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Marketing How-To Guide

Marketing How-To Guide:

How to Write a Case Study and Use it for Lead Generation

Exclusively for Premium members

MarketingProfs
Marketing How-To Guide

How to Write a Case Study and Use it for Lead Generation

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INTRODUCTION

In an age of heavy competition and buyer skepticism, prospective buyers need more information than ever to support purchase decisions—especially when it comes to technology purchases. Satisfied customers have always been powerful sales and marketing assets, but you can only call on your best customers to act as references so many times. Customer case studies provide the credibility, education and validation that buyers need to feel confident in selecting vendors and solutions, in a format you can use repeatedly.

Credibility

Case studies provide third-party evidence that establishes credibility in buyers' minds. Documented examples of prior customers' positive experiences with your company, products and services give buyers confidence that your solutions perform as promised. Moreover, it's been shown that buyers give more weight to independent reviews of products and services than they do to what the vendor says.

Introduction … continued

Education

Marketers and business owners put a lot of thought into how they communicate about their offerings. Yet, there's often a gap between descriptions of products and services and readers' understanding of how these offerings will perform in their environment—all the more so when the products or services are complex. Customer testimonials provide real-world examples of how solutions deliver in live work environments.

Validation

By highlighting actual results—preferably with metrics—case studies provide critical validation that helps prospective buyers justify purchases to themselves, their departments and their organizations. Proof that solutions provided a return on investment for other organizations helps buyers more confidently make the decision to purchase a specific product or service, and minimizes risk in their minds.

Moreover, surveys of technology buyers have found that case studies are one of the most widely read and preferred marketing and sales tools.

CASE STUDY PLANNING

When planning case studies, it's essential to match story development with your current sales goal. Planning helps ensure that the case studies you create support your objectives, and that you spend your marketing dollars in a way that nets the greatest return.

If you have created case studies in the past, start with an inventory of your current stories. Look at each and note which products and services are covered, as well as industries, customer sizes, geographies, business problems addressed and any other themes or value propositions.

Once you have a full inventory of current case references, assess which additional stories your organization needs to meet its objectives. Make notes about the elements of your existing studies that work well and which areas need improvement. With a clear idea of what you need to round out your inventory, review your budget and create an actionable "wish list" of cases to pursue. Prioritize the products/services, industries, geographies, company sizes and other themes needed to fulfill your wish list.

Finally, make sure that all team members who might come across a good case study candidate know how to recognize one when they see it. Provide guidelines for customer-facing employees and partners as to exactly what makes a great story for your organization.

ASK CUSTOMERS TO PARTICIPATE

Finding customers that are willing and able to be featured in case studies is typically one of the biggest challenges. The request can be as simple as a two-minute explanation and a simple "yes," or it can require months of finessing and speaking with multiple parties within the customer's organization. It's important to approach customers at the right time and with the right information.

Timing

The timing of your case study is important for several reasons. The best time to approach customers is when they are exceptionally satisfied with the products and services you delivered. Enthusiastic customers make for the greatest interview subjects. You'll want to capture their story when they have had the solutions long enough to have experienced the benefits, but not so long that the initial champions have left the company or can't remember the pains and problems associated with the previous solutions.

Ask Customers to Participate … continued

Approaching Contacts

As you begin the process of securing permission to feature a customer, start with your main customer contacts. Get their buy-in first since they'll be involved in interviews and reviews. You and your customer contacts will most likely need to secure official company permission to proceed. If you proceed with only the agreement of your main contacts, you run the risk that the customer's legal or PR team will later decline the story.

Be prepared with the information customers typically need upfront before agreeing to participate:

- Interview time required
- How and where the case study will be used
- A sample case study
- A copy of the legal release form that customers will sign

Selling the Case Study to Customers

Some customers immediately recognize the joint promotional aspects of participating in a case study, such as free publicity highlighting their best-practices efforts. For others, however, you may have to point out the benefits of participating—similar to the sales process. You have to find what motivates and interests customers and approach the case study from that angle.

Ask Customers to Participate … continued

For example, individual contacts may be interested in showcasing the benefits and measurable results of a specific project to other colleagues in their organization—especially if solutions contribute to the bottom line. A customer story that showcases successful decisions gives the individual(s) involved positive internal exposure. Customer organizations may also be interested in communicating certain messages to the marketplace, and a case study may provide just such an opportunity. With each customer, look for mutually beneficial ways to create a case study that helps both you and your customer meet your goals.

If you plan to pitch the case study to the media, submit it to a trade publication or enter the case study for an industry award, let the customer know. That kind of positive exposure can be the tipping point in their decision to participate.

INTERVIEWING

Effective interviewing is essential to the quality of a case study. You can't construct an effective story without all the necessary information.

Interviewees

Choose interview subjects wisely to maximize the impact of your case studies. Ideally, interview subject(s) should match the audience. If the audience consists of business decision makers, interview similar contacts at customer organizations. Likewise, interview technical contacts when technical people are your audience. When your audience is both IT and business people, include both in the interview process to gather information relevant to each group.

Question Design

Decide whether someone in your organization or a contract writer will conduct the interviews. It is advisable to create a set of written interview questions to ensure that the questions hit all the areas that are relevant to your organization. Additionally, this allows you to send the list of questions to customers in advance if they want to see them.

Structure your questions according to the format of Microsoft case studies.

- The Challenge
- The Solution
- The Benefits

Interviewing … continued

Ask open-ended questions to encourage your interviewee to provide details, rather than simple “yes” or “no” answers.

