

Case Study Template

Why they chose the platform — and, separately, why they chose you.

SELLER-ONLY — HOW TO USE THIS

Purpose	<i>[the doubt this removes]</i>
Deal stage	<i>[early credibility vs. late-stage risk reduction]</i>
Buyer type it lands with	<i>[technical proof / economic ROI / champion ammo]</i>
Talk track cue	<i>"[how to introduce it without just reading it aloud]"</i>
Objection it addresses	<i>[the specific doubt this defuses]</i>
Pairs with	<i>[related data sheet / deck]</i>

Customer-Facing Content

Title — a result, not a label

"How [Company] [achieved result]" beats "[Company] Case Study." A concrete promise a skimming reader can repeat back. Unlike the other two templates, a case study is always company-specific — the customer name is the title, not a personalization add-on.

Customer & situation

Who, industry, size — only what's cleared for external use.

The champion

A real person on the customer side who owned the decision, if cleared to name — humanizes the story and mirrors the prospect evaluating you right now.

The challenge

The business problem, in the customer's own words if possible. Specific, not generic — "losing 15 hours/week to manual reporting," not "inefficient processes."

Why they chose [Partner]

What made the platform the right call — the product-level "why us."

Why they chose [Your Company]

What tipped the decision toward [Your Company] as the implementer specifically — the delivery-level "why us," and the section most case studies skip entirely.

The solution

What [Your Company] + [Partner] built/delivered.

[Partner]'s role specifically

What the platform contributed — precise enough that a partner's own team would sign off on it.

The result

Verified, quantified — never "happier team" alone. Framed in terms a C-suite reader recognizes: revenue, cost, risk, or time-to-value.

Quote

Customer or internal, if available — in their words, not polished into marketing voice.

CAPTURE-AS-YOU-GO

Every time a rep says "this helped me close X," log what was said, the deal size/stage/outcome, which asset was cited, and the date.