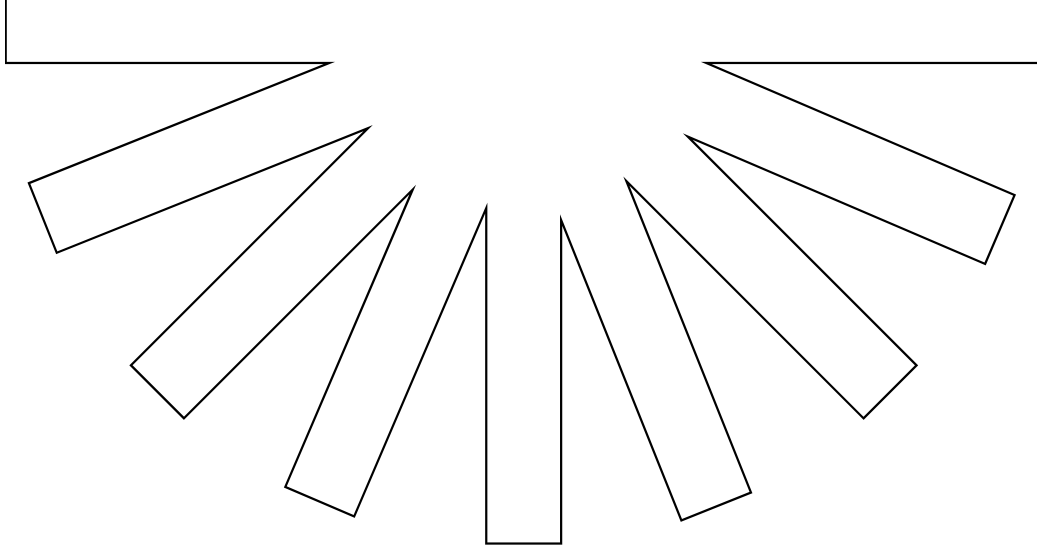


# A 6-Step Guide to Developing Impactful Case Studies

A PMMs Guide





# Introduction

Crafting impactful case studies is essential for product marketing teams aiming to drive sales enablement. This framework ensures that case studies remain authentic, avoiding scripted narratives while showcasing the real impact of the product. By balancing qualitative storytelling with quantitative insights, this guide helps create case studies that are both compelling and actionable.

# The 6-Step Guide

**Step 1: Define the Purpose of the Case Study**

**Step 2: Identify Internal Stakeholders and Use Cases**

**Step 3: Select the Right Customer for the Case Study**

**Step 4: Conduct the Interview**

**Step 5: Extract and Structure Key Insights**

**Step 6: Internal Enablement and Presentation**



## Step 1: Defining the Purpose of the Case Study

Key Focus: Establishing the need

- Identify the core reason for creating the case study (e.g., addressing objections, showcasing impact, educating prospects).
- Align with sales, product, and customer success teams to ensure relevance.
- Define key performance indicators (KPIs) that measure the study's success.

## Step 2: Identifying Internal Stakeholders and Use Cases

Key Focus: Internal alignment

- Determine who within the company will utilise the case study (sales, customer success, marketing, product development, etc.).
- Establish how different teams will leverage the case study (e.g., sales enablement, marketing collateral, training materials).
- Gain internal buy-in for a structured approach to ensure cross-functional alignment.



## Step 3: Selecting the Right Customer for the Case Study

Key Focus: Finding the ideal customer

- Identify a customer that represents an ideal user persona.
- Ensure the customer has experienced measurable benefits from the product.
- Verify the customer is willing to provide an authentic and unscripted narrative. A great place to start is by speaking with business teams that interact with customers daily such as support, sales, and customer success.

## Step 4: Conducting the Interview Process

Key Focus: Gathering insights naturally

- Prepare a structured yet flexible interview guide with a mix of qualitative (experience & storytelling) and quantitative (impact measurement) questions. Avoid leading questions.
- Maintain a conversational flow.
- Ensure all ethical considerations are put in place i.e. an appropriate adult is present for minors.