“Challenge” Questions

Before delving into specific questions regarding the customer’s need, gather some general information about the organization:

Q: Please describe your business. What products or services do you provide and to what types of customers?

Q: How long have you been in business?

Q: Where is your headquarters?

Q: How many locations do you have?

Q: How many employees?

Then move into what led the customer to look for the products and services you delivered:

Q: What are some of your organization’s goals and challenges?

Q: Tell me about some of the business objectives or needs that led you to look for a solution of this type.

Q: What was the business impact of not having a solution to address or accomplish this?

Q: Can you quantify the problem in any way?

Interviewing … continued

"Solution" Questions

Explore the customer's selection of the products and services:

Q: How did you hear about us?

Q: Why did you choose to work with our company?

Q: What made you choose to implement (_insert solution names_)?

Then move into service delivery or implementation questions:

Q: Please describe the implementation process.

Q: What value did we bring to the process?

Q: How long did it take, and how would that have compared to other options you considered?

Q: How would you describe the quality of the training?

Q: How quickly did your staff pick up the solution and begin using it?

Next, get into the details of how the products or services are used and/or delivered:

Q: How many people use the products/services?

Q: Across which departments and locations?

Q: In what key ways do you use the solution the most?

Interviewing … continued

"Benefits" Questions

Ask customers about the main business benefits they have experienced with the products and services.

> Q: *What would you say are the top three benefits you have seen as a result of implementing the solution(s)?*

From there, encourage interviewees to quantify the business impact of those benefits. Documenting results is the ultimate goal of a case study—while also the most challenging information to get. One of the most effective techniques involves asking "before-and-after" questions.

The following are sample questions to help you craft your own interview questions to elicit measurable results.

Time Savings

> Q: *At what points are you saving time? How long did the specific event or process take before as compared to now? Across how many people?*

> Q: *Are you able to do the same amount of work with less staff, or get more done with the same staff? Please explain.*

Interviewing … continued

Productivity

Q: Have you reduced downtime or outages?

Q: How much faster can employees find the information they need to do their jobs?

Q: How much more quickly were you able to get a problem solved or solution in place compared to other options?

Sales / Marketing

Q: Are sales reps able to make more calls or visits in a day?

Q: In what ways does this enhance your competitive advantage?

Q: How has it allowed you to create and support new revenue streams?

Operational Efficiency

Q: By how much has the solution expedited time-to-market?

Q: How much does the solution reduce training time for new employees?

Q: How has it increased employee satisfaction?

Q: How has employee turnover improved?

Interviewing … continued

Customer Service

Q: How has the solution enabled you to change the customer experience?

Q: Has it reduced the time to resolve customer issues? By how much?

Q: Has the solution helped improve customer survey results? By how much and in what areas?

Q: How did it lower customer turnover or increase customer retention?

Compliance

Q: How does the solution enable you to comply with regulatory requirements?

Q: Have you experienced fewer fines or lower costs related to consultants employed to assist with compliance?

Financial Impact

Q: What hard costs were eliminated by bringing in this solution?

Q: Have time-savings allowed you to save on labor costs, either by reallocating staff or eliminating the need to hire? By how many full-time employees (FTEs)?

Interviewing … continued

Q: Has the solution allowed you to eliminate or delay the need for purchases? What is the estimated cost-savings of that?

Q: How does it allow you to capture more revenue?

Q: How does it enable you to shorten your accounts payable times or improve cash flow?

Q: At what point did the solution pay for itself, and at this point, what is the estimated return on your initial investment?

Wrap-Up Questions

The following questions will help draw out any additional details missed in the interview:

Q: Ultimately, how does our product/service allow you to … (insert the customer's original goals stated at the start of the interview)?

Q: How do you plan to expand your use of the solution in the future, and what additional results do you expect?

Q: Is there anything else that we haven't talked about that you would like to add?

Interviewing … continued

Interview Logistics

If you are local to your customer, consider conducting interviews in person with the relevant contacts. If not, a phone interview can be just as effective.

Case study interviews typically last from 30 minutes to one hour. Do your best to keep interviews to an hour or less. When scheduling an interview, let the customer know approximately how long it will take. At the start of each interview, confirm how much time the contact has. Watch the clock to ensure you do not go beyond the agreed-upon timeframe.

You may want to record interviews to ensure accuracy of customer quotes. For phone interviews, you can either record through the conference service or with a digital recorder connected to the phone. Always ask customers at the start of the interview whether they mind if you record the call for background purposes.

Offer to send the interview questions to the customer ahead of time, even if they do not ask. This helps the customer prepare, which often results in a stronger interview.

CREATING COMPELLING CASE STUDIES

With your interview(s) complete, it's time to write the case study. You may choose to write it internally or hire a contract writer. Either way, it's best to choose someone with strong writing skills and some knowledge of the subject matter.

Select a Contract Writer

Here are a few considerations when choosing a freelance writer:

- Writers should have related experience, if not experience in the exact subject matter. Ensure they are comfortable writing about technology or at least understand it well enough to write about the benefits of technology.
- Make sure writers spend time learning about the featured solutions and what differentiates you as a company. Make sure they have a firm grasp of those solutions before interviewing or writing.
- If writers will conduct interviews and interface with customers, ensure they will represent your company professionally.
- During the process, be available to answer any questions the writer may have.

