



Case Study Release Form

Before writing and then publishing a case study, it is important to secure consent. This template can be used to obtain your client's consent. **Note: This is not legal advice, this is a guide.** A consent form should be used for each unique case study. You may also wish to outline the proposed use of your case study. Copy and paste the text below into your desired platform and modify as desired.

Case Study Release Form

Customer Information

Customer Name:

Contact:

Email:

Address:

Phone:

[YOUR COMPANY NAME] Information

Contact:

Email:

Phone:

YOUR COMPANY Solution Featured in Case Study:

[Customer] approves the [YOUR COMPANY] case study, which is an intensive analysis of how [customer] has used [YOUR COMPANY]'s products and solutions within [customer]'s environment. [Customer] agrees to the use of the [customer]'s name, logo and quotes referenced in the case study.

Customer grants permission to [YOUR COMPANY] ("[YOUR COMPANY]" means [YOUR COMPANY] Corporation and all entities which it directly or indirectly owns or controls) to use the Customer's company name and logo in a published listing of [YOUR COMPANY] customers for use in [YOUR COMPANY] marketing materials and on [YOUR COMPANY]'s web site. Customer grants [YOUR COMPANY] permission to provide any necessary Customer related information to a relevant third party, including but not limited to printing companies, videographers and/or other agencies, for the sole purpose creating marketing materials and awareness. Customer also gives permission to [YOUR COMPANY] to distribute materials referenced above, in electronic or hardcopy form, in whole or part, without fees or additional

permissions, in internal and external press and marketing activities such as, but not limited to, presentations, proposals, papers and on the web.

Customer understands that audio, photographic and/or videotape/digital recording has been/will be taken of Customer and/or its personnel for possible use in promotional activities by [YOUR COMPANY]. Customer acknowledges that all Customer personnel subject to this Approval are at least 18 years of age.

Customer understands and agrees (1) any of the materials mentioned in this Approval may, at [YOUR COMPANY]'s discretion, be displayed, reproduced, and referred to by [YOUR COMPANY] in presentations, sales calls, on [YOUR COMPANY]'s website, and at other [YOUR COMPANY] sales and marketing situations and events, and (2) [YOUR COMPANY] will own all copyrights to the Success Story, Case Study, the technology solution description, the video and any other material produced by [YOUR COMPANY]. [YOUR COMPANY] will not be obligated to make any payments to Customer (as royalties, usage fees, service fees, or otherwise) for usages permitted by this Approval.

All text/material can be used in whole or in part without further permission in the media and formats outlined in this Approval, including but not limited to social media, the press, analyst reports and the like. This also applies to translations for international use.

Customer may cancel this Approval in whole or in part by giving a written cancellation notice to [YOUR COMPANY]. Upon receipt of such cancellation notice, [YOUR COMPANY] will endeavor to swiftly remove the published text from its website and from any future publications.

Customer has executed this Approval by and through its duly authorized representative.

Customer Signature, Date

Print Name