



Case Study Process for Featured Customer

Once your case study candidate has agreed to participate, they may ask for details about how the process works. Send a one-page description of the process, from end-to-end which also includes how the story will be used. Make sure to include key benefits for your customer. Keep it brief. Customize as needed.

Dear [CLIENT NAME]

Thank you for your interest in [COMPANY NAME]'s Customer Success Story Program. [COMPANY NAME] success stories highlight customers and the benefits and results they have achieved with our products and services. It's a great opportunity for you to document and measure your successes and gain positive exposure for your best-practices approaches.

We aim to keep the process quick and convenient for all involved. Here's what's involved in a success story project:

Interview—A writer will contact you to schedule an interview at your convenience. The writer walks you through a set of questions regarding your experience with [COMPANY NAME] solutions. Typically, interviews take 30 minutes to one hour.

Draft Review—You will receive a draft of the success story for your review. Circulate the draft to those individuals who need to review it at your company, make edits, and changes in the draft, and send it back to [COMPANY NAME]. [COMPANY NAME] will then provide a clean draft for final approval.

Final Approval—Sign the release form or have it signed by an authorized company representative and return the form to [COMPANY NAME].

The total time estimated for your participation is 1 - 1.5 hours, with the interview taking the majority of the time.

Success Story Use—You will receive an electronic version of the finished success story. It will be posted on our web site and will also be used in sales opportunities, sales training, newsletters, direct marketing campaigns, and public relations opportunities.

We appreciate your consideration regarding participation in our success story program. Please contact [NAME @ YOUR COMPANY] for additional information.