Creating Compelling Case Studies … continued

Case Study Structure

When structuring your case studies, refer to the Microsoft Case Reference Builder Tool (http://microsoft.mrmpslc.com/ISVCommunity/BenefitDetail.aspx?id=313) for guidance on formatting. Write your case studies according to the following format:

- The Challenge (Approximately 2-3 paragraphs, or 200-250 words)
- The Solution (Approximately 3-4 paragraphs, or 150-200 words)
- The Benefits (Approximately 3-4 paragraphs, or 250 words)

The Challenge

The Challenge section introduces the featured customer and the customer's needs in regard to the products and services. Rather than providing a lengthy, detailed description of the customer, begin by briefly introducing the customer, then get right into the particular challenge faced by the company.

Here is an example of an opening paragraph:

The people of Fabrikam Inc. knew how to work together to make kams. The company's success—it's ranked as one of the top kam makers by a leading trade publication and its initial public offering was one of the most successful Wall Street issues of the past five years—makes that clear. But success has a way of creating new challenges.

Spend the next two or three paragraphs going into more detail about why the customer required a better solution. Describe some of the "pains" or problems associated with the customer's previous

Creating Compelling Case Studies ... continued

arrangement and the business impact, while being careful not to paint the customer in an unfavorable light.

Keep in mind that a strong quote from the customer regarding the challenges faced is the perfect way to emphasize the customer's needs.

The Solution

Briefly describe the customer's reasons for choosing the solutions. This is another point where a quote from your customer about why your company's solutions were the best option would be a powerful persuasion tool. Next, provide a brief description of the featured products.

Then highlight how your company assisted the customer to implement the solution—be sure to include any staff training or after-purchase support that your company provided. In an additional paragraph, succinctly explain how the customer uses the solution in its environment today.

The Benefits

Identify two to three key benefits that the customer currently experiences with the solutions. Put them in order of importance. Emphasize benefits and results as opposed to features. If possible, include measurable results to indicate the level of impact on the business. Again, include quotes if the customer provided strong, relevant commentary.

Creating Compelling Case Studies ... continued

Example:

QuickCollab helped the company to trim product development costs by 35%, saving $2.3 million. "We saw savings in every area of product development thanks to QuickCollab," says the vice president of marketing. "With this one product launch, our return on investment for QuickCollab was 575%, making it one of the most successful technology investments in our history."

Make sure that the benefits you highlight tie back to the challenges described at the beginning of the story. That brings readers full circle in understanding how the solutions resolved the customer's needs.

The Headline

Create an engaging headline that emphasizes the top benefit that the customer experienced:

Fabrikam Speeds Time to Market 50% With Global Collaborative Solution

Include the customer's name. You don't necessarily need to include the name of the featured solution(s). In the example above, the headline keeps the focus on the customer's results by generically referring to the type of solution, rather than a specific product name.

The Sidebar

The sidebar content summarizes the story for readers. It offers basic details about the customer's size, location and industry. Then it lists the software and hardware in use.

Creating Compelling Case Studies ... continued

Customer Quotes

Customer quotes are powerful parts of case studies, adding credibility and interest to the story. Use quotes to enhance a point you're trying to make, being careful not to use them too often. Typically, quotes are one to four sentences and should match the following format:

"Even as recently as five years ago, we could house all of our marketing and manufacturing teams in a single facility, so it was easy to hold meetings and make decisions that moved new kams to market," says Ellen Adams, vice president of marketing, Fabrikam Inc. "But as we opened offices around the world to be closer to our customers, we grew farther apart from each other. Because of the time differences, we tried to conduct business by email, but that was a disaster as we were sending massive files around, waiting for feedback, pinging people and starting the cycle over again."

Choose one or two quotes to highlight at the beginning and end of the story. Refer to the Microsoft Case Reference Builder Tool (http://microsoft.mrmpslc.com/ISVCommunity/BenefitDetail.aspx?id=313) for examples of how to display featured quotes in your case study.

Description of Your Firm

In the sidebar on the back, include a brief description of your firm, your contact information and logo. The summary of your firm should highlight the types of customers you serve and the types of solutions you provide.

CUSTOMER SIGNOFF

When you have completed the case study, circulate it for review in your organization before sending it to the customer for approval. Establish a regular team of one or two people who read every case study that's produced to ensure the content includes consistent, relevant messages and meets your company's objectives. Give reviewers a specific deadline to complete their review and feedback. Before sending the story to customers, have it proofed carefully for typos or problems with text flow.

Email the clean draft of the story to customer contacts. It's advisable to send the story as an editable document, rather than a PDF, so customers can easily input their edits and comments in the document. Also, send the legal release form that customers will sign to indicate their approval. Let customers know that you will be checking back with them on a specific date regarding the case study.

When featuring satisfied customers, it's important to ensure they are pleased with how they are presented. To that end, incorporate their requested edits. Stay persistent yet patient as you work with customers to secure final approval.

When your story is completed and approved, formally thank the customer contacts for their willingness to be featured. Rather than email, call the customer or send a handwritten thank you note.

DESIGN

With an approved case study in hand, lay it out in the Microsoft case study template. Have it proofed one more time for errors or typos that may have crept in during the layout process. Finally, send your customer a final copy for their records as well.

Now you have a professional-looking, compelling case study to support your sales, marketing and PR efforts.

HOW TO USE YOUR CASE STUDY TO GENERATE LEADS

A case study can be one of the most powerful lead-generation tools available. Business buyers need information to do their jobs, and when their suppliers—or potential suppliers—provide that information in an accessible, user-friendly format, buyers respond with enthusiasm. So your case study can become an important response driver in your lead-generation programs.

The process of lead generation is fairly straightforward. It involves a series of steps, starting with outbound and inbound communications, the goal of which is to generate the inquiry and qualify it for the sales force. The lead is then handed off to sales and tracked by monitoring conversion to sales revenue.

