

CASE

STUDIES

THAT

CLOSE

SALES

A proven formula to attract
great customers

BRIAN M c C A R T H Y

Case Studies That Close Sales

A Proven Formula To Attract Great Customers

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Warning:

For this book to help you, you need two things:

First, you need a great product or service.

It could be a coaching program, online courses, live event -- anything that transforms people's lives.

Second, you must truly care about your audience.

Because this book isn't about milking your audience for every dime.

It's about diving into the incredible accomplishments your customers achieved. Then sharing their story in a way that connects with readers and inspires them to buy.

In this book, you'll discover *The McCarthy Method* to generate sales by sharing your customer stories.

With this method, you can close more sales without:

- Spending more on traffic
- Complicated funnels
- Obnoxious sales tactics **cough* false scarcity *cough**
- Some shiny new object that may not even work for your business

The key piece of this method is the *Hero's Journey Case Study*.

This lets you call out your best prospects -- and prove beyond a doubt that you are their #1 option to buy from.

Over two years, I created *Hero's Journey Case Studies* for clients including Ramit Sethi, Ron Reich, and T. Harv Eker. In this book, you'll discover how to create them for your business.

Better yet, you'll learn how you can use them to increase sales immediately.

Here's a peek at what you'll discover in this book:

- The future of online marketing -- 2 global shifts that prove small businesses that don't use case studies may be left behind (Chapter 1)
- *The Case Study Cold Traffic Buster*, the *High-Ticket Follow-up*, and 23 other ways to boost sales using case studies (Chapter 3)
- How to hook readers using the DIPP opening (Chapter 5)
- How to use "benefit stacking" to ramp up the desire for your product/service (Chapter 5 as well. Chapter 5 is pretty awesome)
- How to turn skimmers into buyers using "*Mind Reading Crossheads*" (Chapter 7)

- How to write world-class emails, sales pages and more using *Case Study Scraps* (If you hire copywriters this can save you a fortune -- and a lot of headache) (Chapter 9)

Well, that's enough of that, don't you think?

Let's dive in...

Chapter 1: How To Stand Out and Close 15-25% More Sales

The doctors scared the heck out of Kaylene.

Her autistic son was only four years old. And he wasn't talking like the other kids. His only form of communication was quoting movies.

If he wanted something, he might say a phrase like *"Give me back that dust!"* from Pirate Fairy.

She turned to the doctors for help. And they told her he likely would *never* have a normal conversation.

But that wasn't the worst part.

The worst part was the daily, violent meltdowns.

Like the time he ran towards the couch, grabbed his newborn baby sister, and tried to head-butt her. And he would have succeeded if Kaylene didn't swoop in at the last second and pull her baby away.

Intense stuff, right?

Now imagine for a moment you are a mom in a similar situation.

Your autistic child can't have a "normal" conversation. And you're worn out from the violent meltdowns.

You see a story like this.

And you learn *exactly what this woman did to turn things around.*

You see how, within 3 years, the meltdowns stopped.

And you hear the story of the day this boy walked up to a kid he didn't know in the park, introduced himself, and started a conversation. And how Kaylene's jaw hit the floor when she saw this. Because the doctors had said he'd *never* be able to do that.

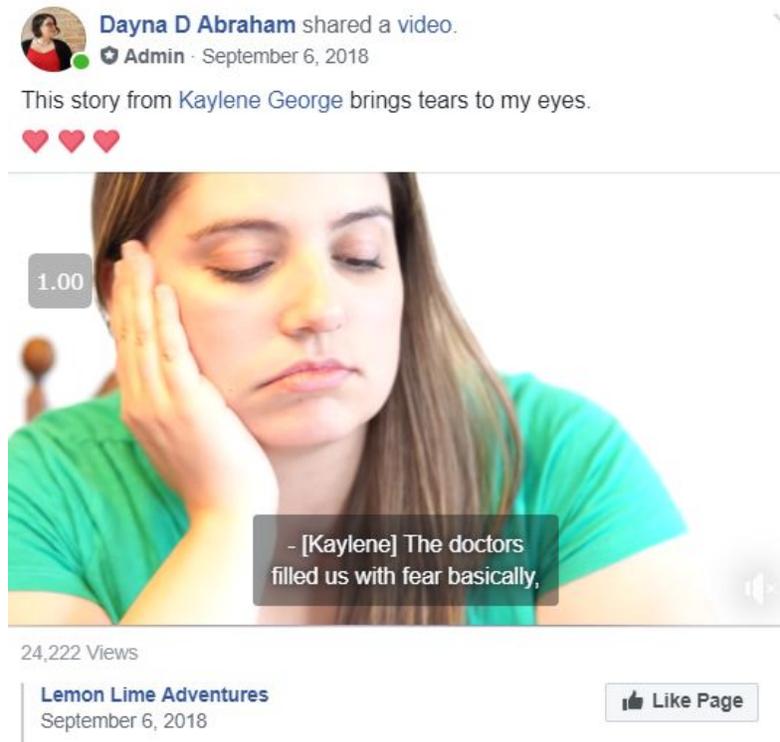
If you're in a situation like this, you're going to be desperate to know what Kaylene did. So you can do it, too.

And that's what makes *Hero's Journey Case Studies* so powerful.

They target the specific pains, fears, desires, and objections of your customers.

This particular story is a case study I created for a client.

It was one of several we used to get people excited for a product launch. This one in particular got 24,222 views on Facebook from organic traffic.



I may or may not have teared up several times helping to create this case study.

Telling stories like these was a big reason this launch earned 256% more revenue than the previous launch.

But that's just the start of what case studies can do for you.

Case studies have been proven to increase sales 185%.¹

My own clients have used them to boost sales 15-25% during launches.

And they helped one client close multiple \$10,000 coaching packages -- even after the prospect initially said "no" over the phone.

Now the fact that case studies increase sales isn't breaking news.

But this is:

¹ Patel, Neil. <https://neilpatel.com/blog/why-you-need-to-create-case-studies-and-how-to-generate-leads-from-them/>

Case studies are no longer a “nice to have.” They’re becoming critical to both short-term sales and long-term survival of a business.

That’s not me talking. That’s data.

Studies have shown that **91% of buyers look for reviews before buying.** And **84% of people trust online reviews as much as their friends!**²

What does that mean?

Businesses that rely on case studies have a huge advantage. Without them, you’re in a similar spot the newspapers were in when the “interwebs” was invented.

The newspapers ignored the warning signs and *SPOILER ALERT* it didn’t go well.

Now you may be thinking:

“Oh wow, the case study guy says case studies are important. Shocking!”

Well, it ain't speculation. I got proof, yo!

There are 2 massive global trends showing why case studies are becoming a must-have. They are...

2 Global Trends That Prove If You Don’t Use Case Studies, You May Get Left Behind...

Imagine you want a romantic vacation with your honey/sweetheart/boo/cat/random waitress you just met/whoever.

What do you do?

If you’re like most humans, you’ll head to a site like Tripadvisor.

You’ll look for a place that *lots of people say is awesome.*

But not just any people, people like you.

You find one place that has 15,948 reviews and an average of 4.8 stars. Nice!

² Bloem, Craig. “84 Percent of People Trust Online Reviews As Much As Friends. Here’s How to Manage What They See.” *Inc.com*, Inc., 31 July 2017, www.inc.com/craig-bloem/84-percent-of-people-trust-online-reviews-as-much-.html.

But the reviews say things like:

“What a great place for kids! My 7 year old had a blast!”

Nope! You know that’s not for you. If a loud, sticky seven year old is having a good time then you ain’t gonna get the romance you want.

Your customers are doing the same thing before they buy from you.

They want to see:

- 1) Lots of people singing your praises
- 2) People *just like them* getting the results they want

The leaders in the online marketing world have known this for a long time.

Look at people like Jeff Walker, James Schramko, Todd Herman, Ryan Levesque, Ramit Sethi, Russ Ruffino, Tony Robbins -- and pretty much any big-shot guru you can think of.

They all invest time and sometimes tens of thousands of dollars in case studies.

They show *lots of proof* and target those stories at different audiences, which you’ll learn how to do in the coming chapters.



90 Day Year™ Case Study | Multiple Businesses | Laura Dunn
Todd Herman • 5K views • 3 years ago
If you want to learn more about the 90 Day Year™, visit <http://the90dayyear.com>
<http://youtu.be/uoOSDi2igl0> If you are wondering ...

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³ Herman, Todd. “The 90 Day Year Will Be Re-LaunchiNg Soon!” *The 90 Day Year*, Herman Global Ventures, LLC, Jan. 2016, www.the90dayyear.com/90DYwaitlist/.