## **Step 5: Extracting and Structuring Key Insights**

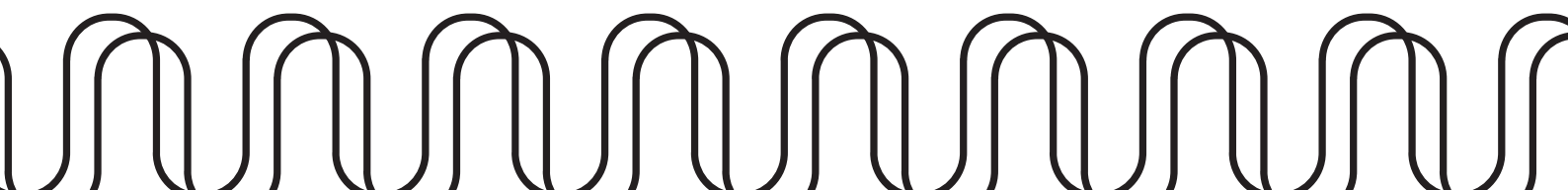
Key Focus: Presenting key takeaways

- Highlight transformative moments and quantifiable impact.
- Maintain the authenticity of the customer's voice while ensuring clarity.
- Extract key themes that align with the initial goal of the case study.

## **Step 6: Internal Enablement and Presentation**

Key Focus: Making the case study usable

- Develop an internal training session on how to use the case study effectively.
- Provide variations for different mediums (e.g., long-form article, video snippet, one-pager, slide deck).
- Gather feedback from sales and marketing teams to refine future case study efforts.



# Example Case Study: FinTech App for Teenage Financial Literacy

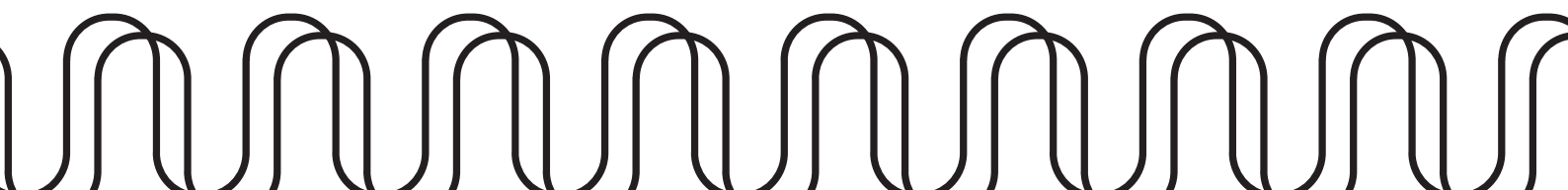


FinLearn is a fintech app designed to help teenagers develop financial literacy skills through interactive lessons and real-world simulations. Many teenagers struggle with financial concepts, leaving them unprepared for real-world money management. Sarah, a 15-year-old high school student, used FinLearn to gain hands-on experience in budgeting, saving, and investing. Her mother, Lisa, was present during the interview to provide additional context and insights.

## **Building the case study.**

### **Step 1: Defining the Purpose of the Case Study**

The marketing team identified that prospects often questioned the real-world impact of FinLearn on teenagers' financial education. The goal was to create a case study that demonstrated measurable improvements in financial literacy and decision-making. The success metric was an increase in conversion rates among parents and educators.





## **Step 2: Identifying Internal Stakeholders and Use Cases**

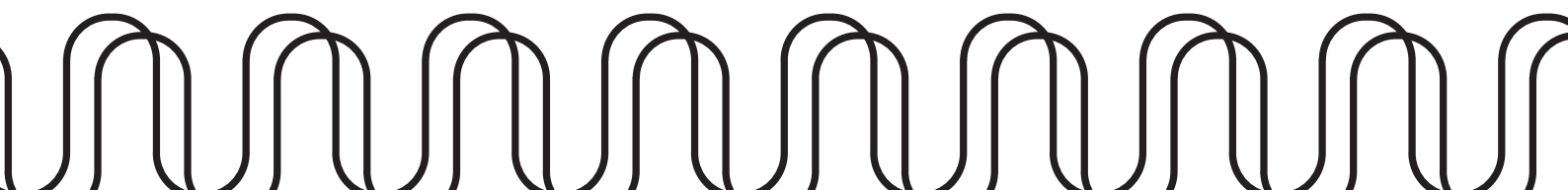
The sales and customer success teams confirmed that a compelling case study could help address concerns from schools and parents about FinLearn's effectiveness. Marketing would use the case study in email campaigns, sales decks, and digital ads.