The secret to success is to focus on a clear set of business rules and processes. Lead generation and management is the less creative (and less glamorous) side of marketing, with an emphasis on developing rules, refining them, testing them and tracking them in order to continually make improvements. The company with the best process, executed consistently, is the one with the true competitive advantage.

CAMPAIGN PROCESS STEPS

Now that you're convinced that "the company with the best process wins," let's look at the steps involved in the lead-generation campaign process:

1. Set campaign objectives
2. Analyze and select campaign targets
3. Select campaign media
4. Develop message platform
5. Develop campaign offer
6. Create communications
7. Plan fulfillment materials

Campaign Process Steps ... continued

CAMPAIGN PROCESS STEP	CONSIDERATIONS
Set objectives	Most lead generation campaigns select from the following objectives: • The number of leads expected • Their degree of qualification • The timeframe during which they will arrive • The cost per lead • Lead-to-sales conversion ratio • Revenue per lead • Campaign ROI or expense-to-revenue ratio Choose one primary and no more than two secondary objectives, and make them very specific.
Analyze and select campaign targets	The tighter your targeting, the higher your response is likely to be. Current customers, of course, respond better than cold prospects.

Campaign Process Steps … continued

CAMPAIGN PROCESS STEP	CONSIDERATIONS
Select campaign media	For generating leads among new prospects, the best choices for ongoing campaigns are print and banner advertising, search engine marketing (SEM) and direct mail. Trade shows and referral marketing programs can be effective as well. Among inquirers and current customers, you may find telephone and email most productive, telephone being more intrusive and email being less expensive than direct mail or print.
Develop message platform	The platform is the key benefit that will appeal to the target audience. Your response will improve if you keep the message simple and focus on a single benefit.

Campaign Process Steps … continued

CAMPAIGN PROCESS STEP	CONSIDERATIONS
Develop campaign offer	This one is simple: Your case study is the offer. However, there are other variables to consider: • Will you deliver the case study to any responder or only those who qualify in some way? • How much information must respondents provide to get the case study? • Will you deliver the case study in electronic or print format? • If electronic, will it be downloaded or delivered via email?
Create communications	The copy is the most important element of your communication, so use a professional direct-response copywriter with business to business (B2B) experience.
Plan fulfillment materials	Speed is of the essence. Studies show that the faster the fulfillment materials are received, the more likely the lead is to be qualified. The need is still fresh and competitors are less likely to be in the running. As a rule of thumb, inquiries should be fulfilled no later than 24 hours after receipt.

CAMPAIGN MEDIA

To deliver your case study offer, you can choose among a wide variety of media options. The choices may be overwhelming, so you should begin with the tried-and-true media that have proven to be the top performers:

- Your Web site, with an offer
- Direct mail
- Search engine marketing (SEM)

Your Web Site

Your Web site can serve as your most efficient lead-generation medium. Convert your site from a passive online brochure to an interactive response-generating tool by offering a case study in exchange for online registration.

Here are some tips for making your registration as effective as possible:

- Place the registration offer in a prominent position on your home page, such as the upper right-hand corner.
- Keep the required number of data points to a minimum. For example: Contact name, company name, mailing address and email address.
- Repeat the offer on any internal page where customers may land due to keyword searching.

Campaign Media ... continued

Direct Mail

With 18,500 business response lists available for rent, plus comprehensive compiled files, prospective business buyers can be tapped through the mail, even for obscure products or very targeted niches.

One reason for direct mail's staying power is its flexibility. Direct mail can be short or long, colorful or plain, and include many or few components. Consider some of the most productive direct mail formats in use today:

- **Flat mail.** Flat mail is a tried-and-true option for lead generation. Standard #10 business size envelopes as well as 6 x 9 or larger envelopes are well-suited for the standard elements of a consumer direct mail package: outer envelope, letter, brochure, reply form, business reply envelope.
- **Self-mailers.** Self-mailers are widely used to promote seminars and trade shows. The main advantage of self-mailers is cost, plus the likelihood of their being passed along from in-box to in-box within an office. There is still considerable debate about which is better for lead-generation campaigns, a self-mailer or a flat-mail package, so you may have to test both to see which is more effective for your business.

Campaign Media … continued

- **Postcards.** Postcards appeal to marketers because of their low cost and to recipients because they can be skimmed and absorbed quickly. The typical format is an oversized postcard that can be used to announce a new product feature or an upcoming seminar—a communication that serves the need to stay in touch with a prospect but does not require much detailed explanation or content.
- **Dimensional mail.** These are outsized, cleverly designed and typically very expensive pieces that are intended to stand out in the clutter of an administrative person's in-box in order to get noticed and passed on to the decision maker. They often contain a physical premium—a video, a gift or some item that an assistant will think the boss will want to see.

Search Engine Marketing (SEM)

Investing in the keywords your prospects are likely to search on has become an important tool in lead generation. Use your case study as the bait to encourage searchers to click on your ad and find out more about your product or service.

Some tips for success with SEM for lead generation:

- Start at the top. Go with major search engines such as Google and Yahoo first, and then test the second tier of search engines, such as MSN.

Campaign Media … continued

- Be sure to tap the vertical search engines in your industry category, for example, GlobalSpec for engineers and ThomasNet for industrial buyers.
- SEM has become highly competitive, so it's wise to use an experienced professional to assist you in building your keyword list, setting cost-per-click fees and testing.
- Test the wording you use to promote the case study offer. Measure the results of the case study offer against other offers that have been successful for you in other media.