Success Stories



Meet Nagina
The busy working mother who got her first 550 subscribers in less than 2 months



Meet Heidi
The fashion designer who made \$30K in 5 months teaching Adobe Illustrator



Meet Kimberly
The career coach who surrounded herself with top performers and launched a product



Meet Paula
The television producer who made \$29,000 from her online courses



Meet Naveen
The business consultant who made \$10,000 online before he even had a website



Meet Tom
The physics tutor who landed his first 500 subscribers and killed his inner "wantrepreneur"



Meet Bryce
The "frazzled entrepreneur" who went from \$500 to \$14,706/month and built a business that runs by itself



Meet Sarah
The relationship coach who earned \$33,000 in 6 months in a highly competitive market

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The screenshot shows the SuperFastBusiness website header with navigation links: PRODUCTS, BOOK, BLOG, PODCAST, VIDEOS, ABOUT, LIVE, LOGIN. The main content area features a case study article titled "642 – Idea To Best Seller In Just 6 Weeks – Case Study" dated April 3, 2019. The article text reads: "Steve Mastroianni is many things - rockstar, father, guitar coach. Now, he's also an author of the bestselling book, 'Practice Less, Play More'. Hear how he went from zero to bestseller (across five different countries) in a matter of six weeks." Below the text are social media share icons for Facebook, Twitter, and LinkedIn, with a "0 Shares" indicator. At the bottom of the screenshot is a video player with a play button and a progress bar.

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⁴ "Success Stories." *GrowthLab*, GrowthLab, 2019, growthlab.com/success-stories/.

⁵ Schramko, James. "642 – Idea To Best Seller In Just 6 Weeks – Case Study." *SuperFastBusiness Online Business Coaching*, 3 Apr. 2019, www.superfastbusiness.com/business/642-idea-to-best-seller-in-just-6-weeks-case-study/.

Case Studies

Jeff Walker - 1 / 6



From Success to 73x Success

Jeff Walker



From zero to \$100k (with Product Launch Formula) - from Jeff Walker

Jeff Walker



Growing Your Business by 17x (and It's Not All About the Numbers)

Jeff Walker



The One-Day Workweek

Jeff Walker



Jeff Walker - Product Launch Success

Jeff Walker



Creating a Six Figure Business - Jeff Walker and John Gallagher

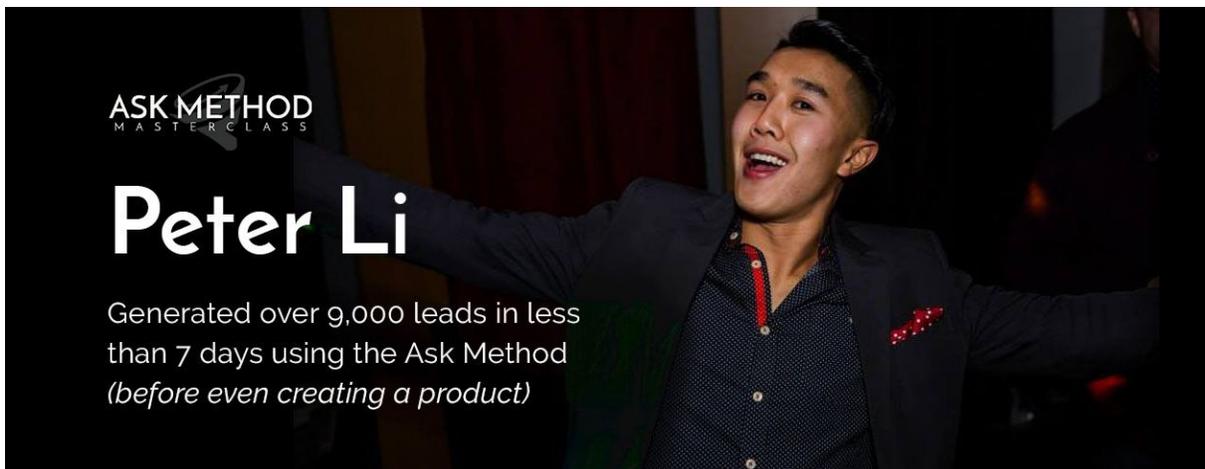
Jeff Walker

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⁶ Walker, Jeff. "From Success to 73x Success." *Jeff Walker*, 28 July. 2018, www.youtube.com/watch?v=B5VekKiptA0&list=PLwGsKFM2InRnwt-T9Pz2YXvuaEypo_HLe.



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⁷ Robbins, Tony. "Conquer Your Fears." *Tonyrobbins.com*, 2019, www.tonyrobbins.com/stories/unleash-the-power/conquer-your-fears/.

⁸ Li, Peter. "ASK Success Story: Peter Li." *ASK METHOD* © | by Ryan Levesque, The ASK Method Company, 2017, askmethod.com/blog/success-stories/peter-li/.



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But going forward, it won't be *just* the leaders flexing their success.

It will be everyone.

Because those who don't will get swallowed up in tidal wave of competition. They'll be ignored and fall behind.

That's not me talking. That's data. Here are 2 facts to show you why that is.

Global Trend #1: Your Competition is Growing

Thanks to the aforementioned interwebs, it's never been easier to start a business.

Studies show that 13,038 new businesses open *every week*¹⁰

On top of that, experts say the average American sees as many as 4,000+ ads a day¹¹!

The fight for attention is only getting more cutthroat.

Your competition may be able to outspend you. They may have marketing geniuses coming up with brilliant ideas.

The good news is that a lot of your competitors probably don't care about helping people as much as you do. They don't get the results you get. So sharing those results is the one competitive advantage they can't replicate.

⁹ Ruffino, Russell. "\$1 Million. 6 Months. Client Case Study." *Clients on Demand*, 5 Sept 2018, https://www.youtube.com/watch?v=_k8bjnLPnQs.

¹⁰ Simpson, Jon. "Finding Brand Success In The Digital World." *Forbes*, Forbes Magazine, 25 Aug. 2017, www.forbes.com/sites/forbesagencycouncil/2017/08/25/finding-brand-success-in-the-digital-world/#3ed9b1a7626e.

¹¹ Fussman, Cal. <https://hbr.org/ideacast/2016/02/the-art-of-the-interview.html>



Your competition -- like the Stay Puft Marshmallow Man in *Ghostbusters* -- is growing

Global Trend #2: The world is moving closer to *extreme personalization*.

If you wanted to buy a car a hundred years ago, you had one option.

Now you've got a zillion.

Want cereal? Same deal. Whether you like corn, wheat, granola, chocolate, peanut butter, apple, or whatever the hell Kashi is, they've got you covered.



Your customer has options.

If you want to be the top one, you got to prove your the best *for them*.

That's why segmentation funnels like Ryan Levesque Ask Method are so hot (and effective) right now.

Sexy hooks, a "big idea", a clear "USP" isn't enough anymore. That's just the ante to get into the game.

If you think one message will resonate with all the different types of customers in your market, you're in trouble.

The game today is all about customization.

It's about showing potential customers you understand their unique pain and desires.

Then proving your doohickey is perfect *for them*.

Now for the good news!

The fact you're reading this book already gives you a huge leg up.

In the following chapters, I'll break down "The McCarthy Method" for creating and using Hero's Journey Case Studies to multiply your customers.

It took me 2 years to refine this process.

It uses the formula used for Hollywood blockbusters like Star Wars, Harry Potter, and The Avengers.

But I've simplified it so anyone can do it. And infused direct-response marketing strategies to ensure the stories close sales. (I mean, Skywalker's journey had nothing to do with overcoming objections and closing sales. But that stuff matters for you.)

I've used them with clients in all types of markets: business, high-performance, fitness, parenting, art, and more.

You'll get more emails like this. Which came from a woman who bought my client's \$2,000 program after reading a case study:

"The case studies helped me make the decision to join.

*I was already in Copy Chief and thinking about joining, but I was intimidated. **I thought it may not be designed for people like me**, who are not copywriting pros already (I write mostly content like white papers and websites for a professional firm, but only wrote direct response copy for my own course and for some friends).*

So hearing from someone like Melanie (one of the case studies) was very helpful.

And then hearing from others who are miles ahead of me, but who used to battle the same insecurities I have, really convinced me that the RFL process will allow me to discard this head trash (and if not discard it, at least I'll have new approaches to manage it)."

-- Maria Granovsky, *Real Free Life* customer

But first, you may be thinking:

"Eh, I've already got testimonials. Those are good enough."

Or maybe you have case studies and think you're all set.

