



CASE STUDY QUESTIONS:

**How to get  
satisfied customers  
to make a case for  
your brand**

QUESTIONS

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## In-person, via phone and video chat, or via email?

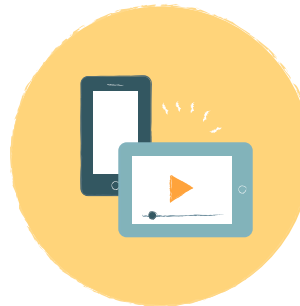
Each interview format has its pros and cons:



### IN-PERSON

**Pros:** Face-to-face interactions, unrehearsed answers, non-verbal cues, visual elements such as physical setting that can be useful for storytelling.

**Cons:** May require travel, some interview subjects might give better answers if they have more time to think about them; also, some people get frazzled or camera shy in cases of video testimonials.



### PHONE AND VIDEO CHAT

**Pros:** Easy to ask follow-up questions or probe for more detail, more conversational than email interviews, no travel required, easy call recording.

**Cons:** No non-verbal cues if the conference doesn't include video, harder to interject and control the conversation, you don't get to place the subject in a scene.



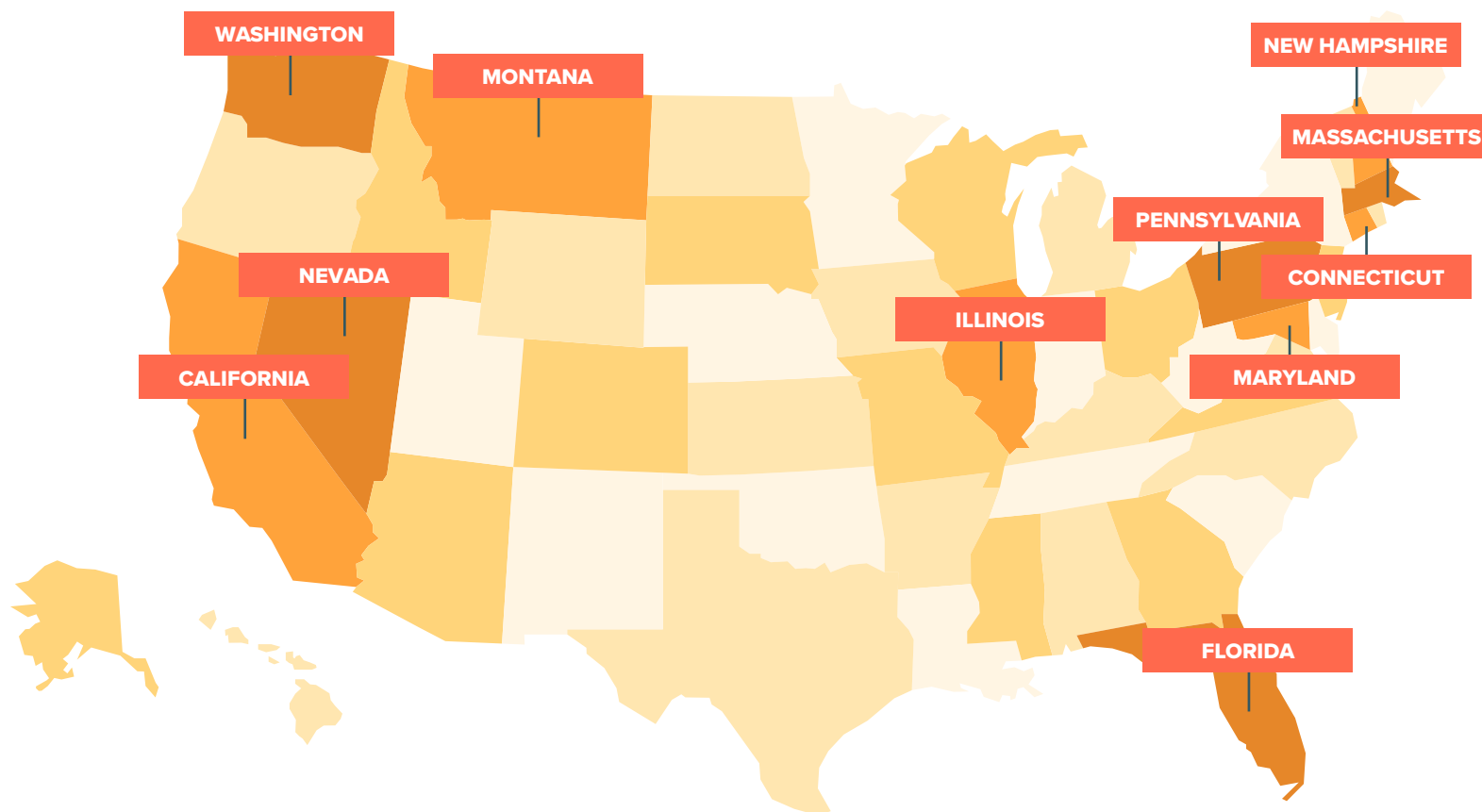
### EMAIL

**Pros:** Ample time to ponder on each question, no need to record or take notes since everything is written down, less planning involved than for the other methods.

**Cons:** Less room for conversational back-and-forth, harder to really capture the voice of the person you're interviewing, responses can be terse or may sound overly formal.

An in-person interview is almost always ideal, and is necessary if you're creating a video case study or testimonial. However, video chat or phone interviews work for most written case studies that won't include video testimonial. The call recording feature is particularly useful for recall and the collection of direct quotes.

Just remember that some states **require permission to record calls**:



And even in states that don't require permission, it's a best practice to **always ask before proceeding with call recording**. Once you've started recording, confirm that everyone is OK with it on the line so you have a record of consent.

