



SHAPA PAPER 22

How to Prepare a Case Study

Case Studies

1. Why prepare Case Studies?

- a. A key aim of marketing is to promote a company's products and services to those who can use them.
- b. Creating 'awareness' is critical. Potential customers cannot buy your products if they don't know that your company or your products exist!
- c. Awareness is created through:
 - i. Existing equipment performing well.
 - ii. The sales team contacting potential customers.
 - iii. Advertising in technical publications.
 - iv. Editorial in technical publications.
 - v. Your website and the search engines.
 - vi. Targeted marketing via mail-shots (whether by e-mail or the post).
 - vii. Exhibitions.
 - viii. Advocates.
- d. Editorial in technical magazines is usually free and is often seen as more authoritative than other forms of promotion.
- e. Many SHAPA members' problem is that their product development is evolutionary and, therefore, there is rarely much opportunity to grab the headlines in that direction. However, your products are likely to be used in a number of interesting and beneficial ways by companies of all shapes and sizes – often making for interesting reading. This is critical 'fodder' for the technical magazines. Bear in mind that, whereas magazine readers only 'see' adverts, they 'read' editorial! And, without editorial, no one would read a magazine containing just advertisements. So, editors are always hungry for good material.

2. Objectives

- a. To create interesting and informative written material extolling the virtues of SHAPA members' equipment and customer service.
- b. To use such material as an integral part of SHAPA members' promotional activities:
 - i. Primarily for publication in technical magazines.
 - ii. For use in the Case Study section of your website.
 - iii. To include in your regular Newsletters.
 - iv. For flyers in target/direct marketing to specific/relevant customer groups.
 - v. As evidence that you have already done jobs successfully for similar/same applications and similar customers.
 - vi. To confirm that big name customers trust you and your products.
 - vii. The photos and captions can be used in brochures.
 - viii. For exhibition posters.
 - ix. For rep/agent training.

3. What's in it for the customer?

- a. It's a question that you should always be ready to answer when you are asking a favour of a customer.
- b. In my view, these are some possible answers (it might be appropriate to choose just those you consider most pertinent to the customer/contact in question):

- i. Point out that the 'x' thousand (check latest circulation data) readers of the magazine(s) you plan to use are potential customers (this is more likely to be true for consumer products that say for an application in the Nuclear industry). So, it's publicity for them and their products too.
- ii. If they are suppliers themselves to major name companies, it is confirmation that they are investing in top quality equipment to meet the demands of such customers.
- iii. It might help to 'position' the company as a major player/leader in technology in their industry.
- iv. If all else fails, tong-in-cheek, suggest that it might get the contact on this year's Christmas bottle list!

4. Methodology

- a. Identify cases where your company's equipment has:
 - i. Solved a problem for a customer.
 - ii. Increased a customer's production capacity.
 - iii. Improved efficiency and/or lowered production costs.
 - iv. Replaced unreliable equipment of other (competitor's) manufacture.
 - v. Been purchased by a well-known company whose name and reputation will in some way endorse your company's reputation/equipment.

- b. Contact the customer to seek permission to prepare a case study:
 - i. Give the customer total assurance that they will have full control over what is written, together with the photography to accompany the text - prior to it being released to the press and/or appearing in literature and/or being uploaded onto your company's website.
 - ii. **It is critical that you ensure the customer contact giving permission for the case study to proceed is in a position to approve the content of the case study and give written approval for its use. Alternatively, ensure the contact has direct contact with someone above him who can approve the content of the case study and give written approval for its use.**

The above is all best done by letter or e-mail. Create a standard format that can be used time and time again. If your contact appears unsure about what a case study is or looks like, point them to any case studies already on your website and/or send him a copy of one of your case studies (failing that, one of some other, non-competitive company) previously published in a magazine.

Give the contact a couple of days and then follow up the letter with a 'phone call (the letter should say that you will be calling):

- 1. To ensure he/she has the letter.
 - 2. To learn whether your contact and/or their superiors are happy for you to prepare the case study.
 - 3. To make the arrangements for you to visit site.
- c. Before visiting the customer, gather all the background information available from existing company files and from the sales engineer or agent who made the sale. Look at the customer's website as there may be a wealth of information there - some of which your contact may not be aware and/or know that it is in the public domain already. This applies

especially to facts and figures about the company's turnover and/or output. Also, gather any information available from the Test Centre and/or the installation team if the equipment was tested, installed and/or commissioned by your company.

- d. When visiting the customer's site for your write-up, either gather or confirm (if you think you have the answer already from internal files/customer's website) the following information (but, first reassure the contact that it is a risk free exercise given that all information they give will be treated in confidence and that they will have the opportunity to remove anything from the proposed case study that they, or their superiors, would rather not be released into the public domain).

Point out that it is your job to help win new customers for your company - not lose them business by upsetting existing ones! This comment usually puts the contact at his or her ease!