The next chapter goes deeper into why testimonials aren't enough anymore.

Plus you'll learn the 3 mistakes people make that suck the selling power from their case studies.

If you're going to put time and money into doing them, you may as well do them right.

The next chapter covers my TEC formula to make sure your customer success stories resonate with readers and motivate them to buy.

Fun stuff!

Chapter 2: The Hidden Reason More People Aren't Buying from You (And How to Overcome it)

A few years ago, I was in a miserable job making \$10.25/hour (hooray for getting a psych degree!)

I stumbled onto a list where this guy launched a course on how to find a job you love.

It was exactly the program I needed. But I didn't pull the trigger.

If you asked me why I would've said: *"It's too expensive."*

And there was truth to that.

But the real reason was *I didn't think it could work for me."*

In my mind, the guy who created this program was super motivated and driven.

I mean, he spent his college years practicing job interview skills with friends. I spent that time playing rugby in a suit with a cooler of margaritas on the sidelines.

He was a best-selling author in his early 20's. I was 25 with no clue what to do with my life.



Me in the yellow hat in the rugby suits game.

Now, his copy was great. He hit a lot of my pains and desires around my job perfectly.

And there was a truckload of testimonials. But it wasn't enough.

I looked at them and thought, *"Sure, it worked for them. But can it work for me?"*

I had to **see it** to believe it. I had to see the journey of someone like me having success with the program. Not simply be *told* it would work with someone like me.

There were also long case study interviews with successful students.

I watched the first few minutes but gave up quickly. Because I couldn't identify with the people in the videos.

Again, I got the vibe they were all hyper-motivated high-achievers. The odds any of them would spend a full Sunday watching football was awfully low. They didn't seem to be my people.

A few months later, I found a program by this guy named John Carlton. He talked about how we went from a "total slacker" in his early thirties to a wealthy and successful copywriter. And he had a program to help me do the same.

Now we're talking!

I thought *"I'm not as much as a slacker as this dude seemed to be. If he can do it so can I!"*

Now keep in mind, I knew and trusted the guy selling the job course on *more*. Because I had been on his email list for a long time.

But his stories didn't resonate with me. John's did. So John got my money. (And my gratitude because his course changed my life.)

Right now, you have potential customers in the same situation.

Your product is perfect for them.

They may even know, like, and trust you.

But they're not buying.

Not because "it's too expensive" or "I don't have time."

(Sure, they may say that. But you and I both know that's usually just an excuse.)

They just don't think it can work for them.

Your job is to prove beyond a shadow of a doubt that it can.

You can't do that with testimonials. Because they don't answer the "*Will this work for ME?*" question.

You need context -- a story -- that **SHOWS** the full transformation.

For that, you need a case study.

But there are a few major mistakes people make when creating these.

If you're going to put the time and money into creating one, you may as well make it as powerful as it can be.

So you'll want to avoid these 3 mistakes. And use my TEC formula instead...

Three Mistakes Sucking the Selling Power from your Case Studies

Mistake #1: The long, boring case study

I've seen companies do long 20-60 minute case study interviews with customers. But the view rates are super low.

Because the first 3 minutes were spent on idle chit chat.

They talked about the weather or whatever else. So people's eyes glaze over and they tune out.

The tragic part was these videos had amazing content!

But it took 15 minutes to get to the good stuff.

You think your audience will wait 15 minutes -- or even 3 -- for you to say something interesting?!

When it comes to case studies, you've got to hook them right away.

You can do this through:

- Ramping up the **drama**
- **Identification** characteristics
- Sharing the core **problem**
- Highlighting tangible and intangible **promises**

In the McCarthy Method I often combine all 4. I call it the DIPP opening because I'm not very clever and just mashed the first letter of each key component together.

You need at least ONE of those elements in your opening. But all four is 4X more powerful.

If you have none, your reader will get bored. Then hit stop and go watch cute baby goats instead.



Most Funny and Cute Baby Goat Videos Compilation

funnyplex 9.3M views • 2 years ago

The most cute and funny baby goat videos. Best goat compilation 2016-2017 to laugh! Puppies ...

This is your competition

Mistake #2: The all-text Q and A case study

One way I've seen people collect case studies is to this: You email your customer a list of question then copy and paste their answers onto your site and BOOM! Case study is done.

This is great for adding more in-depth social proof. But it's not nearly as strong as it could be.

Because there's no STORY. There's no emotional journey. You're not *showing* how the person went from struggling to successful. It's just lines like:

"Yeah I was scared I didn't have the money but I did it anyway and am so glad I did!"

Again, without context it's not believable. And you don't show HOW they overcame that objection. So the reader is still stuck on how to overcome it themselves.

Mistake #3: Using the wrong format

Believe it or not, some people (nerds like me) still prefer reading over video.

Other people (cool kids, I assume) prefer watching videos.

Most businesses only cater to ONE of these groups with their case studies. It's either all text, all video, or all audio.

But think of your customer. Some of them are coming across this page while on the toilet at work. They don't want to play some video. Then the fact they spend 20 minutes hiding in there every afternoon will be found out.

That's why I created a Hero's Journey Case Study Format that blends video and text. People get the full story whether they want to watch or read. (And you can always cut the audio into a podcast as well.)

How to Create Kick-Ass Case Studies Every Time

If you want to avoid these mistakes, up your social proof game and get your customers saying things like *"Well if they can do it so can I!"*

...then you need 3 things.

You need the TEC Formula.

That means case studies that are:

- 1) **Targeted**. They hit on the specific struggles, fears, objections and desires of the readers.

You'll discover how to do this using the Guess Who Method for finding case study participants. Plus how to use the DIPPS opening to call out to hook your different avatars.

- 2) **Easy** to consume. So people who prefer video and those who prefer text are BOTH sucked in.

- 3) Emotionally **compelling**. You're not just TELLING them your product works for them, you're showing them. And keeping them intrigued every step of the way.

So how do you do that?

By creating a Hero's Journey Case Study.

This is perhaps the most powerful marketing tool in your arsenal.

We'll cover how to create them in the coming chapters.

But first, let's make sure you're set up to squeeze every drop of value out of them.

The next chapter shows you 25 ways to use Hero's Journey Case studies to build your audience and close sales.

All by slipping them into what you're already doing in your marketing.

Chapter 3: 25 Ways to Increase Sales using Case Studies

The cool thing about case studies is you can use them at *any point* in the customer's journey.

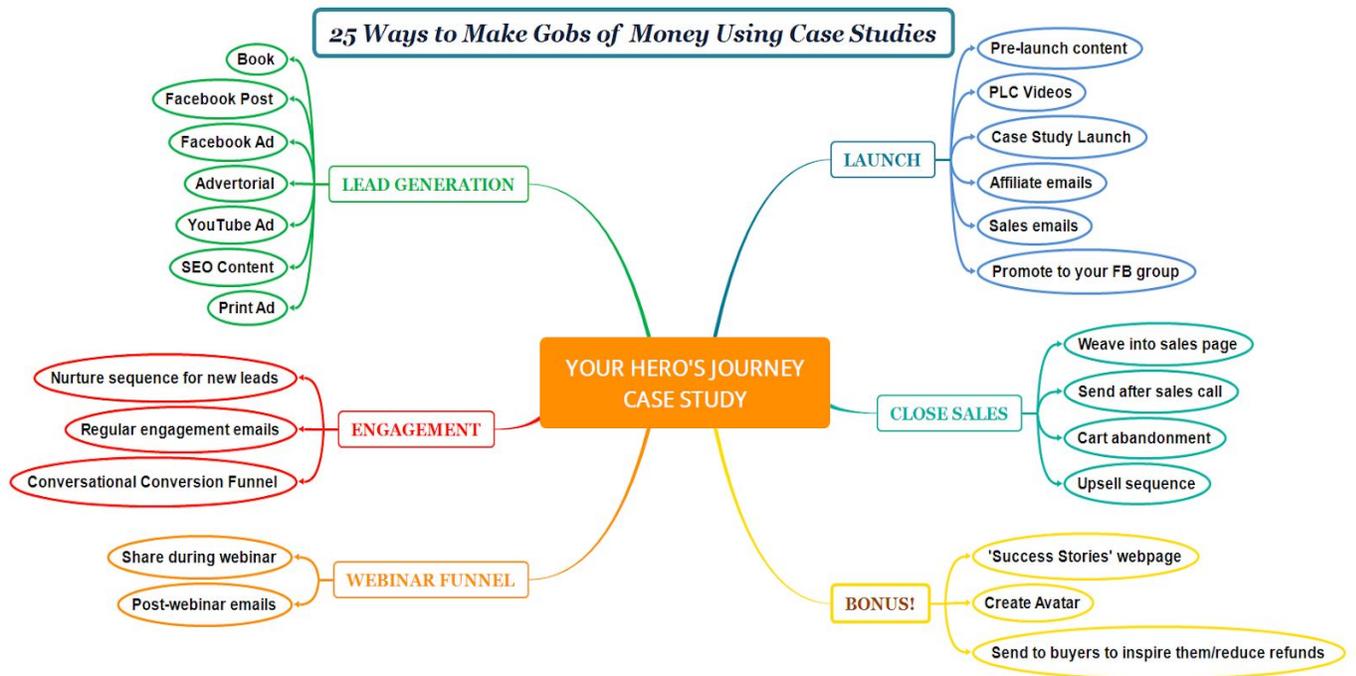
You can use them to **attract quality leads, increase engagement, close sales**, and more.

