

RSW/US

New Business Solutions for Marketing Agencies

The Case for Case Studies

Showcasing Work for New Business



The Purpose of Case Studies

In the new business arsenal, what niche does a business case study fill?

Is it an introduction?

It can be, but your website's homepage does a far better job communicating who you are and what your agency stands for.

Is it a showcase of your creative team's design chops?

Perhaps, but the work you've done for your clients will speak far louder.

Your case studies should do one simple thing: prove to a prospect that you're worth the time it takes to write an email, pick up the phone, or reply to a LinkedIn message.



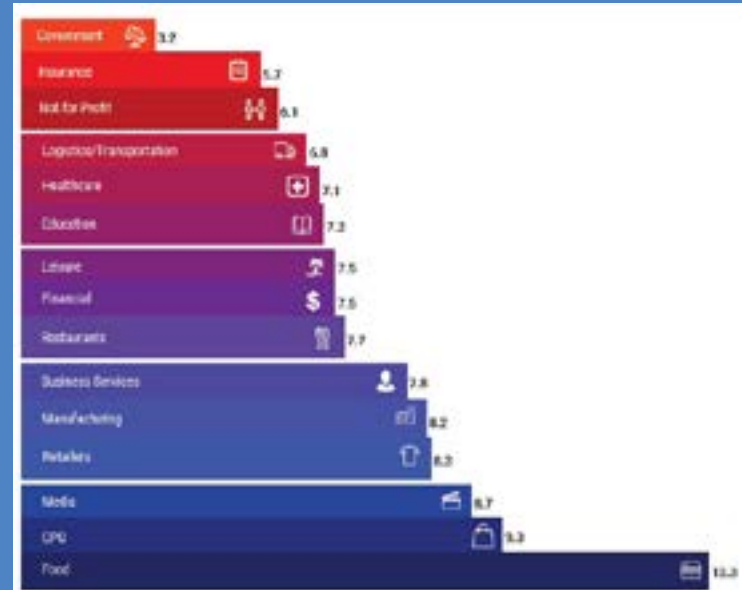
Case Study Form Follows Function

In agency new business, the first or second interaction with a prospect rarely ends in a win. In fact, though it varies by industry, it takes an average of 7.6 touchpoints with a prospect to snag a first meeting. Agency new business is a game of inches, not yards; success depends on consistent and persistent effort.

Taking that into account, case study design should prioritize sharing the maximum amount of information in the shortest amount of time possible. Descriptive headlines, concise copy, and bold results will make a case study easily scannable - presenting the key takeaways of the subject and whetting the prospect's appetite to learn more and schedule a meeting with you.

Countless agency new business case studies have surely died quietly in committee, as team member after team member has tweaked, embellished, and tacked on "just one more thing." Case study design is truly an instance where perfect is the enemy of good.

Average Number of Touches to Get a Meeting - By Industry



As we've known since starting our business in 2005, an agency new business program takes polite persistence, a value-added approach to outreach, and solid content to win the day.

On Format...

One of the most common questions we see from clients is what form the case study should take. Some agencies will prefer web-based or video case studies, while others might argue that a static case study such as PDF or even a printed mailer is obsolete.

In a perfect world, you would have the time and resources to create all three. Online case studies, PDFs, and video case studies all have a place in your sales pipeline.

Online:

The very top of your funnel. It lives on your webpage, where prospects are exploring to learn more about your capabilities and work. Keep it broad and concise to offer a taste of what you do.

PDF:

If they're interested, a prospect will click through and read a PDF after a few touchpoints. This format is easier for prospects to share with their teammates, and can be more focused on a specific aspect of your work.

Video:

Best saved for follow-up. Once a prospect has engaged or spoken to you, they'll be much more likely to invest 1-2 minutes of their time to stop and concentrate on a video.

For a deeper dive, read: [RSW Agency New Business Case Study Series: Picking A Format](#)

According to Demand Gen, 64% of respondents share case studies with colleagues, which is second only to blog posts (74%).

Who is Your Case Study For?

The first step in case study creation begins long before gathering testimonials or choosing fonts. In fact, it begins the moment you embark on your agency new business venture with positioning and targeting. You'll want to answer a few questions up front.

Who are your prospects?

What industry sectors are you targeting? What titles are you reaching out to? Establishing this early will not only help guide your choice of the most relevant subject for the case study, but will determine the language, metrics, and aspects of the work that you'll highlight.

What are your target prospects dealing with?

Place yourself in the prospect's shoes. The more they can see their own challenges and pain points mirrored in a case study, the more likely they are to believe that your agency's approach will suit their needs.

What are relevant keywords for your prospects?

You have a lot to communicate in a short period of time. The right words can convey your knowledge of the industry and market.

Strategically used, industry/role-specific language will develop trust and establish you as an insider who understands their world.

Be cautious of overuse, however. Too much jargon will dilute its meaning and erode trust, rather than build it.

For a deeper dive, read: [RSW Agency New Business Case Study Series: Finding](#)

Gathering What You'll Need

Now that you know who you're writing for, it's time to start gathering the pieces you'll put together.

Story

- A success story your audience will identify with - focused on pain points relevant to the targeted industries.
- Stories from large, well-known clients.
- Strong results and metrics.
- Qualitative results - increased brand awareness, campaign expansions, on-going work, insights learned.