At all times be vigilant and ready to write down any laudatory comments that the customer makes about your company, its service, people and equipment:

- i. Identify the nature of the customer's business.
- ii. Record details of their brand names under which the products are sold.
- iii. Obtain some details about the company's turnover and/or output (tonnage or number of units/hour/day/week/year).
- iv. Number of employees.
- v. Locations of other sites.
- vi. Date when the business was established.
- vii. Any historical details about the company or its products that will make the case study all the more interesting.
- viii. Who are the company's customers. Are they local, national and/or international. Are there any big names you can mention?
- ix. Why the customer bought the equipment in the first place.
- x. The duty it is performing (including where it fits within the production, handling or storage process). Make sure you understand this well - as it forms a key part of the case study.
- xi. The product(s) it is handling.
- xii. The capacity of your equipment (tonnes/hr, bags/hour, etc).
- xiii. The number of hours/day and the number of days/week your equipment is working.
- xiv. The benefits that the new equipment is affording the customer.
- xv. Why the customer choose your company to supply the equipment.
- xvi. Which others did the customer consider (get names but say that the competitors' names will not appear in the written case study – they are just for our internal information).
- xvii. Did the customer come to your company to conduct/witness trials in your Test Centre and, if so, how much did the results influence their buying decision.
- xviii. Did the customer do trials with anyone else.
- xix. How did the customer become aware of your company in the first instance.
- xx. Try to identify which business publications are read by your contact and/or in which publications the customer advertises their products. These may help ensure the widest possible publication of your case study.

- xxi. Last but not least, if the customer has not made a laudatory comment or statement about the way your company's equipment or employees have performed, encourage him to make one! A customer's statement is the only vehicle by which you'll get a complimentary comment about your company and/or its equipment published. You can, of course, include beneficial factual details such as 'The new *your company name + product name* has enabled *customer name* to increase capacity by 300%'.
- e. Whilst on site take the following photographs:
- i. Outside of the factory.
 - ii. Close up of the company's name and/or logo as it appears on signage on or around the exterior of the factory.
 - iii. General shots of the production area in which the your company's equipment is installed. NOTE: Your case study request letter or e-mail should also point out the importance of the equipment and the surrounding area looking clean and tidy BUT, take a look and make suggestions where additional cleaning or tidying should be actioned before you take any photos. (Buckets, mops, paper notices taped to equipment, heaps of spilled material, excessive dust, etc, etc all make for a disappointing photo if not removed beforehand). Offer to help tidy up as appropriate BUT not without a dust mask if necessary! Take shots from as many directions as possible and also from high up vantage points when possible. Also try shooting the equipment looking upwards from floor level. This is particularly effective in dusty environments as in such shots the dust, which lays on horizontal surfaces, is less visible.
 - iv. Close up shots of the key elements of the equipment, such as bag massagers on bulk bag dischargers or the grinding medium of a mill if the inspection door can be opened for you.
 - v. Where operatives are involved such as emptying sacks into a sack tip station, rigging empty bags onto bulk bag fillers, loading full bags onto bulk bag dischargers, ask your contact to organise an operative to cooperate with you. Such an operative must be properly attired as the company would have them be - with clean overalls/hairnets/face masks, any unauthorised jewellery removed and wearing all required personal protection equipment.
 - vi. Where the use of your company's equipment involves a series of steps (such as loading a full bag into a bulk bag discharger by forklift truck), try to get the operative to run through the process – giving you the chance to take a photograph at each stage. Alternatively, take a digital video from which you can extract stills. The video can then be used in the appropriate section of your website. A series of still photographs can be great for brochures or even Operating Manuals.

5. Write up the case study

- a. Aim to make the case study factual but as interesting as possible BUT without any laudatory comments. The only way that you can 'sneak-in' a laudatory comment is, as mentioned above, if it is included as a quote made by the customer!
- b. Once written up (and agreed within your company as appropriate), the case study and the supporting photographs (with captions) should be submitted to your customer contact for approval. If approval is given verbally by 'phone than make a contemporaneous note on a printed copy of the case study and keep it in your file. Similarly, copies of written approvals

should also be kept on file.

- c. Should the company have a 'change of heart' about the case study being released, then re-write it without mention of their name and, instead, using appropriate descriptions such as 'one of the UK's leading producers of ' or 'a specialist manufacturer of based in the north of England'. Then resubmit it for approval in the hope that they will agree to it being released in that format. Clearly, any photographs accompanying the revised text would also have to be devoid of any reference to the customer and, again, approved by them.

6. Distribute the case study

- a. I often chose to release a case study to meet the requirements of a specific editorial subject. Thus it is critical to have a chart indicating all the forthcoming editorial features planned by the publications of importance to your company.

I quite often sit on good case studies in order to await a key feature. There is nothing worse than a magazine running a feature on the type of product offered by your company with nothing included from your company!

If you confirm to the Editor that they are getting the case study first and that it will not be issued to others until after they have published, this will often encourage use of your piece in its entirety.

- b. Once published by your preferred title, the case study can then be released to others but, do ensure that it is released only to relevant titles (no case studies about a quarry application to food titles for example!).
- c. Do ensure that you send your contact a copy of the publication that publishes the case study. This is another opportunity to thank your contact and to help keep your company's name at the forefront of their mind.
- d. Distribute copies of case studies to:
 - i. The sales team (in the form of a flyer).
 - ii. Your network of reps/agents.
 - iii. To SHAPA for their news page.
 - iv. As a mailer to appropriate target customer groups.

7. What next?

- a. Watch out for enquiries that result from the case study.
- b. Crack-on with the preparation of some more!

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