Why Your Case Studies Hold You Back (Part 4 of 4)
You Can't Get Access to Meaningful Results

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Here is the final posting in our Case Study Writing Series. As discussed, from the perspective of clients, there are three issues with most case studies:

1) The business problem solved
2) The insight
3) The results

Let's now focus in on getting access to the kind of client results that will be meaningful to prospects.

Clients often don't provide access, because they see no benefit in providing you with this data.
From the perspective of clients, why should they even bother going through the hassle of providing you with this often complicated (and sometimes sensitive) data... when you won't know what to do with it?

This first step in gaining access to this information is to make it a standard part of your strategy and client management process.

1) The subject is best covered at the outset of the project. By waiting until the end of the process or campaign, they're already convinced you don't value the information. It's definitely too late when you hit the point of, "Oh my God, we've got to brag about this campaign and write our case study now."

2) What is the benefit to the client of providing you with this information? Within the context of articulating and confirming the objectives, the client is more likely to work with you on what it will take to measure their performance. In fact, if this information is provided in real-time, you'll even be able to optimize the campaign to provide better business impact.

3) Paint a picture: demonstrate exactly how you will track the campaign performance. Some agencies are providing real-time online dashboards to paint a picture of performance - very compelling to a client. We've directed you to this example from MMG previously. Note their dashboards in the top left. When clients can see exactly how they will benefit, credibility is fully established.

4) Be prepared to flex with their existing monitoring systems. Many clients already have their own internal dashboards. Changing their current systems will not be an option. Adapt accordingly. Even better, augment.

5) Ask like it's expected. It's amazing what a client will do when asked with authority and with confidence. Don't make a big deal of it. However, if it is fact true that they should provide you with this information, then simply make it clear that it's a part of your process.

Here's the reality of the situation.
While you still may get push back from clients, at least attempting to deploy some of the above strategies will increase your likelihood of getting access to the data you need to make your work more credible. We know countless agencies that simply fail to even pose the question. As such, they often have the opportunity to report results, but fail in the end.

And Now, Plan B: What do you do if you just can't get access? Should there be no possible means to get this information - or you're prohibited from reporting the performance - report your results from another angle.

In the case study, describe what you and/or the client did track and why each was critical to the client's business. It is perfectly acceptable to mention that you are bound by confidentially, but can report that: "A significant double-digit increase was reported across the following six performance metrics." Go on to list those metrics. In a prospect's eyes, this simply demonstrates that you "get it." We've seen this alone build tremendous credibility.

Occasionally, you may be permitted to report performance increase, without indicating the base or final number. For example: "The campaign drove an increase in Comp Sales of 6.3% vs. YAG." You've reported the increase, without giving away that actual sales figures.

By demonstrating that you first understand what should in fact be measured, you begin to build confidence with clients. By then communicating that you drove increased performance across those metrics, you still effectively communicate the benefit of your work - in a way that is persuasive to prospects.

This clearly speaks to the fact that you: (1) outlined specific, meaningful metrics, and (2) achieved specific, meaningful results against each. And, you did this without breaking confidentiality.

We have also recommended to some of our training clients to conduct their own inexpensive, guerilla tracking if necessary. This can often include pre and post intercepts with web site/promotion/event/campaign exposure. Even small, but meaningful data points, will resonate.

The bottom line: You first have to prove that you are worthy of access to such critical information. The perception is that you're probably not. If you're still able to get (or permitted to reveal) the key impact metrics, then address those metrics that you did track.

Now grab that pencil and sharpen up your case studies!