Outbound Campaign Media Types

Medium	Strengths	Weaknesses	Best Applications
Mail	Many formats available Can adjust to support the need	Cost per piece Long planning cycle	Inquiry generation Response handling Lead nurturing Retention
Telephone	Deep penetration Universally available	Recipient is often unreachable Expensive	Inquiry generation Response handling Lead qualification Lead nurturing
Email	Fast turnaround and results Inexpensive	Permission required Limited address availability	Lead qualification Lead nurturing

Campaign Media ... continued

Medium	Strengths	Weaknesses	Best Applications
Search engine marketing (SEM)	Pay-per-click means limited risk Highly targeted	Keyword prices on the rise	Inquiry generation
Print advertising	Broad reach Efficient/M	Less targeted	Inquiry generation Brand awareness
Banner advertising	Fast turnaround and results Deals available	Limited workable outlets Small creative space	Inquiry generation Brand awareness
Catalogs	Inexpensive compared to field sales Valued by customers as a reference	Expensive compared to e-commerce Prone to obsolescence	Retention Sales
Trade shows	Qualified reach	Limited reach Expensive/M	Inquiry generation Brand awareness
Seminars	Conveys deep product information Develops personal relationships	Inefficient/M Limited reach	Lead nurturing Retention

Campaign Media ... continued

Medium	Strengths	Weaknesses	Best Applications
Webinars	Broad reach Inexpensive/M	Imperfect technology	Lead nurturing Retention
Newsletters (print)	Inexpensive/M High perceived value	Difficult to sustain editorial quality	Lead nurturing Retention
Newsletters (email)	Inexpensive/M High pass-along propensity	Difficult to sustain editorial quality	Inquiry generation Retention
Web site	Easy to update Multipurpose applicability Holds deep product information	Can be too passive Non-intrusive	Brand awareness Inquiry generation Response handling Retention

THE MESSAGE PLATFORM

Message platforms encapsulate the key benefit that you think will appeal most strongly to your prospective audience. Your job is to convert the product or service features into benefits and then select the benefits that are most meaningful to your prospects.

Here is a checklist of typical message platforms used successfully in appealing to business buyers. Note that the catch phrases can appeal to business goals or personal incentives (or both).

- **Save time.** This message can also be presented as: get to market quicker or reduce manufacturing overhead.
- **Save money.** This can also be thought of as spend less.
- **Grow your business.** Penetrate new markets, find new customers and sell more.
- **Job security.** As in the old adage: “No one ever got fired for buying IBM.”
- **Increase company efficiency and productivity.** Find ways to do more with less.
- **Make money.** Increase sales, increase profits.
- **Avoid stress or hardship.**
- **Minimize risk.** Eliminate your fear of the unknown and concerns about failure.
- **Make your job easier.** Get the help you need to improve efficiency and performance in your day-to-day tasks.

TEST YOUR CASE STUDY'S EFFECTIVENESS

The true secret to direct marketing success is continuous testing and improvement. Testing helps you identify the strongest lists, the most powerful offers and the most compelling copy and design treatments for your lead generation program. It also lets you find out what works in the marketplace, based on a minimal marketing investment.

To determine whether your new case study is the best offer for your lead generation program, set up a test. The test will pit your new offer (the case study) against previous offers that have worked. If you have not done testing previously, and you don't know which offer works best, set up a fresh test using your case study and what you think has been your most successful offer to motivate consumer response in the past.

Then, you need to determine the size of the test. Your objective is to ensure that the test provides "statistical significance," meaning that the results from the test sample will be replicated when you roll out to the rest of the audience.

Test Your Case Study's Effectiveness … continued

Calculating the sample size needed for a reliable test is simple thanks to the many "sample size calculators" available online. The calculator will ask you for three things:

1. The response rate you expect. You can estimate this from past experience or by using the rate you would need to break even on the campaign.
2. The margin of error you can afford. The more error you can accept, the smaller the test size you can get away with. Most direct marketers use 10%-20% for this number. Here's how the math works: If you expect a 2% response, and you won't be in too much trouble if the result comes out to be 1.6% (i.e., 20% less than 2%), then 20% is the margin of error you can afford. Of course, there's an equal chance that the result will be 20% better than your estimate, which would be a nice thing!
3. Your required degree of confidence. Direct marketers usually work at 90%-95% confidence in testing.

Be sure to isolate the variable, so you can identify what drove the result. For example, when you test two offers against each other, make sure you present each offer separately to similar audiences, using the same medium and creative format. This way, neither the target audience nor the creative treatment becomes a test variable

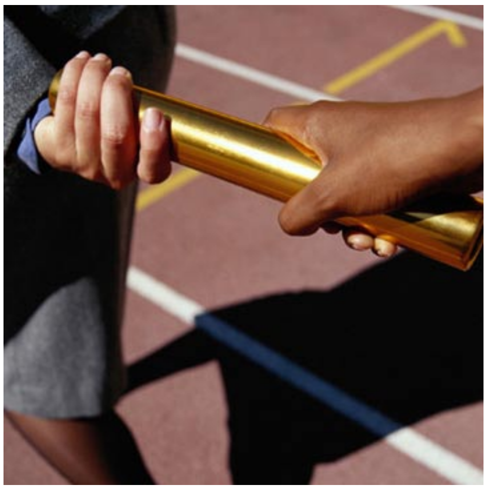
Test Your Case Study's Effectiveness … continued

that can muddy your results. The best way to make this happen is to select a random sample of the target audience, divide the sample in half and communicate the separate offers to each group.

The benefits of testing are huge for direct marketers. You may be very surprised to discover that your market responds differently than you expect. Once you have real market feedback, you can refine your lead generation programs and very quickly improve your response, lower costs and generate more business.

