

WORKSHEET:

# HOW TO WRITE A CASE STUDY THAT DRIVES LEADS & SALES

Life Science | Health Science | Agriculture | Agri-Food | Agri-Tech | Biotech | Healthcare | Food | Wellness | Health Products  
Nutrition | Laboratories | Medical



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MARKETING

# How to Use This Worksheet

Case studies are powerful content pieces designed for the later stages of the buyer journey. A case study tells a detailed story about a specific problem you solved for your customer, and how you solved it. The most persuasive case studies:

- ✓ Feature real-world problems and solutions
- ✓ Showcase your brand differentiators and value proposition
- ✓ Highlight your core competencies and most profitable offerings
- ✓ Tell a compelling story that ends with the client's success – with your organization as the hero

**Who this worksheet is for:** Brand managers, marketing managers, business development professionals, sales teams, small business owners, founders, and executives.

**How to use this worksheet:** For maximum benefit, this worksheet should be used as a planning and brainstorming tool to augment your content marketing and lead generation strategy. After completing it, you will have a skeleton of your case study so you can write it quickly and concisely.

# Case Study Worksheet

## Who is the client?

Company name:

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Company size (e.g., annual revenue, number of employees, recent mergers and acquisitions):

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Location/geography (city, region, state/province, country):

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Industry description (e.g., agriculture, food science, biotech):

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**Target audience(s) and segments:**

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**What are the client's overall objectives?**

(e.g., enter a new market, expand services, increase brand awareness)

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**What specific problems are they facing?**

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

# What are their time and resource considerations?

Desired timeline:

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Milestone requirements:

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Budget/resources:

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Bottlenecks/roadblocks:

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# How did you solve your customer's problem?

## Solution overview:

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## Step-by-step explanation:

- Step 1:

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- Step 2:

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- Step 3:

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- Step 4:

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- Step 5:

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**How your solution was unique compared to competitors:**

- Unique factor 1:

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- Unique factor 2:

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- Unique factor 3:

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**What was the outcome?**

**Specific result for customer:**

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**Relevant metrics achieved (#, %, market stats):**

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**Specific benefits customer experienced from your solution:**

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**Big-picture impact on customer's business** (sales, growth, differentiation, profitability, markets entered, etc.):

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**Conclusion**

**How/where can people learn more about your business?**

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# You're Done!

Now that you've compiled the key elements of your case study, it's time to write it. Some tips:

- Keep it short
- Write in plain language
- Avoid excess jargon
- Design your case study so it's eye-catching and compatible online
- Add the case study to your website
- Publicize your case study on social media
- Create a landing pages to capture lead information
- Nurture leads with a follow-up email

## Want More Help?

[Get in touch with us](#) to learn how we can help you develop a content marketing strategy that sets you apart while driving website traffic and leads. At FreshLeaf, you'll find marketing professionals who...

- ✓ Understand scientific concepts and industries
- ✓ Are experienced working with technical management teams
- ✓ Value strategy for marketing success and business growth

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