



Case Study Questions

The more detail the better – one- or two-word answers don't provide much to work with!

1. Who was the client/customer?

Company name, industry, links to relevant resources (website)

2. Who is our contact?

Name, job title, do they agree for us to invent quotes for them to approve or would they rather provide?

3. What was their problem?

The situation before you began providing products/services and what prompted the change.

4. How did they compare their options?

Personal referrals? Google reviews? A quick search?

5. Why did they choose you?

Ideally 3-4 key reasons.

6. What did you provide?

A clear list of services or products.

7. Describe the on-boarding or transition process.

The steps involved in getting things off the ground. Teething problems are very welcome.

8. What difference did working with you make?

Improved performance? Growth? A more productive team? Tangible facts and figures are always useful if available.

9. What's next in your relationship?

Plans to expand what you do for them? New challenges you can help them solve?

10. Would they recommend you and, if so, why?