Visuals

- Logos - use your client's logo, and put it up top so that it's one of the first things seen. Your logo should also be near the top, close to the title.
- Examples of creative - choose examples that best demonstrate the breadth of work and heart of the campaign/messaging. Don't go overboard with variations on the same theme - if you created 100 pieces of creative for a campaign, choose a few pieces that showcase the breadth.
- Icons and Graphics - if you don't have creative to showcase, icons and graphics are a good way of breaking up the text and visually signaling which parts are important.

Pull-quotes & testimonials

- Be selective in quotes and testimonials you showcase. Use quotes from meaningful titles and decision-makers (preferably the same level as your prospect!).

A Note on Copy

Keep it simple and brief - between 300-1200 words. You don't need to tell the whole story and all the details. Leave room for follow up in order to entice the prospect into wanting to speak to you more.

Remember - This is your client's story that you enabled. A prospect cares first and foremost what you can do for them, so write your case study in a way that makes them see themselves in your client.

What if I Don't Have Quantifiable Results?

Many agencies struggle to show ROI because they “don't have results”. Surely, however, there was an outcome to the work and, if you've chosen to write a case study about it, a positive one at that. Depending on your type of agency and the nature of the work, there are several approaches to consider.

Contrast the before and after.

How was the client's situation before the work and then after the work was completed? Paint that picture.

List the number of projects you've done for the client.

While seemingly a simplistic solution, it shows that the work is good enough to merit a long-standing relationship.

Include testimonials.

The purpose of showing ROI metrics is to prove value, and what better way to prove value than to hear right from the source?

If you're a creative agency, don't skimp on breathtaking visuals.

We often tell agencies that they can't expect great creative alone to score them a meeting or a win, but it can sometimes be the factor that opens the door.

For a deeper dive, read: [RSW Agency New Business Case Study Series: If You Don't Have Results for Your Case Study, It's Time for a Pep Talk](#)

Anatomy of a Case Study - Putting it all Together

You have 5-10 seconds to grab a reader's attention, and maybe a minute beyond that for them to read the whole thing.

And while case studies can take many forms, depending on capabilities, services, and any NDAs with current clients, there are certain structural principles that apply almost universally.



LOGOs

Pithy Attention-Grabbing Headline

PROBLEM

tellus in metus vulputate eu scelerisque felis imperdiet proin fermentum leo vel orci porta non pulvinar neque laoreet suspendisse interdum consectetur libero id faucibus nisi tincidunt eget nullam non nisi est sit amet facilisis.

SOLUTION

nibh tortor id aliquet lectus proin nibh nisi condimentum id venenatis a condimentum vitae sapien pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas sed tempus urna et pharetra pharetra massa massa ultricies mi quis hendrerit dolor magna eget est lorem ipsum dolor sit amet consectetur adipiscing elit pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas integer eget aliquet nibh praesent tristique magna sit amet purus

CONTACT INFO

Headline: Capturing Attention

A few words summarizing the process and hinting at the results. Combined with the creative and results, this should give a solid impression of what you did for your client very quickly.

Readability Hints:

Less is more - white space is your friend.

Create a visual hierarchy using font size and graphics to make the piece easily scannable.



Body Copy: Detailing The Journey

While the section names may vary, the body of most case studies will contain 3 sections:

Problem

Describe your client's pain points in an empathetic manner. Make them the main characters of the story and help the reader see their own challenges mirrored in your client's challenges.

Solution

This is where you came in and saved the day! Summarize your strategy, execution, and any key findings.

Results

This is often the first thing a prospect will look for, so make this bold and eye-catching. Use meaningful metrics and KPIs: one or two strong data points showing overall impact are more effective than 5 "fluffy" outcomes.

For a deeper dive, read: [RSW Agency New Business Case Study Series: Case Studies Aren't About You](#)

LOGOs

Pithy Attention-Grabbing Headline

PROBLEM

tellus in metus vulputate eu scelerisque felis imperdiet proin fermentum leo vel orci porta non pulvinar neque laoreet suspendisse interdum consectetur libero id faucibus nisi tincidunt eget nullam non nisi est sit amet facilisis.

SOLUTION

nibh tortor id aliquet lectus proin nibh nisi condimentum id venenatis a condimentum vitae sapien pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas sed tempus urna et pharetra pharetra massa massa ultricies mi quis hendrerit dolor magna eget est lorem ipsum dolor sit amet consectetur adipiscing elit pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas integer eget aliquet nibh praesent tristique magna sit amet purus

RESULTS

400%

400%



CONTACT INFO

Conclusion

In addition to the points discussed here, it's important to keep in mind that above all else, case studies are a numbers game. Rather than allowing "perfect" to be the enemy of good, arm your new business team with a variety of solid case studies across channel, client, and capability. From there, trust your new business director to be strategic in how they're deployed, and as with any outreach efforts, be persistent in your follow-up.

And while case studies are a critical piece of the new business puzzle, they're still just that: a piece, useful only in combination with your other methods of holistic outreach. We hope you found these tips useful, and that they prove to be effective in your agency new business prospecting.





Mark Sneider

Owner/President - RSW/US

6725 Miami Avenue, 2nd Floor | Cincinnati, Ohio 45243

mark@rswus.com | 513-559-3101