2.7%

#### Mid-Funnel Web

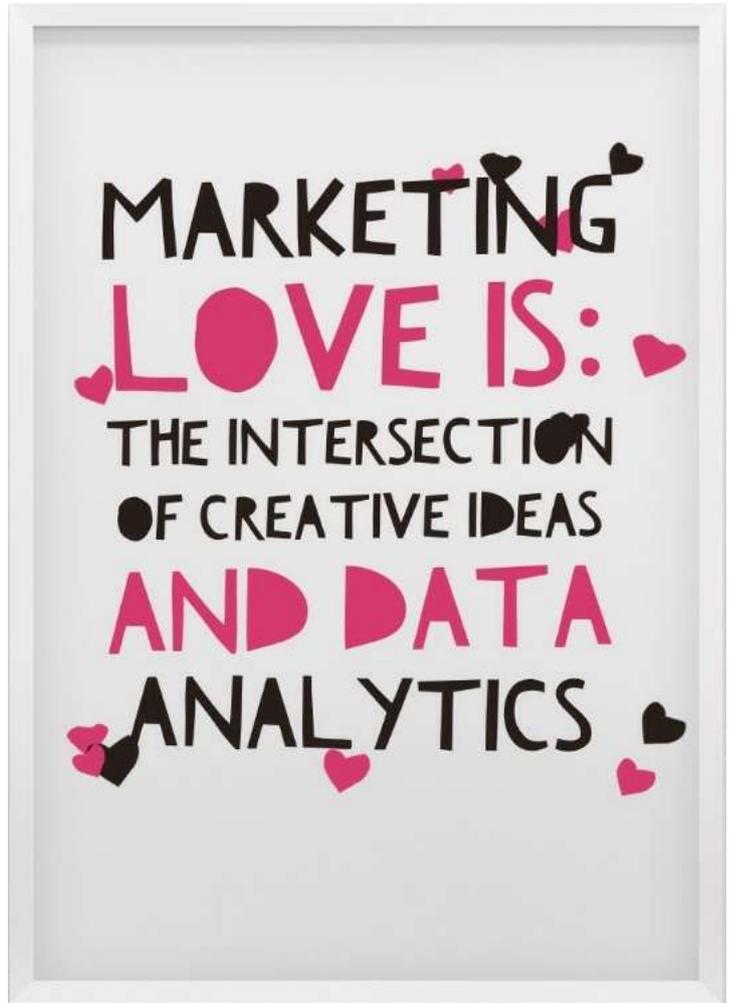
- 1100 Web From Social
- Lead Goal Rate From ~3%
- Social Media ~7% of Lead

### Project Output - Another Approach To Results



# JEM 9 Marketing Consultancy Approach

1. Understand Your Business Goals
  - Help you better understand and reach *your* customers.
  - Philosophy - > Customers are the heart of marketing. With team involvement comes commitment.
  - Be passionate about helping you succeed
2. Establish A Baseline
  - What is the current status?
  - What is broader market context?
  - What's already contributing to goals?
3. Use Frameworks & Processes For Efficiency & Speed
  - Use an analytical fact-based approach
  - Identify opportunities & gaps
  - Develop realistic "SMART" plans
4. Develop A Partnership
  - Work closely with you over several months
  - Develop a partnership based on trust
  - Two-way open communication to maximise learnings and opportunities



## Jane Morgan

Jane is a **resourceful, passionate and organized** B2B technology marketer with 20 years experience and [previous work](#) in; market research, product & market strategy, and team development.

Having worked with teams from Boston to Billund, Paris to Providence (RI), and Berlin to Bengaluru, Jane founded JEM 9 Marketing Consultancy to **assist business and marketing leaders in ambitious B2B organizations better understand and reach customers.**



Jane Morgan  
[Jane On LinkedIn](#)

***"Would benefit from an experienced B2B tech consultant let's talk about working together? My passion is helping you succeed."***