You can drop them into whatever funnel or system you have now -- whether you use a webinar funnel, PLF-style launch, evergreen email series, daily sales emails and more -- and see a spike in sales.

Or you can use them as the backbone for brand new campaigns. Even doing an entire launch or evergreen sequence that's just a few days of case studies followed by a sales page. (It works.)

The McCarthy Method is all about squeezing every drop you can get out of your case studies.

Covering the whole thing goes beyond the scope of this book. But here are 25 ways you can use them. Followed by a brief breakdown of the best ways to use them to get big wins fast.



Lead generation:

You can use case studies as the “tip of the spear” to get leads and subscribers.

For example, you can promote your case study in paid Facebook or YouTube ads. You can also post them on your site so they pop up in Google searches.

A great tip here is to use my “**Case Study Teach and Give**” method.

In your case study, you want to TEACH these new leads something valuable.

Then, you want to GIVE them something that helps them apply that lesson and get immediate results.

For example, I did a case study for a business coach.

During the case study interview, the person said that one of the big lessons she learned from this coach was how to overcome her “money blocks” -- the negative beliefs she had around money that were making it hard for her to become successful.

So in the case study, we TAUGHT people about the importance of overcoming money blocks.

Then we GAVE them a free one-hour recording on how to overcome their own money blocks.

And by “gave”, I mean they could get it once they signed up for the email list.

The key thing to remember when using the Teach and Give method with cold traffic is whatever you give (ebook, training, etc.) must be *congruent with what you taught in the case study*.

For example, if the case study taught you how to get leads through Facebook and then the giveaway was a training on money blocks, it wouldn't make any sense!

You want the thing you give them to be something they already learned about in the case study.

Now, let's say you want to go a step further. You want to close the sale *immediately*. And **get new customers coming in everyday through case studies**.

In that case, you tweak the call to action at the bottom of the case study.

Instead of telling them to download a free report, training, guide, checklist, or whatever -- you tell them they can learn more about how to get those results by clicking to the next page.

That next page is of course your sales page.

If your product is evergreen, you can use this **Case Study Cold Traffic Buster** to get customers daily. This method is all about sending people from Facebook, YouTube, or whatever else to your case study.

These are becoming more and more critical. Because Facebook LIKES when you share happy, uplifting stories. And that's what Hero's Journey Case Studies are.

Now, if your product is only open for a limited time each year, you obviously won't want the sales page to follow the case study.

Instead, you'll want a page that says something like:

"Sorry, the course isn't open. Click here to join the waitlist".

This can be super powerful. Because if people can't have something, they want it more.

The List-Building Sales-Closing Quiz:

Clickfunnels grew to a \$90 million business in 3 years.

If you got to their homepage, you'll see a quiz on the top right. It asks you all kinds of questions about what business you're in, how long you've been doing it, etc.

When you're done, they send you a case study. They show you how someone in your exact situation had incredible success using Clickfunnels.

By doing this, they prove to a wide range of entrepreneurs that this product is perfect *specifically for them*.

You can do the same. It's a great way to grow your list and generate sales at the same time.



Engagement:

One of my clients sends out a case study every single month to their list. They increase engagement and generate sales.

Even if people don't buy (maybe they don't have the money or it's just not the right time), case studies let you prove over and over how effective your program is. And when you use my Hero's Journey Case Study format, you do it in a way that's fun and enlightening.

So when they are ready to buy, they turn to you.

Launches:

Aside from case studies the #1 thing clients hire me for is launches.

I've worked on maybe 3 dozen launches that have made 6 or 7-figures. And case studies are always a big part of them.

We often use them for "pre-launch" -- as you saw in chapter one. The stories get people excited for the product release.

During the launch, I'll often share case studies. For example, if I'm using the Product Launch Formula, it's super important to include case studies within the videos. Otherwise, you're just making empty claims. And you leave doubt that this product can really work specifically for the viewer.

But most important of all, I use case studies towards the end of the launch to overcome objections and close sales.

Evergreen Funnel:

One of my clients is a top online business coach. His evergreen funnel consists of his most powerful case studies followed by an option to join his \$2,000 program. It brings in a sale nearly every day.

The Conversation Conversion Funnel:

This is a type of funnel Dean Jackson pioneered. It's all about having one-on-one conversations with the people on your list. So they feel you truly understand them.

I won't go into details on how to do it (check out Dean's Email Mastery book and course instead). But if you're using it, having case studies can be super powerful. Because you can learn about each customer's specific situation -- then send them a story of someone just like them getting the results they want.

Weave it into your sales page:

You can also weave these stories into your sales page. Here's an example from Bookkeeper Business Launch.

They took a case study I did for them and used it as the lead in their sales page.

"We don't have that money just laying around our house..."



It was Valentine's. The most romantic day of the year.

Liz found herself in an unexpected conversation.

She was feeling tense. Her husband was about to buy something big and hadn't told her about it...yet!

"I'm going to go meet this guy this afternoon," her husband said.

Liz spun around from the kitchen looking into the living room where her husband sat on the aging recliner.

"What?! We don't have that kind of money laying around the house!"

Liz sighed, grabbed her bag, and slipped out the front door. She knew what she had to do.

Outside the house, Liz spotted the family's little red Mitsubishi. This was the family's second-hand car. And, it was on its last leg.

Liz slumped into the driver's seat. She felt a bump against the baby's car seat behind her. Another reminder of how bad they needed a bigger vehicle.

"I thought we'd be driving something nicer by now," Liz thought, before putting her mind to rest. She had to get to her destination before it closed.

As Liz approached the large, bulky, front doors of her local bank, it struck her. The money she needed was going to have to come from **her business bank account**.

As Liz made her way in, the teller greeted her: "Withdrawal or deposit?"

"Withdrawal. Can I get \$3,500 in cash, please?"

"Sure, what's the account?"

I've written dozens of sales pages over the years. Having a compelling story that addresses your readers problems, proves your product can help them, and uses social proof is one of the best openings you can have.

Turn Your Customer Support Team Into World-Class Salespeople Overnight:

Putting a customer support chat box on your sales page has been shown to increase conversions as much as 40%. The problem is, these chats are often run by customer support staff. And they often are not highly trained in closing sales.

What you can do is create a "stable of case studies" that targets different demographics, objections, problems and more. Then, when your customer starts asking questions, your

customer support rep can say: “Your situation sounds a lot like Jim’s. This story should help you.”

Then your customer support rep sends the prospect a copy of Jim’s case study. Which, since you followed my Hero’s Journey Case Study format, is designed to connect with the reader, overcome their objections, and inspire the prospect to take action and buy.

The Case Study Launch:

A few years ago, there was a company in the men’s dating market that was struggling.

They ran a workshop that was a mid-5-figure investment.

Their messaging wasn’t working, so they changed things up.

They redid the sales page. And their funnel consisted of about 8 days of case studies showing the transformation their customers achieved.

After that... the sales came pouring in.

They made multiple 6-figures and their business was saved.

The **Case Study Launch** can be especially valuable if your audience is tired of your current launch funnel. Or if they’ve seen that 3-part video training workshop so many times their eyes glaze over when they see it coming.

The case study launch let’s you show the transformation available through fun, insightful stories. While proving your product gets results.

The High-Ticket Follow-Up:

One of my clients runs a high-ticket mastermind program. He would get on the phone to talk with people and see if they’re a good fit.

Sometimes they would tell him things like: “*I need to think about it more*”.

Which is a usually nice way of saying “no.”

When that happened, my client would send them a case study after the call.

He had a bank of 6 case studies to work with. So it was easy for him to show the prospect a story of someone like them who had success from his coaching.

He says doing this has helped several prospects “get off the fence” and join his program. All he had to do was email one case study and he made back 5X what he paid for it.

