

12 Rules for Case Studies That Actually Work

My field guide from decades of writing them: as an in-house team manager/editor, inside an agency, and now on my own.

Case studies move the sales needle faster than almost anything else in a B2B marketing toolkit. I spent more than twenty years as the corporate communications lead for a global technology manufacturer, several more inside an agency, and I'm now an independent writer and ghostwriter for technology and security brands. Somewhere in there, I've written or shepherded more than **500 case studies**. It's some of the most rewarding work I do, and also some of the most consistently misunderstood.

01 EDUCATE, DON'T POSTURE

Case studies work precisely because they're mostly free of marketing hype. Buyers are naturally skeptical of vendor claims. A case study earns trust by being useful and educational first, and promotional a distant second. The moment it reads like an ad, it stops reading like proof.

02 KNOW YOUR WHOLE AUDIENCE

A case study travels further than end users. Integrators, resellers, specifiers and consultants, distributors, procurement teams, C-suite decision-makers, industry analysts, and trade editors all read them, often digging deeper into a story than any single audience would on its own. Layer the piece accordingly: a decision-maker's takeaway up top, the operational detail further in, so nobody has to dig for their version of the story. Write it with a journalist's sensibility: clean, AP-style, evidence over adjectives. Done well, it can pull in press coverage on top of sales.

03 DIFFERENTIATE, DON'T JUST DEMONSTRATE

Beyond proving a solution works, a case study is one of the few materials that lets a company show its point of view, its culture, and the genuine voice of its leaders and partners. That's differentiation a spec sheet can never deliver.

04 WRITE FOR SHELF LIFE

A story anchored in the problem and the relationship, not buried in technical detail, stays relevant for years. That's what earns organic search traffic, interview requests, and new partners long after publication, making a good case study one of the best-returning assets in the toolkit.

05 INTERVIEW FOR THE STORY, NOT THE SPEC SHEET

Specs already live in the proposal. Before the first question, walk in with a hypothesis for why this story matters: the scale, an unusual use case, a brutal environment, an unlikely integration. You might be wrong, and that's fine, but there should be a reason. Then use the interview itself to establish the before: what wasn't working, why it mattered, and what finally pushed them to act. Readers aren't looking for your product. They're looking for a problem they recognize.

06 CAPTURE THE DECISION JOURNEY

Why did the customer choose this approach, and not something else? What criteria mattered, what alternatives did they weigh, and what concerns almost stopped them? A prospect reading the case study is usually working through those same questions in real time, which makes the decision itself as persuasive as the result.

07 THE CUSTOMER IS THE HERO

The most common mistake is making the vendor the star. The strongest case studies put the customer's struggle and victory front and center, told partly in their own words. Real, specific quotes beat sanitized ones every time, and the vendor is cast as the tool that helped them win, not the headline act.

08 NUMBERS BEAT ADJECTIVES

"Improved efficiency" convinces no one. "Cut deployment time by 42 percent" does. Anchor the story around a handful of real, verifiable metrics. The unplanned secondary benefits (fewer vendors to manage, better morale, a capability nobody asked for) are often what builds the longer-term trust.

09 PUT IT IN CONTEXT

The best case studies earn their place in a bigger story: the compliance pressure, the market shift, the supply chain reality the customer was navigating. A win that happens against real context reads as more credible than a win that happens in a vacuum. Context is what turns an interesting deployment into a story that matters beyond the one customer living it.

10 DESIGN FOR THE SKIMMER FIRST

Most readers scan before they read. Bolded pull quotes, clear subheads, and short paragraphs let the whole story land in thirty seconds for someone walking into a meeting, which, more often than you'd think, is exactly when it gets read.

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GUARD THE SPECIFICS

A case study isn't finished when the draft looks good. It's finished when the customer has verified the facts, quotes, and numbers, and is genuinely comfortable standing behind them, not just signed off under deadline pressure.

The same discipline applies to legal and brand review, where vague, hedge-everything language is exactly what gets waved through, and exactly what kills a case study. Fight for the real number, the real quote, the real name. A straight answer is the value every reader came looking for, whatever their title.

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NEVER END AT THE FINISH LINE

A reader at peak interest is a reader ready to act. Close every case study with a clear, low-friction next step, while their attention is still there. A dead stop wastes the best moment you'll get.

LET'S WRITE ONE

Need a case study
people actually
finish reading?

I write and ghostwrite case studies, bylined articles, and executive-voice content for technology brands, including security and Pro AV. If you're planning a case study or wondering why your current ones aren't landing, I'd like to hear about it.

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