

Using Case Studies to Make Your Case

By Dan Richards
November 10, 2009

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Case studies rank as one of the most effective ways to tell your story to prospects. Well-written case studies can be more persuasive and memorable than the typical marketing material which advisors use with prospects.

Partly it's because when most of us tell our story, it is about us rather than about the client.

Partly it's because peoples' eyes glaze over at most corporate brochures. Featuring similar words and pictures, they all look pretty much the same. It's not that most marketing material isn't well written or produced, but the sameness of the typical marketing material erodes its impact

And partly it's because most marketing material appeals to the intellect – for most prospects, selecting the advisor they're going to work with is driven by their emotional response to a few key questions: Do they like and trust this advisor? Do they feel comfortable working with them? Do they actually believe what he or she says?

Case studies can help translate advisor-speak into client benefits. The typical case study is a classic before and after scenario, divided into three steps. First is the problem – the situation clients were in when they began working with you. Then follows the solution – your recommendations. Finally you provide the outcome – where clients are today as a result of the work they've done with you.

Case studies work best when you can tailor them to the prospect you're dealing with – for instance showing business owners case studies involving business owners and retirees examples of retirees. To make this work most effectively, you'll need an arsenal to utilize, depicting a few different client scenarios. You also have to be cognizant of the need to preserve client confidentiality – in addition to masking any details which would give the client's identity away, you need to secure your clients' permission to use them in your case studies.





In the ideal world, you'd offer prospects the opportunity to speak to the client who you've profiled – and you may run into the odd prospect who makes this request if you don't offer it.

Personal references can add a huge impact to the credibility of the case study, As long as you haven't divulged anything confidential or potentially embarrassing, you can ask the client if they would be willing to take a call from a prospective client – as long as you don't make this request too often, most clients are happy to oblige.

As you think about how you're going to tell your story to prospects, consider using case studies. Well-written and relevant case studies can be among the most powerful weapons in your marketing arsenal.

Dan Richards conducts programs to help advisors gain and retain clients and is an award winning faculty member in the MBA program at the University of Toronto. To see more of his written and video commentaries and to reach him, go to www.strategicimperatives.ca

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