So, if you’re selling a high-ticket product and need to give people a nudge, send them a case study after your call. Let it do the closing for you.

Facebook Retargeting:

One of my clients used case studies in a simple Facebook retargeting campaign.

People who saw the sales page but didn't buy would then see case studies about this program popping up on their Facebook newsfeed.

It was a last-minute idea that we scrambled together. Yet that alone led to a 15% boost in sales from the launch.

Increase retention for membership sites:

A big issue for membership sites is people simply don't use them.

But when you share customer success stories, people are not only more likely to buy -- they're more likely to stick around.

For example, my friend Abbey Woodcock created a site called The Freelance Co-Op. It's all about helping freelancers earn more, work less, and have less stress.

What sold me was hearing stories on how other copywriters used the trainings in the course to become their client's favorite copywriter.

What kept me was hearing even more of stories of how other writers were using the trainings to make more and have more regular income.

It was a constant reminder that there was more there for me that I hadn't looked at yet.

Plus I got a touch of FOMO. I started to think:

"Everyone else is kicking butt with Abbey's trainings. I better get in there and get some results myself. I don't want everyone else succeeding while I fall behind..."

So Abbey got more and more of my money. And I got more of the wonderful benefits that came through following her trainings (a more systemized business, better client communication and more repeat work, etc.)

Create fresh content (even a book!):

The case study itself can be used as a blog, email, landing page, sales page, lead magnet, and more.

For example, one of my clients, Kevin Rogers, took copy from a case study I created for him and used it as an engagement email to get readers to join a copywriting training.



Kevin Rogers kevin@copychief.com via infusionmail.com

to me ▾

Allison had simple goals...

1. Quit her job,
2. Get paid to write copy, and...
3. Earn enough to travel the world on her own schedule.

She knew it was possible, but she also knew there were hazzards.

She'd heard “horror stories” from other freelancers -- how they were forced to work for free or deal with clients who didn't pay.

Even those who had good clients could lose them overnight, so their income could vanish instantly.

She didn't want to end up like that.

“I know a lot of people who are traveling as freelancers, but they're broke. I didn't want to be another 'starving freelancer.'”

You can also turn the stories into an ebook. For example, if you teach moms how to overcome postpartum depression, you could very quickly turn out a book like: “How these 9 moms overcame postpartum depression.”

There's a very successful entrepreneur in the fitness niche who did something similar. He put on a webinar selling a high-ticket coaching program. If people didn't buy, he would send them an ebook full of case studies showing the success other people had with his help.

Create a Success Stories Superpage:

It's amazing how few companies actually have this.

New readers are going to be skeptical of you. Putting all your case studies on one easy-to-find page makes it easy for them to see you're both legit and can help their specific situation.

When I worked for Ramit Sethi, I helped him create over a dozen case studies. All targeting different demographics, markets, objections, fears, desires and more.

Success Stories



Meet Nagina
The busy working mother who got her first 550 subscribers in less than 2 months



Meet Heidi
The fashion designer who made \$30K in 5 months teaching Adobe Illustrator



Meet Kimberly
The career coach who surrounded herself with top performers and launched a product



Meet Paula
The television producer who made \$29,000 from her online courses



Meet Naveen
The business consultant who made \$10,000 online before he even had a website



Meet Tom
The physics tutor who landed his first 500 subscribers and killed his inner "wantrepreneur"



Meet Bryce
The "frazzled entrepreneur" who went from \$500 to \$14,706/month and built a business that runs by itself



Meet Sarah
The relationship coach who earned \$33,000 in 6 months in a highly competitive market

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The cool thing about a page like this is, your reader doesn't even need to read the stories.

If they read one, then see you took the time to tell a dozen more stories, they'll see you're legit.

Alright, now you've seen some of the ways to use case studies.

But how exactly do you get them?

Who should you interview?

And how do you get them to say yes?

We'll cover all that and more in the next chapter...

¹² "Success Stories." *GrowthLab*, GrowthLab, 2019, growthlab.com/success-stories/.

Chapter 4: The “Guess Who?” Method To Find The Best Customers to Interview



Alright, so you're down to do a case study.

But who should you interview?

Which one of your customers would make the best story?

Figuring that out is a bit like playing a game of “Guess Who”.

You want to start with a bunch of options. Then narrow it down until you get the best candidate.

Over the past few weeks, I've helped a few clients with this. Here's what we did:

Step 1: Build A Wall of Proof

First, we sent out an email that sent all past customers to a landing page.

The landing page was filled with questions for them to answer that would help us identify who was a good fit based on 1. Demographic information 2. Their struggle/where they were before joining the program 3. Their results.

The early questions were stuff like age, gender, married vs. single, etc. This would help us find people who matched our target demographic. (If your demographic is 40-year-old women, you don't want to do a case study from some 25-year-old guy. You want to do one on your main avatar because it will resonate with the most people.)

It's important to have those simple, multiple choice questions FIRST. It gives your customers momentum. So they're more likely to finish the survey. (If you start with an open-ended question it's more likely people will go "Ahhh I don't know" then close out the page.)

Step 2: Identify Obstacles

Next, we asked what obstacle almost kept them from joining.

This gives us a better sense of where they were before they joined the course. So we can start to get a feel for the transformation they had.

We asked a few other questions after that. But the most important were these two:

1. What results did you get from the program?
2. Give us an example of how those results made your life better?

This is obvious because you want someone who had great results. But there's something in that second question that's really important.

Surveys often lead to vague answers like: "My life is so much better!"

That doesn't help. We want something TANGIBLE.

That's why asking for an example is critical. (You could also ask "What is different about your life since getting those results?")

Framing the question that way leads people to give more concrete answers. To talk about how their day-to-day life improved. As opposed to the vague, useless responses.

For example, we had one woman say that the program saved her marriage and helped her earn 70% more income from her business.

Ding ding ding!

THAT is the response we're looking for.

After doing this, you'll have a bunch of bitching new testimonials you can use. (Your last question on that landing page should be a yes or no: "Can we use your replies in our marketing?")

But what we want is the best case study candidate.

So flip through the replies and cross out those people who:

1. Don't match your demographic
2. Started with an advantage (you want people who are *at the same level as your prospect or worse*. For example, if you have a product on how to become a best-selling author, you wouldn't want to do a case study on someone who already had a massive

following. Someone who nobody knows and has never written a book would be much better.)

Once you've eliminated the dull stories you're left with someone like Herman.



So you shoot Herman an email. And ask if he's willing to be a case study.

He'll be more likely to say yes if you do the following two things:

First, you want the email to come from the head of the business or main "guru". People are going to get more excited if Tony Robbins emails them asking if they'll be a case study than if someone from Tony's staff reaches out.

Second, let them know what's in it for them if they do this. They'll be more likely to agree if there's a strong reason why beyond it'd be a nice favor to you.

Some examples of how this may benefit them include: Free publicity (they get their name or business out there), leads, credibility, recognition, or a chance to inspire others.

If you can't offer any of that, it's okay. If you had a big impact on their life and they view you highly, you can simply ask for this as a personal favor to you.

Here's an email script you can use to ask someone to be a case study.

The Case Study Outreach Script

Hi NAME,

I hope your week is off to a great start!

You know, your story of (cool thing they accomplished with your program) is awesome!

I'd love to share your journey with our entire community. It could inspire a lot of people, and be nice exposure for you :)

Would you be willing to do a one hour case study interview with me?

We'll dive deeper into what you've done. So people who were in a situation like yours can see it's possible for them.

If you're willing simply reply "Yes" and I'll send you more details.

It will be a lot of fun. Looking forward to it!

Okay!

Now you know who to reach out to and how to get them to agree.

But what questions do you ask on the interview?

How do you get them to open up and "spill the beans" -- especially if they are shy or private?

The next section shares my "Hero's Journey" question sequence -- 23 questions I've refined over 2 years that all-but-guarantee you'll get a great story.

You'll also discover how to find "journey moments" for juicy, heart-wrenching stories.

As well as the "summer lovin'" technique to go beyond superficial answers and get the deeper pain, objections, and results this person experienced.

Let's goooooooooo!

Chapter 5: The “Hero’s Journey” Interview Sequence

After dozens of interviews, I’ve found a go-to list of questions I follow for case studies.

Use these and it’ll be hard NOT to get a ton of great info.

Some of these questions I developed on my own. A couple I stole from *Storytelling Made Easy* by Michael Hague.

I’ve broken them down to different sections that highlight different phases of your case study journey.

Keep in mind, it’s not always the question itself that gets you the gold — it’s the follow up. More on that in the next chapter.

