How to write a *client-winning* CASE STUDY

PRESENTED BY

energise
Marketing Agency

Step 1. Select your project

Choose a project that demonstrates both what you do and how well you do it.

Look for work that:

- Represents your core services
- Solved a specific client challenge
- Had measurable outcomes
- Shows your values or approach in action

If the project was particularly complex or required collaboration across multiple teams, even better – this gives you more angles to showcase.

Step 2. Ask permission

Never publish a case study without your client's approval.

Before writing:

- Contact your client and explain what you'd like to publish
- Share a draft before going live
- Be clear about where and how it will be used (website, LinkedIn, proposals etc.)

This builds trust and often leads to stronger quotes and future referrals.

FUN FACT

73% of B2B buyers consider case studies to be the most influential type of content when making purchasing decisions - techstiks.com.

Step 3. Structure the story

Use a simple, proven format:

- **Headline:** Make it benefit-focused – e.g. "How [Company] cut their onboarding time in half with [Your Service]"
- **The challenge (Problem):** What wasn't working before? What prompted the client to seek help?
- **The approach (Solution)**: What did you do? Describe your process in 2–4 steps.
- **The outcome (Result):** What changed? Be specific – use numbers or tangible outcomes where possible.
- **The proof (Client quote):** Include a direct quote from your client backing up your success.

Step 4. Write with style

Keep it sharp, confident, and human:

- Use short, active sentences: "We redesigned the platform and trained 12 staff in 2 weeks.".
- Avoid jargon and marketing fluff.
- If there were bumps along the way, mention them – it makes the result more real.
- Cut anything that doesn't support the main story.

FUN FACT

77% of B2B marketers use case studies as part of their content marketing strategy - techstiks.com

Step 5. Share your case study

Once it’s live, don’t let it gather dust. Get it working for you.

Use it:

- On your website: Optimise it for your service keywords.
- In sales proposals: Especially when the project aligns with the client’s needs.
- In award or funding applications: Proof of real-world impact.
- On LinkedIn: Tag your client and highlight their success.

READY?
LET'S DO IT!

FUN FACT

88% of marketers consider case studies to be the most effective type of B2B content marketing - extu.com

CASE STUDY WORKSHEET

1. Project details

Client name:

Industry:

Project name or title:

Date completed:

Main service(s) delivered:

2. The challenge

What problem was the client facing before working with you?

Why did they seek your help?

3. The approach

What did you do to solve the problem? Break it into 2–4 steps.

List any tools, systems, processes or partners involved:

4. The result

What changed for the client after the project?

Do you have any measurable outcomes (e.g. time saved, cost reduced, revenue increased)?

5. Client quote

Write or request a short testimonial from the client (1–3 sentences):

6. Permission

Has the client agreed to have their project profiled?

☐ Yes ☐ No

Are the any restrictions on what can be shared?

Thank you for downloading

How to write a client-winning case study

We'd love to hear how you get on. And of course, should you need any help, you know where to find us...

CONTACT DETAILS:

energise.net.nz

rosina@energise.net.nz

021 703 859