



*Lexia*

Creating Casestudies:  
What You Need To Know



## Creating Casestudies

Whether you have marketing responsibility for a business, a school, a charity or a sports club, casestudies can be really powerful.

As an agency, we always encourage clients to understand the impact of personal stories, and identify how these can better serve the reputation of your brand.

Here's all you need to know....

✉ [deborah@lexiaagency.co.uk](mailto:deborah@lexiaagency.co.uk)

☎ 07974 359001

🌐 [www.lexiaagency.co.uk](http://www.lexiaagency.co.uk)



## What's the Point of Casestudies?

As a tool in helping your clients, customers, funders, and media targets understand what impact your day-to-day work has, casestudies are the perfect solution.

They tell the 'human story' behind your brand and give a genuine indication of what it's like to work with you or commission your service.

Without casestudies, there's a danger that you're only ever 'preaching' about the wonderful brand you are, or the great way you do your work.

What your potential customer wants to know, or your funder or community, is '...ah yes, but can you show me how?'



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## Are they Useful for all Types of Businesses and Organisations?

**Absolutely. Here's a few examples to prove the point:**

- That charity which provides friendship for lonely people. Sure, it can write down lots of facts and stats about how many people in Midsomers it has chatted to during Covid, but the real story, lies in sharing the tale of how Doris, 75, didn't used to see a single soul for weeks at a time, until your charity started delivering her shopping and having a socially distanced garden through the front window every Monday afternoon. That's the impact!
- You're a logistics business which transports thousands of tonnes up and down the motorways every year. So what? The story is in being able to share how you've helped that medical supplies firm get its products to 92 hospitals in the last 18 days.
- You're a university which is supplying free parcels to locked down students and is delivering daily Zoom-based wellbeing support. Great, but let's see 19 year old Katie explaining what a difference it's making to her experience of living in lockdown.

Whether your business or organisation is in the private or public sector, and whether it's consumer focused or a tech service provider, stories of who you work with and how you work, will always gain you more

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## But Surely They're a Hassle to Create?

They don't need to be.

It's worth building into your customer journey, a process whereby your team know that you're always looking for casestudy-worthy material.

It can help to conduct a workshop – usually led by a comms specialist – about what's needed for a good casestudy, and why they work so well.

Casestudies BECOME hassle, when everyone is scrabbling around trying to find out anecdotal historic stories for a member of the media or a grant funder.

It's far better to create an ongoing bank of options, which are always available for the purpose of storytelling.



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## What Do I Need to Consider When it Comes to Writing up a Casestudy?

Perhaps the first rules to remember, are those that journalists tend to adopt when they're looking at every story scope.

**You'll be taking into account:**

**Who:** What's their name, and if important, what's their role

**What:** What service or product did they engage with and what do you do for them

**Where:** Where do they live, or where is this casestudy relevant to geographically

**Why:** Why do they think your service is so good, and why do they stand out for you as a good example of your exceptional business

**When:** if relevant, when were you working with them or for them (was it amid the pandemic, at a time of crisis, when they were particularly unwell, or when another supplier had let them down?)

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## And are Images Important?

Yes indeed, and given we've all got cameras on our phones these days, there's even less reason to miss out on getting a great still or video clip.

They say every picture tells a story, and it's true when forming a casestudy.

People are drawn to images, and it gives you more scope for use in the press and on social media.

Make the picture relevant to the detail of the story, and always consider the merits of getting a good professional to take the shot for you.



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## Where Will I Use The Casestudy?

Your options are many and varied.

You might want to use the casestudy internally, in staff newsletters and the like.

What about a page of casestudies on your website?

And how about featuring it on your social media feeds?

Then of course, there's the opportunity to share that story with the press, and let them really get a sense of how well you deliver your business – but told through the eyes of your recipient customer.

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## Top Takeaways

- Make casestudy development part of your customer journey. Let people know you like to capture stories and ensure you have permission.
- Ensure your team know to be 'on the look' for casestudies in the course of their daily work.
- Always include the important factors, such as Who What Where Why When.
- Include quotes directly from that person.
- Plan for, and use, great photography.
- Know where you intend to use your casestudy and whether it needs to be tailored for those particular mediums.
- Keep track and continually build a library of casestudies so you always have something up to date.
- Consider a training workshop which helps some or all of your team understand more about the purpose of casestudies, and embeds it into your culture.



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For Casestudy Workshops, Contact Us.  
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