For now, here are 23 questions you can ask in your case study interview.

These are broken down by the 7 steps in the Hero’s Journey case study.

This is similar to the Hero’s Journey Joseph Campbell talks about in his book by the same name. It’s the formula behind Star Wars, Avengers, and Harry Potter.

But there’s a twist...

... because Harry Potter didn’t have to overcome buying objections.

Luke Skywalker didn’t have other “gurus” promising to teach him The Force.

And Thor wasn’t selling spots to his \$25,000 Mastermind (though I’d join that in a heartbeat.)

You, on the other hand, are selling something. So overcoming objections, standing out from the competition, and closing the sale are critical pieces for you.

So Hero’s Journey Case Studies are a bit different. They consist of:

- The Intro
- The Search for Answers
- Taking the Plunge
- The Breakthroughs
- Climax
- Aftermath
- Wisdom/Next Steps (optional)
- Call to Action

For the first six steps, you'll need questions. So your case study participant can share each stage of the journey.

Now there are two types of questions to use: Narrator questions and Journey Moment questions.

Narrator questions spark answers that give you a general background to this person's story. The answers you get are like somebody narrating a story.

"Journey Moment" questions create answers where the person is *living* the story. These are specific questions where your case study subject brings you to a specific moment in that part of the story. The answers you get here will make the story more vivid and emotionally compelling.

Below are the exact questions I use for each step:

23 Case Study Questions

Introduction Questions

The job of the introduction questions is to get a picture of what this person's life was like before using your product/service.

You want to get a sense of their everyday life. The struggles they had. And why change was important.

1. What was your life like before you joined X?
2. What was the biggest challenge or struggle you had around [Thing your product helps them with]?
3. **Journey Moment questions:** Can you tell me about a low point or rock-bottom moment when you realized "something has to change...?"
4. What was the #1 goal you wanted to achieve? Why was that important to you?

The Search for Answers

Here you get to share the flaw with your competitors. And stand out as the only sensible option.

Because your case study participant probably didn't come to you immediately. Instead, they looked at all their options. They may have even bought other products from your competitors.

Here, you get to tell the wonderful story of how those products failed them.

You can ask questions like:

5) What other things did you try to achieve that goal?

6) Why didn't they work?

Taking the Plunge

Here we shift from your competition failing to you rising up to save the day.

You want to talk about how they discovered you and why they chose you over the competition.

This is a wonderful way to flex *what's different in unique about you/your product -- aka your USP*. But it will be even more powerful because it's your customer sharing that information, not you.

You can ask:

7) How'd you find out about our product/service?

8) What was your biggest fear or reservation about joining?

9) Journey Moment question: Can you tell me about the moment you decided to join X?

Breakthroughs

This is where you share what it was like to use your product. As well as the major breakthrough moments or lesson they had as a result.

This is also where you TEACH helpful information. What the viewer/reader learns here should help them move toward their goal *even if they never buy from you*.

Doing this proves your authority. Even better, it stimulates reciprocity -- because you gave them something valuable they will want to give you something valuable in return. (We talkin' \$\$\$ yo!)

Authority and reciprocity are two of the six buying triggers mentioned in Robert Cialdini's book *Influence*. (Fun fact, if you follow my Hero's Journey Case Study formula, you can hit 4-6 of those triggers.)

There's one more benefit of actually teaching useful information -- it leads to people *revisiting and sharing* this page. Both of which can lead to more sales.

Here, you'll ask questions like:

10) What was it like when you started using product/service?

11) What were the most helpful lessons/takeaways and how did you apply them?

12) What surprised you most about the product/service?

13) What was the hardest part about using X?

14) Did anyone discourage you from trying? Or make the process harder?

15) Did you ever feel like you wanted to quit? How'd you overcome that?

IMPORTANT NOTE: This step is the one most case studies skip.

And it's why most case studies suck.

They're all "And then this person bought the program and weeks later they began pooping rainbows and everyone lived happily ever after. Yaaaaaaaay!"

Vomit

People are sick of that story.

They don't buy it.

And it's not interesting.

What's interesting in a story is *conflict*.

That's why I ask questions like "What was the hardest part about using it?"

You want to show how they *continued to struggle* and how they overcome those challenges.

It makes the story more engaging and believable.

Plus, it's a chance to *overcome objections*. For example, a common excuse for why people don't buy may be "*I don't have time.*"

Here, you can now SHOW how someone else overcame the problem of using your product/service while not having much time.

Now your prospect can actually see how success is possible (instead of just being TOLD "it works for busy people, too!" Which is what your competitors are no doubt doing.)

Even better, there may be a lesson on how to get more done in less time mixed in. So your customer has something they can immediately apply to get results. Which makes them love you and triggers the reciprocity thing mentioned earlier.

Climax

Here's where they hit their goal — or the moment they did something else that was just as good to them as hitting that goal.

Questions to ask include:

16) What was the first “big win” you got using X? Or a moment you realized “Oh wow, this works”?

17) What was the biggest, most exciting result you achieved? **Journey Moment question:** Can you tell me about that moment that happened?

18) Were there any other major milestones?

New Reality

This shows how their life has reached a higher level than it was in the “before” picture. How they have a different day-to-day and outlook on life.

19) How is your life different now? Why is that important?

20) Can you tell me about a moment where you thought something like “I can’t believe this is my life now”

21) Now that you’ve had this success, what are you excited about next?

22) What advice would you have for someone who was in the same situation you were in before the program?

23) Anything else you want to share?

How to take those questions deeper...

The above questions can help you get your interview going. But the real gold comes from the follow-up questions.

Don’t just take my word for it. Cal Fussman, who interviews top celebrities and world leaders for *Esquire* magazine’s “What I Learned” column, says great interviews are all about drilling deep with follow-up questions.

He says:

“They will respond to my first question with a comment, and here’s where the real work lies.

*It’s in paying careful attention to their first response, so then I’m asking a second question based on their first response, and now that’s getting to a deeper answer. And **then I’ll be listening to that second response, and I’ll ask a third question that gets even deeper, and that might be where the nugget of gold lies that appears on the page.” Cal Fussman¹³***

¹³ Carmichael, Sarah Green. “The Art of the Interview.” *Harvard Business Review*, 7 June 2018, hbr.org/ideacast/2016/02/the-art-of-the-interview.html.

So what makes a good follow-up question?

You can always rely on the flow of the conversation and follow your own curiosity. But here are two tricks you can fall back on.

Follow-up Technique #1: Ask for examples

When you get a vague or general answer, ask for an example of what that means or what that looks like to them.

For example, when I sent a survey out, I asked a customer for an “ah-ha” moment she had using the course. She replied:

“Doing these practices and seeing relationships flourish around me”.

Okay, that sounds nice but doesn’t mean anything. It’s not going to excite readers because it’s so vague. So I asked for an example. She went off, spouting great lines like this:

“I got more clarity as to what type of environment and workplace I want. I left the job I was at and found another place that was much more in line with my values.”

Already we’re getting more concrete on how this impacted her life. These details alone make her story more compelling.

I continued to follow up on how these practices impacted her work life, and got this gem:

“When I first joined [my new job] there was animosity among team members. People didn’t want to share information... I brought these relating games in and team members became more open and honest with each other. It increased productivity by 200%. And I have the numbers to prove it.”

How about that!?

Concrete proof that the relating games she learned in the course not only helped her create better relationships at work, but it made her better at her job and doubled her team’s productivity!

She didn’t say anything close to this on the survey. And it took 30 minutes on the phone to get to this point.

But it proves the value of the product. It even showed us uses for it that we didn’t expect which would resonate with readers and show how it can benefit their life.

Follow-up Technique #2: “Summer Lovin”

You know the song Summer Loving, from Grease?

In it, John Travolta is telling his buddies about the date he had with Oliva Newton John. And she's telling her girlfriends the same.

For the chorus, the friends beg them to *tell them more* about the date.

[I was gonna print the lyrics here
But don't want to get sued.
Let's do karaoke and I'll
sing it for you.]

I do the same thing in case study interviews.

It's amazing. On some of my early calls I was super inarticulate and clumsy. I thought I needed these specific, hyper-targeted questions.

But that's the beauty of the follow up. You don't have to be articulate or clever because the person is already on a roll. They just need a little nudge to keep going.

For example, I interviewed a woman who told me how when she had success it felt "great!"

I asked her to tell me more, and she described the moment standing in her kitchen realizing she'd never have to worry about money again.

That scene is a lot more powerful than "it felt great."

Another example, I interviewed a woman on why she bought my client's course on how to become an accountant.