## **Step 3: Selecting the Right Customer for the Case Study**

Support and CSM teams identified Sarah, a 15-year-old user, whose experience reflected FinLearn's core value proposition. Her mother agreed to participate, ensuring consent and contextual insights.

## **Step 4 4: Conducting the Interview Process**

A structured interview was conducted with a balance of qualitative and quantitative questions:

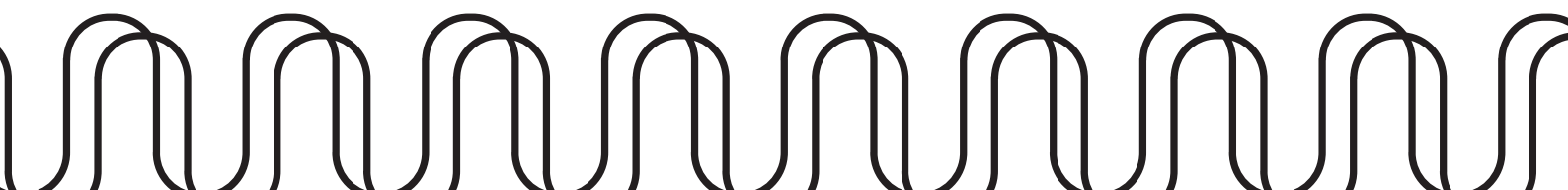


## **Qualitative Questions (Storytelling):**

- "Before using FinLearn, how did you approach managing your allowance?"
- "What was your biggest challenge in understanding financial concepts?"
- "How do you feel about managing money now?"

## **Quantitative Questions (Measurable Impact):**

- "Can you share how much you've saved since using FinLearn?"
- "How has your spending behavior changed in measurable ways?"
- "Have you applied any of the investment strategies from the app? If so, what were the results?"



## Step 5: Extracting and Structuring Key Insights

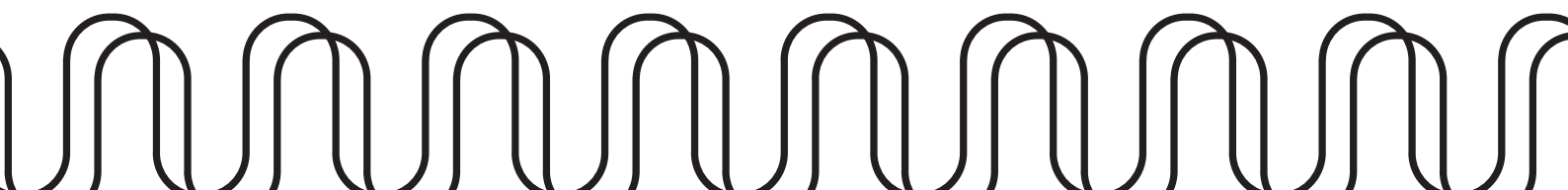
Key themes emerged from Sarah's responses:

### Qualitative:

- She initially had no structured savings habits.
- She became more confident in budgeting and prioritizing financial goals.

### Quantitative:

- She reduced unnecessary spending by 30%.
- She saved £200 over three months.
- She engaged in simulated investments, gaining early exposure to financial planning.



## Step 6: Internal Enablement and Presentation

The case study was formatted into multiple versions:

- A one-pager for sales teams.
- A testimonial video for social media.
- A blog post highlighting Sarah's journey.
- A slide deck for school partnerships.

Sales and marketing teams were trained on when and how to use these assets effectively, ensuring that the case study directly supported conversion goals.



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