

# CASE STUDY CHECKLIST

## BEFORE YOU BEGIN:

- Get a recorder ready to record your notes from your phone call.
- Have some pre-prepared questions or talking points to help stimulate an interesting conversation and root out a good story. Remember, the more relaxed they are, the more natural the conversation and the more likely you are to find a good hook.
- Have a notebook and pen ready to scribble any notes or specific details worth remembering.
- Pro tip! If your interviewee makes a really interesting point, note the time on your recording and jot it down in your notebook - that way you can easily jump to the good bits of a 20 minute phonecall.



**Have a phone call:** Speak to your school/student/teacher on whom you're basing your case study



**Disclaim:** Ensure the person you're basing the case study on knows what you'll be doing with the information they give you



**Transcribe** your notes from your call



**Find your 'hook':** What was said on the call that will make people care about your story? What were the 'juicy bits'?



**Start to draft:** begin to put words down onto paper



**Word count** is on average 600-800 words for a case study, so don't waffle! Make each word matter



**Check editorial guidelines:** if you're writing an editorial case study, check the editor's requirements to ensure it will be accepted



**Get approval:** if you're using anything more than a brief quote from someone outside of your company in any content, you need to get their approval before sending it anywhere. Getting sign-off on content helps to prevent any nasty surprises and iron out any issues before they go public. Keeping your brand ambassadors happy is crucial

# STRUCTURING YOUR CASE STUDY

**Title:**

Doesn't need to be clever, just mentioning the teacher/school involved and highlighting the 'hook'. Make sure it's not just puff - For instance, "Mrs Jones gets Mathemagical!" tells us nothing about the story, or why we should care. However "Math Magic at St James' High Boosts Grades from C to A" at least highlights what the story is about (also, never use exclamation marks in titles. Ever. It's like laughing at your own joke.)

**First paragraph:**

Introduce your school/teacher, the problem, and allude to how your product could be the solution. NOTE: in an editorial case study, you likely won't be able to do so by name.

**Second paragraph:**

Focus on the 'problem' the school faced, then at the end of the paragraph introduce the solution.

**Third paragraph:**

Focus on the solution. Again, if this is an editorial case study, reference the techniques and creativity of the teacher over your solution.

**Fourth paragraph:**

Begin to round up the case study and come to conclusions about how the school has benefitted. It is at this point that most publications will allow a fleeting mention by name of the product you're selling. Up until this point, you can only do so with subtle suggestion.

**Conclusion:**

A couple of brief lines in summary. Can be useful to end on a powerful quote from the teacher.

**FINAL NOTE:**

How many times have you mentioned your brand/product by name? Go through and count. For an editorial case study, more than 2 explicit mentions and you're pushing your luck!