RESPONSE MANAGEMENT

Planning for response management is a critical, and often sorely



neglected, part of preparing a lead generation campaign. Ensuring that your prospects' responses are properly handled and tracked is an invaluable part of the process. In fact, some would argue that without proper response management you are throwing your marketing dollars out the window.

Keep in mind the following points:

- The best way to track and measure the results of each lead generation message is with a key code on the outbound communication. Codes can take the form of a "priority code" number in the letter or on the response device. They can be a special "extension" after an 800 number. Or, they can take the form of a special URL or URL extension address.
- Internal processes must be set up in advance to capture and record these codes for later analysis. Make sure the teams handling the responses—whether they are internal call centers or outsourced fulfillment companies—are well trained and motivated to capture as many codes as possible.

Response Management ... continued

- Despite your best efforts, a certain amount of inbound responses will inevitably go uncaptured. The best way to handle them for analysis is to separate the uncoded responses and analyze the trackable responses on their own.
- Offer as many response media channels as possible on your messages. Unless you are truly limited by budgetary or staffing constraints, make every possibility available for your prospects' convenience—phone, Web, business reply card, fax, email.
- Personalize your reply forms where possible to ensure accuracy, improve key code capture and make it easier for the prospect to complete the form.

LEAD QUALIFICATION AND NURTURING

Nothing is more important than correctly qualifying sales leads before they are delivered to your sales force. Marketers frequently misunderstand and think that lead volume is their objective. In fact, it is quality not quantity that counts. The objective is to generate enough qualified leads so that each sales territory is optimally busy, productive and fulfilling its quota. More is not necessarily better. Delivering too many leads can be as wasteful as delivering too few. Qualified leads provide real leverage to one of your most valuable resources: the sales force.

Set Qualification Criteria

The most important approach to setting qualification criteria is to know the needs of your sales force; they are the final frontier in closing the deal. They know better than anyone the nature of the sales process and what kind of buying characteristics are most workable.

Qualification criteria will vary by company and by industry. However, as a general rule, most criteria involve the following categories:

- **Budget.** Is this a budgeted purchase? If so, what is the size of the available budget? You will want to set up categories or price ranges in order to prioritize prospective purchases according to need and/or cost. You may also want to request information about the company's credit history at this point.

Lead Qualification and Nuturing … continued

- **Authority.** Does the respondent have the authority to make the final purchase decision? If not, do your best to capture additional relevant contact information.
- **Need.** How important is the product or solution to the company? Are they suffering with their current solution? You want to approach this topic tactfully by asking questions such as “What is the problem to be solved?” “What alternative solutions are you considering?” “How many do you need?” “What product do you currently use, and does it meet your needs?”
- **Timeframe.** What is their readiness to buy? When is the purchase likely to take place? Depending on industry and sales cycle length, this can be broken into days, months or even years. When establishing a timeframe, be sure to ask at what point they would like to see a sales person.

Lead Nurturing

A partially qualified inquiry is not ready to be presented to the sales team. It needs to be nurtured in a process sometimes called “incubation” or “lead development.” Nurturing involves a series of communications intended to build trust and familiarity and keep a relationship alive until the prospect is ready to buy.

The nurturing process can be fast or slow—or seemingly endless. Sometimes a prospect never gets the intended budget for the

Lead Qualification and Nuturing … continued

purchase, or the company's needs change or they decide to buy from a competitor. This can be discouraging. Remember that approximately 50% of all business inquiries eventually result in a sale. That means for every lead that goes nowhere, there is one that will become a purchase. This is reason enough to spend the energy creating an effective nurturing process.

Leads that require nurturing include:

- **Partially qualified inquiries.** They are not ready to deliver to sales, according to the pre-defined qualification criteria.
- **Leads returned by the sales team.** Frequently, a presumably qualified lead turns out to require further nurturing. The contact may have changed jobs, or the business need may have changed. In these instances, sales will return the lead to marketing for further follow-up.

Nurturing can be done via various types of media—telephone, direct mail and email being the most popular. The following are some typical nurturing tactics:

- Catalog mailing
- Seminar invitation
- Trade show invitation
- New product announcement
- Newsletter (email or print)

Lead Qualification and Nuturing … continued

- Press release
- Survey
- Video or CD mailing
- White paper, downloaded or mailed
- Article or chapter reprints
- Case study
- Personal communication, like a birthday card or holiday card
- Letter from various sides of the company, such as the CFO, customer service department, engineering or senior executives

The objective of the nurturing program is to remain in touch with the prospect until the time of purchase. Things change rapidly in businesses. The only way we can know this is through regular communication.

CAMPAIGN MEASUREMENT

Business marketers operating in a multi-channel world are continually challenged by problems in measuring the results of their lead generation campaigns. Without solid measurements, it's hard to demonstrate the value of marketing and justify the budgets. When multiple people and functions are involved at various stages of the lead generation and conversion process, evaluating the contribution of each element can seem impossible.

Seven techniques that allow lead generation campaigns to measure sales results are:

1. **Closed loop.** Many companies have put in place elaborate "closed-loop" processes to accomplish tracking. This approach can be powerful, but it's expensive. A closed-loop system tries to track each qualified lead to its end result: sale, rejection or loss to the competition. In our complex multi-channel lives, this means a lot of hand work: contacting sales staff individually to ask them to report on results. Salespeople are busy and focused on selling, so hounding them can be an exercise in frustration. Closed loop works best on high-value products and services, but because it usually under-reports results, it needs to be supplemented by other techniques.

