

Case Study Planner

Target:

Existing customers who meet the following criteria:

- Have been a long-term client
- Is a satisfied customers with no issues or concerns expressed
- Has a good relationship with their sales or support team member
- Represents the industry or client profile you're targeting with the case study

About the company

Company name:	
Years in business:	
Location:	
URL:	
Primary industry:	
Primary target market:	

Describe the problem the client was trying to solve when they found you or your product/ service.

What product/ service were they using before yours?

What products/ services did you provide? (Include product/ brand names, details of custom services, specific packages etc.)

What was the client's timeline? Was it achieved? If not, why?

What was the client's budget? Was it achieved? If not, why?

Describe the process of how you helped the client.

What were the outcomes? Did they achieve their goals? Were there other, unexpected benefits? What value did you bring?

What was the return on investment for the client?

Questions you can ask the client to secure a testimonial or to add to the case study:

1. What specifically is your favorite feature of our product/service and why?
2. What are two other benefits of our product/service that have had an impact on your business?
3. If you were to recommend us to another business, what would you say?
4. Anything else you'd like to add?