

HOWTO...

write customer success stories

Objective

Success story, case study, customer testimonial – whatever you call them they are a valuable sales and marketing tool. Their aim is to impact the buying decision. In a companion guide, HOWTO... use customer success stories, we described how success stories have a major positive impact on sales, and encouraged you to create a list of the success stories you need to maximise your business. In this guide we get down to the nitty-gritty of writing the success story.

Gathering the information

You have listed your target set of success stories, you have gained customer agreement to participate in a success story, and, if you followed the advice in **HOWTO... use customer success stories**, you may even have written the first draft of the story soon after you won the sale. Now that the project is complete it is time to gather the final information and complete a draft that is ready to submit for customer approval.

Your aim is to tell the story from the perspective of one or two of your customer's senior executives, so you must take this opportunity to conduct an informal interview with them. Not only will this provide information and quotations to use in the success story, it is also a great opportunity to convince them that the project was an even bigger success than they realised. This requires preparation.

Talk to the Account Manager and ask the questions that you will ask of the senior executives when you meet them. Your Account Manager may know the answers, which will help you to prepare follow-up questions for the executives. Offer for the Account Manager to join you in the meeting. Talk to the Project Manager or whoever was responsible for delivery or implementation so you know what actually happened. If you exceeded customer expectations then you want to be able to mention it to the executives you meet, if you fell short of expectations in any area then you need a defence.

Now you are ready to talk with your customer executives. Face-to-face is good, but telephone is more efficient. Take them through the subject areas listed later in this guide, and listen. First and foremost the story is about how your customer achieved success, so listen to their story. Use what you have learned in your preparation to prompt them if necessary, and try to give value by providing them with a few nuggets of information they may not already know. Listen for one or two strong quotations – no need to get them verbatim, people rarely say things as succinctly as they would like, so they will be happy for you to re-phrase them.

Structure

Very few readers will want more than 2 pages in a success story; just one is even better. An un-read success story is as good as no success story. Don't try to cover everything about the project, you have already decided which messages you want to get across with success stories, so choose the one that fits and stick to that. Permit yourself just one extra message – an unexpected benefit or surprise outcome adds interest and makes it more personal.

There is a natural 3-stage structure to a success story:

- 1) the customer was facing a business challenge,
- 2) they took action,
- 3) the action achieved results. Tell your success story through these stages.

Challenge

This section sets the scene. Who had the challenge? Why was it important, i.e. what impact was it having on their business? Why was it hard to address, and why had they not addressed it already? What was the cost of not addressing it, or the benefit to be gained if they did address it? What was the compelling event that caused them to address this challenge at this time? Your objective with this section is to have the reader identify with the challenge.

Action

Here you describe how they addressed their challenge, and how your organisation helped. What did they do to address the challenge? How big was the project, how many branches, units, people, etc were involved? Which of your products or services did they use? How did your products or services help? Why did they choose you? What were the features of your offering that they particularly liked? How did you make it easy for them to address their challenge? In this section you are demonstrating how your products and services can impact the business challenge, and why they are the best choice. This is where you bring out key messages that relate to reasons to choose your offering. Quotations along the lines: "We chose XYZ because they were able to prove that their customer service was superior", or "I did not consider XYZ at first because I thought they were too pricey, but when we did the ROI it was clear they were the most cost-effective" work well here.

Result

This part describes the business benefits this organisation achieved by using your products or services. It is often the most difficult part, but without a statement of the real business benefits the success story lacks "teeth". What was the financial gain in terms of costs reduced or revenue increased? Strive for real financial measures, or if your customer is reluctant to disclose try asking for percentage increases. Were there "soft" benefits, such as increased customer satisfaction, or reduced staff turnover? What is their perspective for the future, e.g. are they going to roll this out to other branches, or is there a next stage they they now plan to implement? The objective here is

to show that the benefits are real, quantifiable and compelling. This is the call to action, you are saying to prospective customers: "the benefits are significant, you need this".

What now?

A powerful set of success stories takes time to assemble, so make success story gathering a regular feature of your sales and marketing programme. Make your list of target stories, select the customers that fit the messages, and get writing.

HOWTO... checklist

Check that your customer success story has the essential ingredients:

General

- Attention grabbing title?
- Senior executive(s) named and quoted?

Challenge

- Who had the challenge?
- Why was the challenge important?
- The cost of not addressing this challenge?
- Why did they finally decided to take action?

Action

- What did they do?
- Project size, timescale, etc
- Which products and services?
- How did your products and services help?
- Why did they choose you?
- Which features were particularly important?

Result

- Financial benefits
- Operational benefits
- Soft benefits
- Surprise or unexpected outcome
- Future perspective

What do you think? If you have comments on this **HOWTO... sales and marketing** guide, or new ideas, questions, or requests for new guides then email us on **HOWTO@solutionsforsales.com**, or go to **www.solutionsforsales.com**