**PDP Case Study Guidelines**

**1. Determine the case study’s objective.**

Your first step when writing a case study is to determine the objective or goal of the subject you’re featuring. In other words, what will the client have succeeded in doing by the end of the piece? The client objective you focus on will depend on what you want to prove to your future customers as a result of publishing this case study.

**2. Contact your candidate for the Case Study.**

*Ask for permission to write about them in a Release Form. Provide the following:*

* A clear explanation of why you are creating this case study and how it will be used.
* A statement defining the information and potentially trademarked information you expect to include about the company -- things like names, logos, job titles, and pictures.
* An explanation of what you expect from the participant, beyond the completion of the case study. For example, is this customer willing to act as a reference or share feedback, and do you have permission to pass contact information along for these purposes?

*Additionally, indicate the benefits to Offer Your Case Study Candidate:*

* Brand Exposure
* Employee Exposure
* Backlinks & Website Traffic

*Finally, give them an overview of the process:*

* Their acceptance
* Questionnaire (see below)
* Interview
* Draft Review
* Final Approval

**3. Develop the questionnaire.** Use several, but not all the following in a questionnaire to get them thinking and for you to review prior to the interview—

*Their experience before using your product or service:*

* What were you using before this product/service?
* Summarize three points of frustration you faced.
* What was the big ah-ha moment when you decided you needed to try something new?
* What were the top reasons you selected this product/service?

*Their experience using your product or service:*

* How easy or hard was it to get started with this product/service?
* How has it helped you to overcome the challenges you had before?
* How is it different than other alternatives you’ve tried?
* What is your favorite feature? Why?
* Tell me about the most positive experience you’ve had using this product/service. (Probe  
  for specifications.)

*Their results with your product or service:*

* How has this product/service helped you achieve your business or personal goals?
* What specific metrics can you share about the impact it has had? Ask for percentage changes if they are hesitant to give you raw data. (You may need to follow up to get these.)
* Why they would recommend your product or service.
* What is the single biggest reason you would recommend our offering?

**4. Write a Case Study.**

* The following is a [good format](https://pdp.box.com/v/Case-study-format) you should use.
* If you think that an infographic might be useful, please let PDP know. We will want to produce this infographic, so we can keep the branding similar between representatives. Here is a [good example](https://pin.it/y3p4hwznjbjsse) to get you thinking.

**5. Obtain final approval case study.**

Use the following [Consent to Publish Form](https://pdp.box.com/s/j7mfstdzdfrva4t73gb8b5e4a2ro1ewg) to obtain final approval.