She said she wanted to get her accounting degree to get "an extra leg of credibility."

That's fine, but vague. So I very clumsily asked her to tell me more.

She went on to say that her manager would often doubt if her work was correct or not. And she wanted to be able to point to her degree on the wall and say "this is why I'm right."

That is a much stronger visual than "extra credibility." It taps into the real day to day pain and desires people like her have.

So don't take your customer's answers at face value. If something sticks out to you as interesting, if something is confusing, or if you know your audience will want juicy details -- dig deeper. Ask for examples or more info so your case study is meaty instead of vague and fluffy.

5 tips to get customers to open up

Getting the deeper story means your customer needs to be willing to open up. But they may feel nervous, uncomfortable, or simply need guidance to let loose and give you the REAL story.

Here are a few tricks I've picked up to get people to spill their guts:

#1: Don't assume you know the angle of the story going into it

You may go into an interview thinking "Okay, this case study is going to be for "busy moms". But as you dig deeper, you find that angle doesn't actually work with that person. Or there's another angle that's even better.

I went into one case study interview assuming it would be a "rags to riches" story. One that people who were in a tight spot financially could identify with and use for inspiration.

Except once we started talking, it became clear this angle wouldn't work. She had done well financially before doing our program. If I took that angle, it'd be disingenuous.

As the interview went on, I noticed the word "introvert" kept popping up in our talk. So we dug deeper into that. Turns out, this was a massive barrier for her early on. She thought that, being an introvert, our product wouldn't work for her.

I then learned people emailed her regularly, thanking her for proving introverts can be successful entrepreneurs!

Clearly this was a major pain point — and we weren't addressing it! So instead of making this a "rags to riches" story, it became a story of an introvert who made it in an industry seemingly dominated by extroverts.

That term "introvert" even earned a spot in the headline¹⁴. ([Source 12](#))

While it's good to have a sense of what pain point you'll address with a specific case study, keep an open mind and let the story to reveal itself. It's less work and will lead to a more compelling case study since it's raw truth.

#2: Tell them they don't have to answer any question if they don't want to

You'd think saying this would prime them to not answer. But it has the opposite effect. When you give people the choice to not answer, they feel free to open up.

In the past, I've done case studies where the interview started off stiff. Then I'd say, "By the way, if anything is too personal and you don't want to answer, you don't have to."

After that, the conversation flowed easier and more freely.

#3: Tell them their job is to be honest and share their experience — they don't need to try and sell anything

¹⁴ "Meet Selena - GrowthLab, Start and Grow Your Online Business." *GrowthLab*, GrowthLab, 2019, growthlab.com/success-stories/selena/.

If you've delivered amazing results, your customer will want to sing your praises and make you look good.

This can be a problem. Customers will over-analyze their answers to your questions because they want to make sure they paint you in a good light.

But if they're analyzing their words, they're not tapping into the emotion they felt before, during, and after they used your product. So you're not getting emotionally compelling stories or quotes. You're getting stiff, calculated answers they think you want to hear and will help you sell.

But it's the deeper truth — their inner experiences that doesn't get talked about or shared much — that's going to make your case study compelling.

So tell your customer their job is simply to be honest and share their experience. They don't have to worry about making the story sound nice because that's your job (or your copywriter's job).

#4: Stay positive, relax, and smile

This may be obvious but is worth reminding. Your state will impact how they feel. If you're tense because you haven't got great info yet, they'll feed off that and tighten up themselves. And you'll be less likely to get great material.

But if you're relaxed, smiling, and trusting that your questions will give you the information you need, then the customer can follow your lead.

#5: Be their cheerleader

Again, most people you interview want to be good case studies. But they have no idea if their answers are "good" or not unless you tell them. So throughout the interview, let them know they're doing great and you appreciate the information.

I'll frequently tell people I'm interviewing "This is gold!" after a great story or quote.

Even if the information seems weak, I'll still say things are going great because it is! The information I'm getting is at least keeping me from taking the wrong angle for the story. And some pieces may prove surprisingly valuable later when I look over my notes.

For example, one woman I interviewed wouldn't credit our program with her financial success.

At first, I thought this was a problem, but then found a new angle that made the story just as compelling (it was about the importance of the community we had in the program.) It turned out to be a blessing in disguise because now we got to show the value of a certain part of our product that had been glossed over in other parts of our marketing.

Finally, take notes and record the interview!

You'll want a recording for your records or in case you miss anything. Be sure they know it's being recorded and are cool with it.

Also, take notes as you write. I find it helpful to mark the time every 5 minutes or so in my notebook.

That way I know what is said when and can re-listen to a certain section more easily.

Okay!

After this, you should have about an hours worth of content.

You've got all these great stories, challenges and insights swirling in your head. And a messy sheet of notes.

Don't worry! The next section shows you how to organize all this.

You'll discover the Hero's Journey Formula to write high-converting case studies fast.

It shows you what to include when and where. So you know exactly what to include and in what order.

You'll learn:

- The DIPSS opening to attract your ideal customer
- How to prove you're better than the competition (without saying it yourself)
- How to use "ah-ha mindset shifts" and "action step breakthroughs" so your customer feels compelled to buy from you
- How to use "benefit stacking" so buying becomes a no-brainer
- And more!

Let's boogie.

Chapter 6: A Formula to Write High-Converting Case Studies Fast

After an interview, you're going to have WAY more material than you need.

The rookie mistake is to try and cram it all in there.

Or to blast out a bunch of quotes and stats with no cohesive story to tie it all together.

But if your case study is just an info dump people will tune it out.

You want it to be a proper story. One that sucks people in. Gets them rooting for the person. Has them SEE THEMSELVES in that person. And proves that YOUR PRODUCT can help the reader overcome their biggest obstacles and fears and transform their lives.

That's why I use the "Hero's Journey Case Study Formula."

1. The DIPPS Intro
2. The Search for Answers
3. Taking the Plunge
4. The Breakthroughs
5. Climax
6. New Reality
7. Wisdom/Next Steps (optional)
8. Call to Action

Section 1: The DIPPS Intro

In Chapter 2, we talked about using the DIPPS formula to get your customers attention. Here's how it works:

Drama

What was at stake for the person in your case study?

Why was it important for them to make a change?

What forces (internal or external) were preventing them from change?

Don't just share what this person wanted, share WHY. This makes the story more compelling. It also is a chance to connect with the deeper "why" of your prospect. Because it's likely they overlap.

For example, a lot of the case studies I write are in the "start your own business" market. The "Why" there is almost always the same. It's about freedom. They want more time to spend with their family. So I always include that desire early on.

Another tip to add drama is to include a *time constraint*. This is simply giving a deadline for when they need to achieve a certain thing.

For example, they needed to make an extra \$10,000 before they lost their house. Or lose weight before their wedding.

Identification -- This is where you get the reader to go "They're just like me!"

Share demographic and other information that allows your reader to IDENTIFY with the person in the case study.

If your audience is single 20-something introverted men, call out how your case study participant is a single 25-year old introvert.

Problem

What was the single biggest challenge your customer had?

How were they struggling?

This lets your reader connect with the person in the case study. Because this struggle should be the same one the reader is facing right now.

Even if the problem isn't the same, sharing the struggle creates *empathy*. It gets your reader to connect and root for the person in this story.

Promise

In the intro, you want to touch on the results your case study participant achieved.

If you did the *identification* and *problem* parts correctly, your reader will automatically assume they'll be able to get results like that too. Because they are in the same situation your case study participant was in.

I like to include 2 levels here. There's the **tangible** promise and **intangible** promise.

The **tangible** promise is the thing your case study participant wants. The **intangible** is **why** they want it.

For example, you may share how your product helped this person make an extra \$10,000/month. That's the tangible promise.

Then you may go on to say that it helped them do work that's more fulfilling. Or how they're not worried about money all the time anymore. That's the intangible promise. It's the deeper layer of what people want. But it can be vague. So tying it to something tangible helps people wrap their head around it.

Section 2: Seeking help

This section lets you highlight the flaws in your competitors. And show why you are a better choice.

Because odds are, the person in your case study didn't just turn to you the moment they had a problem.

They looked around for help. They may have even tried to fix it themselves. Or bought products from your competitors.

Here, you share *in their words* why those other options didn't solve their problem.

Section 3: Taking the plunge

Sometimes you can weave this into section 2. Other times, it can warrant its own section.

This is where you share *what made the person decide to buy from you*.

By doing this, you're showing your customers how to overcome their objections. Because your readers likely have similar reservations about buying from you as the person in your case study.