Lead Qualification and Nuturing … continued

2. **End-user sampling.** Surveying end users who were promoted in a particular campaign can provide excellent results. It is inexpensive and reliable, and it captures actual sales from multiple channels. Select a statistically projectible sample of accounts who received the campaign message. Survey them via phone, email or mail. Using this kind of did-you-buy survey, you'll be able to claim, legitimately, much more campaign revenue to apply to your lead generation ROI calculations. One caveat: don't go crazy and over-survey your customers. There's a fine balance between finding out what you need to know and annoying your customers into dissatisfaction.

3. **Data matchback.** Analyzing the sales into accounts that have been promoted is an approach that has been used for years and particularly suits high-volume campaigns like catalog sales or office supplies. The way this works is to wait a suitable period—around the average length of the sales cycle—and then review the revenue levels in the accounts that were selected for the campaign. This technique is not suited to marketers who rely on distribution channels, unless they can persuade their channels to share revenue data from their end-user accounts. Another problem is that it records all sales into the account, and is thus likely to overstate the sales that result from any particular campaign.

Lead Qualification and Nuturing … continued

4. **Control groups.** This is the ideal solution in a single-channel mail-order environment, but just about impossible to implement in the broader world of business marketing. A control group isolates a set of customers who won't see the campaign and compares sales in these accounts versus a set of similar accounts who have received special promotions. This can work pretty well for long-term, multi-tactic campaigns, like loyalty programs, but for most campaigns that use multiple media, it is very hard to reliably isolate any one customer set.

5. **Exclusive offers.** When you can create an offer that is only promoted in a particular campaign, all the sales can be credibly attributed to the campaign itself. Similarly, coupons redeemable through distribution channels but funded by the marketer allow reliable tracking of campaign results. These techniques are best suited to single tactic campaigns for products with short sales cycles.

6. **Product registration.** This is the ultimate end-user sampling technique. Most registration systems ask the customer to indicate where or when they bought a product, and some ask what influenced their purchase decision. But it is hard to link registration questions back to specific campaigns without an elaborate string of questions, and too many questions will reduce registration rates.

Lead Qualification and Nuturing … continued

7. **Activity-based measurements.** Some marketers throw in the towel and say that their jobs end when the lead is handed off to the sales channel. This allows them to measure just their lead-generation activities—response rate, conversion rate to qualified lead, cost per lead, campaign executed on time, on budget and so forth. When the other techniques are too expensive to justify—and closed loop can be very expensive—settling for activity measures can make sense.

APPENDIX 1

Sample Case Study

Intellon-Enabled SlingLink™ Adapters Connect Award-Winning Slingbox™, Creating Exceptional Out-of-Box Experience

[featured customer quote]

"The customer experience is all about ease of use and performing above expectations. The Intellon-enabled SlingLink adapter delivers that without question. We've achieved best of class return rates by having an outstanding out-of-box experience."

—Rich Buchanan, Vice President of Marketing, Sling Media, Inc.

[sidebar info]

Customer:

Sling Media

Web Site:

www.slingmedia.com

Industry:

Electronics

Intellon Solution:

HomePlug® 1.0

Customer's HomePlug-Enabled Solution:

SlingLink network adapters

Appendix 1 … continued

Business Benefits:

- SlingLink adapters allow consumers to connect the Slingbox to their home network in the amount of time it takes to walk from one room to the other.
- The product has quickly gained popularity among consumers and the media, racking up coveted industry awards.
- The Slingbox and SlingLink adapters have achieved best-of-class return rates at retailers like Best Buy. The Slingbox leads the category for the metric, a feat unheard of for such a new technology.

Business Challenge

With portable electronics like cell phones, laptops and PDAs, we can now communicate and work just about anywhere. But until recently, access to our own TV programming has been confined to the living room.

Sling Media, based in San Mateo, Calif., is changing the way people watch TV. The digital lifestyle products company created the award-winning Slingbox™, a device that allows consumers to access their living room television programming at any time, from any location, using displays such as laptops and desktop PCs, handheld computers and smartphones.

With the Slingbox, users can tap their own TiVo for a night of Lost at a friend's house, cook step-by-step alongside Emeril in the kitchen or watch the World Series from a hotel room halfway around the world.

Appendix 1 … continued

Viewers can see live TV via their home cable box or satellite receiver, or programs recorded on their digital video recorder (DVR).

As Sling Media developed its ground-breaking technology, the method of Internet connectivity was central to creating a smooth, plug and play customer experience. However, some homes lack Ethernet jacks where TVs are located, and with encrypted networks, wireless can be a little more challenging for the average consumer.

"When you're selling to the heart of the consumer electronics channel, a good portion are not tech geniuses," said Rich Buchanan, vice president of marketing at Sling Media. "For our product to succeed, we have to maximize the out-of-box experience for customers."

The Intellon HomePlug-Enabled Solution

Powerline communications (PLC) technology, which relies on existing home electrical wiring for connectivity, emerged as the perfect solution. Using powerline, every electrical outlet in a home becomes a potential Ethernet jack or Internet connection point. Additionally, the technology delivers Internet-class connection speeds, exceptional reliability and simple installation for the customer.

"Everyone has an electrical outlet behind their TV, so it was an easy choice to select powerline as the primary alternative to wireless," Buchanan said. "It's the ideal solution because it literally just plugs into a wall jack."

Appendix 1 … continued

Sling Media selected Intellon's global standard HomePlug ICs to enable its new SlingLink network adapter product line, which provides the connection between the Slingbox and the broadband gateway or home router. As the global leader in HomePlug IC sales and product enablement, Intellon was able to help Sling Media bring its SlingLink adapters to market quickly.

