

Case study

Everything a customer story needs before anyone writes it: the facts, the numbers, the quote and the customer's yes. Fill in fields 1 to 4 during the interview, and the rest as soon as the data comes in.

Customer

Main contact (name and title)

Writer

Interview date

1 Customer snapshot

The facts a reader checks first, to decide whether this story is about a company like theirs.

Industry and region

Size (staff or revenue)

What they use from us

2 The challenge

What was going wrong before, in the customer's own words, and what it was costing them in time, money or risk.

What they tried before

Why it had to change now

3 Why they chose us

The options they looked at and the reason they picked you, because buyers reading this are making the same choice.

Other options they considered

The deciding reason

4 What we did

The steps in order, with dates and who was involved, written the way you would explain it to a peer.

5 Results, with numbers

Before and after, with the time period and where each number comes from, so a skeptical reader can trust it.

What we measured	Before	After	Time period	Source

Results that are harder to count (fewer escalations, a calmer launch, time back for the team)

6 The quote

One or two sentences that sound like a person talking, approved word for word by the person quoted.

Name, job title and company, as they want it printed

Approved word for word on

7 The headline

Write it last: who the customer is and what changed, in one line a buyer in their shoes would click.

8 Approvals and where it can appear

Who must say yes on each side, and where the story may run; start this the day after the interview.

Customer side (name and date)

Our side (name and date)

Main contact

Account owner

PR or legal

Marketing lead

Where it can appear (website, sales deck, ads, press)

Worked example

A filled case study for a software rollout

A sample to show the level of detail that works. The company and the numbers are illustrative.

1 Customer snapshot

Regional grocery chain, US Midwest.

46 stores and 1,800 staff.

Our shift scheduling software, in every store.

2 The challenge

Store managers spent about five hours every Sunday night building schedules in spreadsheets. Gaps were filled with last-minute overtime, which ran 14% over plan last year. A payroll add-on was tried and dropped.

3 Why they chose us

Two larger workforce suites, and the scheduling add-on from their payroll provider.

Managers learned it in one training session, and staff could swap shifts on the phones they already had.

4 What we did

Pilot in four stores in March, with one 90-minute training per manager. The other 42 stores went live in three waves by the end of June, with a weekly call between our onboarding lead and their operations team.

5 Results, with numbers

What we measured	Before	After	Time period	Source
Manager hours on schedules, per week	5	1	March to September	Manager survey
Overtime against plan	+14%	+3%	Q3, year on year	Payroll data
Unfilled shifts per store, per week	9	2	Q3, year on year	Scheduling system

6 The quote

"Sunday nights used to be for schedules. Now I finish them on Thursday in half an hour, and the 6 a.m. calls about empty shifts have stopped." Store manager, approved by her and the operations director.

7 The headline

How a 46-store grocery chain cut overtime and gave its store managers their Sunday nights back.

8 Approvals and where it can appear

Customer: operations director and comms team, by October 9.

Ours: account owner and marketing lead, October 10.

Website, sales deck and LinkedIn ads. No press releases.

Visuals to collect

Ask for these in the interview, not after the draft.

- ☐ The customer logo, as a vector file.
An SVG or EPS from their brand team, with written permission to use it.
- ☐ Two or three photos of real people and places.
Their team, their site, the product in use. Stock photos make a true story look made up.
- ☐ A screenshot or chart that shows the result.
One clear before-and-after visual does more work than a paragraph of numbers.
- ☐ A short video clip, if they are open to it.
Even 30 seconds of the customer talking can be cut for social posts and sales calls.

Before you publish

Three checks that keep the story credible and the customer happy.

- ☐ Every number has a time period and a source.
"Cut costs by 30%" reads as marketing. "30% over two quarters, from payroll data" reads as fact.
- ☐ A buyer can see their own situation in the first lines.
Industry, size and the problem near the top let readers decide fast if it applies to them.
- ☐ The customer approved the final version, not a draft.
Edits after approval are how quotes drift and goodwill gets lost.

The customer interview, in 30 minutes

Record it with permission. Quotes from a transcript beat quotes from memory.

- 0 to 5** Their role and their company
Confirm the snapshot facts now, so you do not chase them by email later.
- 5 to 15** Before: the problem
Ask what a bad week looked like. Specific stories make the best quotes.
- 15 to 25** After: what changed
Ask for numbers and where they come from, and agree who sends the data.
- 25 to 30** Approvals and visuals
Ask who signs off on their side, and request the logo and photos.