## Planning your line of questioning

Every case study has a few core components that your questions can be constructed around:



### 1. INTRODUCTION

Setting the scene, or providing background on the company.



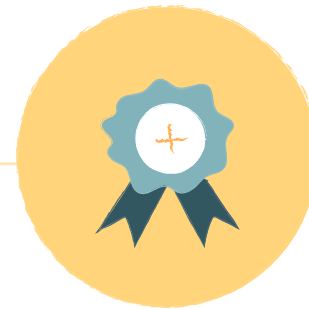
### 2. PROBLEM

Presenting the issues that need to be resolved or addressed.



### 3. SOLUTION

The measures taken to solve the problem.



### 4. BENEFIT

The outcome of those measures.



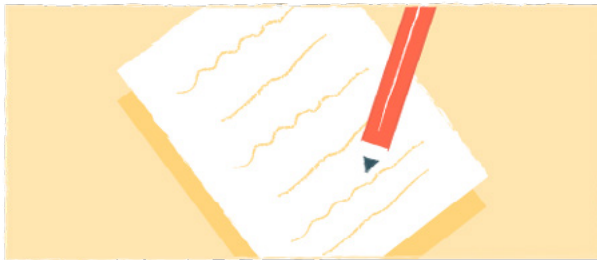
### 5. LOOKING AHEAD

How the company continues to benefit, and how they may benefit more in the future.

Try to avoid asking questions that you easily find online via the company's website or on LinkedIn. Remember that you're taking time out of this person's day. As an interviewer, it's important to make the most of the minutes you have with your subject.

## A few key factors to keep in mind

Before we dive into specific case study questions, let's review tips and tricks and general considerations as you plan your interview:



Write down your questions and the order in which you wish to ask them. You don't have to stick to this list rigidly, but they can help you get back on track as the conversation meanders.



Take notes, and be sure to mark the time in the recording when you hear something quoteworthy. It makes your life easier later on.



Have a sense of the story you want to tell ahead of time. This will help direct the type of information you ask for.



Ask follow-up questions as needed.

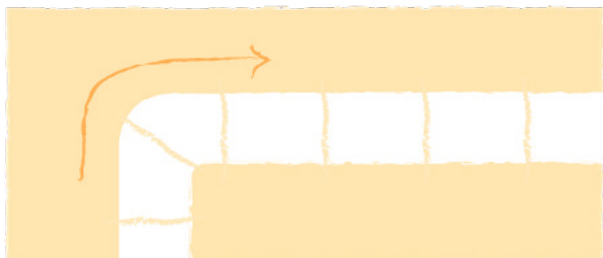


Ask open-ended questions. They're great for getting quotes, and can be especially useful for the less verbose subjects.



Get permission to quote the interviewee directly.





Pivot your angle and tweak your line of questioning as you go if the story turns out to be different than you envisioned.



Interject if the interviewee rambles or digresses. You only have so much time to get through your questions.



Be clever as you dig for quotes. For instance, use a particular phrasing or analogy in a follow-up question and your interviewee will likely mirror that language in their answer.



Be sensitive and non-judgemental. This is particularly true for B2C brands, which may be oriented around personal goals as opposed to organizational goals.



More detail is always better than less. Yes, it's more to wade through later on, but it's preferable to learning you don't have enough when you sit down to start writing.



Thank your subject for their time, as there are almost certainly better things they could be doing with it.

With all of this in mind, let's move on to some examples of case study questions. Note that this is by no means an exhaustive list of questions, and we wouldn't necessarily recommend asking all of them verbatim. **Use them as inspiration to get you started.**

*Provide us an overview of your company and your role and responsibilities in it.*

*How big is your department or your team?*

*Tell us about your target customers and the clients you work with. What do they care about most?*

*What are some of the issues that are unique to the industry you operate in?*

## 1. Background questions

If you're operating in a B2C market take a similar approach. Ask **open-ended questions** to get a foundation of who the customer is. For instance, "tell us a little bit about yourself."

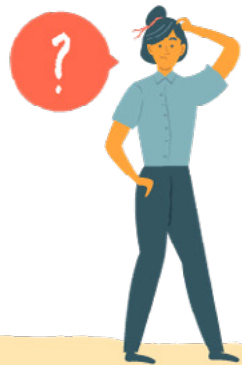
Always be on the lookout for follow-up questions that can help color your narrative. They give you more to work with as you start writing your case study.



## 2. Problem questions

B2C brands might ask similar questions with minor adjustments. For example, instead of asking about morale or customer satisfaction, tailor questions around relevant pain points. A mortgage lender, for instance, might ask about some of the concerns that a homebuyer had going into the process, and how they had been dealing with that.

Think of the purpose of your problem questions as a way to **fully understand the conflict and what was at stake.**



*What drove you to seek out a partnership with our brand?*

*Can you elaborate on some specific pain points you were experiencing?*

*Explain how you were previously dealing with those issues. What was the outcome of those efforts?*

*How did these issues affect morale, efficiency, customer satisfaction, etc.?*







## Conclusion

With all the facts and insights of the story in hand, there's only one thing left to do: **Go and write a case study.**

Remember to break up the copy with plenty of subheads, pull quotes, imagery and bulleted lists. Don't be afraid to slightly clean up direct quotes as long as you don't change the meaning of what was said.

If you have follow-up questions or need clarification, you can most likely reach out via email. Once your first draft is complete, share with the interview subject. Implement any changes, add in any design elements and begin using the asset as part of your content marketing strategy.

Any questions?





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