By developing its own adapters, Sling Media created an optimized solution to power the Slingbox's streaming media. At the same time, the Sling Media-branded adapters enhance consumer confidence.

"If a customer at the store picks up the Slingbox and sees the SlingLink adapters next to it—an optimized solution that's tested and works—then they have a much higher level of confidence," Buchanan said.

SlingLink adapters allow consumers to connect the Slingbox to their home network quickly and easily in the amount of time it takes to walk from one room to the other. Users place the Slingbox in their entertainment centers and connect it to the video source. Then they establish an Internet connection to their Slingbox with two simple steps by connecting one SlingLink adapter into the wall near their router and the other into an outlet near their Slingbox.

Customers load SlingPlayer™ software onto their computers as the final step to allow them to control their TVs from anywhere. The software lets customers remotely change channels, set their DVRs to

Appendix 1 … continued

record specific programs, adjust picture and quality, and create shortcuts to their favorite channels.

Business Benefits

Launched in July 2005, the Slingbox is now available in 3,000 retail locations, as well as from leading online electronics retailers. The product has quickly gained popularity among consumers as well as with the media, racking up coveted industry awards—*Business Week's* Best Products of 2005; *Time* magazine's Best Inventions of 2005; *Popular Science's* Best of What's New 2005; and *Popular Mechanics'* Breakthrough Awards 2005.

According to Buchanan, ease of use has been key to the product's success, and Intellon's HomePlug-enabled solution serves as an essential foundation for the Slingbox's simple setup and smooth customer experience. In fact, customers choose to connect with the SlingLink adapters over wireless at a ratio of six to one.

As further evidence of the simplicity of the Slingbox and SlingLink adapters, the products have achieved best-of-class return rates at retailers like Best Buy. In fact, the Slingbox leads the category for the metric, a feat unheard of for such a new technology.

"The customer experience is all about ease of use and performing above expectations," Buchanan said. "The Intellon-enabled SlingLink adapter delivers that without question. We've achieved best of class return rates by having an outstanding out-of-box experience."

Appendix 1 … continued

As Sling Media looks to develop a family of consumer electronics products for today's digital way of life, the company plans to further leverage HomePlug technology.

"We're absolutely thrilled with the technology," Buchanan added. "It's easy to use and deploy, and drives high levels of customer satisfaction. We will be using HomePlug technology in a number of products in the future."

About Intellon Corporation

Intellon is the world leader in powerline communications, providing HomePlug® compliant and other powerline integrated circuits for home networking, networked entertainment, BPL access and commercial applications. Intellon created and patented the baseline technology for HomePlug 1.0 and is a major contributor to the baseline technology for the new 200-Mbps HomePlug AV powerline standard. With over 3 million HomePlug ICs sold, Intellon holds the dominant market share of the rapidly growing HomePlug market. The company was founded in 1989 and is headquartered in Ocala, Fla., with offices in San Jose and Toronto. For additional information, visit www.intellon.com.

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APPENDIX 2

Resources

Books

Art and Craft of Case Writing by William Naumes

The Case Study Handbook: How to Read, Discuss, and Write Persuasively About Cases by William Ellet

Articles

How to Write a Case Study:
(www.gttp.org/docs/HowToWriteAGoodCase.pdf)

How to Get the Most Bang from your Case Study Buck: 22 Tips:
(www.thatwhitepaperguy.com/article_case_studies.html)

How to Write an Effective Case Study:
(www.sitepoint.com/blogs/2005/02/25/how-to-write-an-effective-case-study)

Write Case Studies That Sell:
(http://guerrillaconsulting.typepad.com/guerrilla_marketing_for_c/2005/05/tip_5_writing_a.html)

Appendix 2 … continued

How to Write a Case Study:

(www.hoffmanmarcom.com/casestudy/howtowrite.php)

How to Write a Powerful Case Study:

(http://bigmarketing.wordpress.com/2007/03/09/how-to-write-a-powerful-case-study/)

How to Write a Great Case Study:

(http://thinkcreation.net/blog/?p=180)

ABOUT THE AUTHORS

Casey Hibbard of Compelling Cases specializes in developing customer case studies and managing the complete process with

customers. With a decade of case study experience, she has written more than 400 case studies for organizations of all types and sizes, from software companies to B2B consultants to nonprofits. She is the author of the blog Stories That Sell and of the first published book on the topic of customer case studies, due out in mid-2008, *Stories That Sell: Turn Satisfied Customers into Your Most Powerful Sales & Marketing Asset.*

Ruth P. Stevens is author of *Trade Shows and Event Marketing: Plan, Promote and Profit*, published in 2004, and *The DMA B-to-B Lead Generation Handbook*, with a second edition published in 2005. Stevens consults on customer acquisition and retention, for both consumer and B2B clients. She has held senior marketing positions at Time Warner, Ziff Davis and IBM, as well as two Internet start-ups. Stevens teaches graduate students at Columbia Business School and is the past chair of the Business-to-Business Council of SMA. Crain's *BtoB* magazine named Stevens one of the 100 Most Influential People in Business Marketing in 2002. Stevens serves as a director of Edmund Optics, Inc., and is president of the Direct Marketing Club of New York. She studied marketing management at Harvard Business School and holds an MBA from Columbia University.

ABOUT MARKETINGPROFS

Founded in January 2001, MarketingProfs is a publishing company that specializes in providing both strategic and tactical marketing know-how for marketing and business professionals in organizations worldwide through a full range of online media.

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