In this section, you show people how to overcome that objection. Often by giving them a new way to think about their objection.

For example, in some case studies, we shared how the person couldn't afford to join the program. So they borrowed money from a family member. Then paid them back with the money they made through our program.

This can help your reader see "*oh, I can borrow the money temporarily.*" Which is something they may not have thought to do.

For other stories, we shared the thought process around the buying decision -- about how the person would regret it if they didn't try it. Or how this seemed like the least risky of all the options out there, because it required less capital and had lots of success stories.

Section 4: Breakthrough

Here is where you share 1-3 things the person in your case study used to achieve success.

Ideally you want these to be lessons *that are immediately valuable to your reader*.

Most businesses skip this section in their case studies. They just say "*Then this person bought our program and lived happily ever after!*"

But people don't buy that. And it turns your case study into fluffy marketing. Not something *intellectually stimulating and useful*, which will lead to people reading the full thing and even sharing it with others.

Now, there are two types of breakthroughs I share: "Ah-ha! mindset shifts" and "action steps."

Ah-ha mindset shifts are simply new ways to think about a problem. You want to blow your customer's mind a bit and show how they can overcome their problem.

For example, one case study I wrote, the participant had a major "ah-ha" moment in realizing she could blend her passion for art with making money. And the two didn't have to be mutually exclusive.

Since our audience was artists who didn't think they could make money from their work, this is a belief we want to make sure they have. Because it'll move them one step closer to buying.

The "Action Step" lessons are more concrete lessons your readers can use today.

For example, when I wrote case studies for Kevin Rogers' course on how to become a freelance copywriter, we talked about the value of finding a "bat signal". Which is his term for picking a niche and specializing in a certain area of copy.

Then we showed how having a "bat signal" helped the person in the case study get more clients and referrals.

This is immediately valuable. Because readers can pick a speciality and start getting results *immediately*.

Of course, they may have questions about what their "bat signal" should be. Or they think, "*Sweet, I can use this to get more clients. But how do I grow from there? And how do I charge more?*"

To answer these questions, they're likely to turn to you. Because you already helped them solve one problem.

Plus, there's that whole "reciprocity" thing Robert Cialdini talks about in his book *Influence*. Basically, when you give someone something *they find valuable* they feel compelled to give you something of value back. So you give them valuable tips -- and they'll feel more compelled to give you money.

Section 5: Climax

Here, you want to share the major result they got.

This includes the "fast wins" and "big wins". Doing this, you show people both *how quickly* they can expect results and *how dramatic* those results can be.

You also want to go beyond merely showing WHAT they achieved and dive into WHY it mattered.

A great way to do this is by sharing "Journey Moments."

For example, you don't just talk about how, thanks to your product, this man was able to start a stay-at-home business and spend more time with his kids.

Instead, you share a particular moment to highlight that success.

Like the first day he spent working from home. When he walked his 8 year old to the bus and threw a football around while they waited. And the "pure joy" they each felt.

Which was a stark contrast to his mornings before he bought your course. When he would rush around and leave before his kids had even finished their breakfast. Because he was still working 9-5.

This paints a picture of what success looks and feels like. So your customers will want it more.

Section 6: New Reality

In this section, you show how their life has gone up a level.

This is a chance to share additional results and how that's impacted their life. And you show how your product led to *lasting success*.

For example, if you sell a weight loss product, the climax may be the day they hit their goal. The "new reality" would show how 6 months have passed and they haven't gained any weight back.

Another thing you can do here is "**benefit stacking**". This is where you can highlight all the other benefits your product/service created.

For example, you can share how their weight loss has also given them more energy to play with their kids. It's given them more confidence at work and helped them get promoted. And now they do triathlons every year because they learned they love them.

Section 7: Wisdom/Next steps

This step can often be wrapped into step 6. But you can also do it separately.

This is where you share *what is next* for your customer.

Now that they have achieved XYZ, what are they looking to do?

This drives home their "new reality." It shows how they have graduated to higher ambitions.

It's also a good place to build empathy and connect to your reader's *values*.

For example, you can share how now that your case study participant lost weight they are looking forward to helping their family members do the same. Altruistic desires like this can tap ignite your readers desire to help others. It's yet another lever you can pull to move them to buying.

Another thing you can do here is share “wisdom.” Your case study participant can share Advice and Mistakes.

- 1) What advice they would give to someone who is in the same position they were in. (Similar to “advice to their younger self.”)
- 2) What do they wish they had done differently? What mistakes did they make that the participant can now avoid because they are reading this case study?

Again this makes the story valuable for the readers. It can also increase their sense of urgency. Because you’ll often get quotes here saying things like “*I just wish I bought his years earlier.*”

Section 8: Call to action

After the case study, quickly recap the story. *Tell them what you just told them.*

“Using our product this person was able to go from [STRUGGLE] to [RESULTS] despite [PROBLEM OR OBJECTION].”

Then shift the focus onto the reader. Show how they can have success just like that too. All they need is to click below. From there, they can join your list, download your lead magnet, or go to the sales page where they can buy your doohickey.

This is also a great chance to show *how many people you’ve helped.*

For example, one of my clients has 4,000+ people in his program. So we show a screenshot of the forum and all 4,000 members. This ramps up the social proof even further and can ignite a bit of FOMO.

Finally, if there is genuine urgency, include that. If they only have until midnight next Thursday to join your program, say it. If not, don’t. You’ve just built up all this trust -- no sense ruining it over false scarcity.

For some people, it’s just not the right time to buy. They may need to feel their pain a little more. Or have a certain incident happen in their lives that make them realize “that’s it, something has to change...”

When that moment happens, you’ll be at the top of their mind. Because you’ve given them a story showing exactly how to climb out of the hole they are in. And you’ve proven someone *just like them* can get results.

If you want to see what this looks like altogether, you can check out some Hero’s Journey’s Case Studies I wrote for clients here: <https://marketingwithbrian.com/folio/>

Bonus Storytelling Tips

Don’t worry too much about these but they are great additions.

- **Include the case study participants goal.** You can fit this into section one or two. Example: “I wanted to make an extra \$800/month to pay for groceries.” This can connect to the same goals/desires your customer has. Plus it creates intrigue. Will they achieve

their goal? How? What challenges did they overcome? Your prospect has to read on to find out.

- **Bounce from positive to negative as you tell the story.** Something good happens when something bad happens. Movies/TV do this all the time. A scene that starts on a high note (people laughing/getting along) will often end in a fight or problem. And scenes that start with anger/drama end with hugs. This keeps it emotionally engaging.
- **Keep throwing obstacles at your case study participant.** Especially in the “Breakthrough” sections. Share the internal/external challenges that continued to pop up. And show how they overcome those challenges with help from your program.
- **Connect the pain or struggle to the teaching and result.** For example, in the struggle section, you can introduce this person felt like she was “failing as a mom.” Then in the teaching part talk about something she used that helped. Then in the “results” section maybe a quote about how she doesn’t feel like a failure and loves her kids and herself more than ever.

Alright, you’ve got your outline!

Now there is one part of the story that’s perhaps the most important -- the headline.

There are many ways to do this.

But I’ve got a simple formula that’s my go-to.

The next chapter shows you the “underdog” headline technique. As well as real-world examples of how people like Tim Ferris and Andrew Warner used them to help build a huge following of loyal fans.

Chapter 7: How to Use “Underdog” Headlines to Suck Readers In

A common way people create headlines is saying the person’s name and the result they got.

Something like: “How Shelia got her dog to finally poop outside.”

This is a big mistake.

Because nobody knows who “Shelia” is. They can’t identify with her in any way. Her name isn’t pulling any weight. So it’s a waste of space.

Instead, you want a headline that connects deeper with the person.

A great way to do that is to write a headline that shows someone at their level OR WORSE having the success they want.

I call this the “Underdog headline” because that’s what it is. You’re showing how someone came into this situation as an underdog but, thanks to you, came out on top.

Here’s a simple formula you can use:

How (ordinary person) did (amazing thing) using (your product/service/something they learned from you).

Or “How (ordinary person) overcame (BIG PROBLEM) without (having to do thing they don’t want to do)” (Such as: “How a stay at home mom lost 20lbs in 3 months without dieting”)

Here's an example I wrote:

Success Stories

Meet Melanie

How A Busy Mother of Five Became A Sought-After Freelance Copywriter



Before

After more than a decade as a stay-at-home mom, Melanie needed to start a new career. One that would let her become financially independent without sacrificing time with her kids.

Working with Kevin

She discovered how to "frame" relationships with potential copywriting clients. So they respected her and wanted to work with her.

After

Melanie earns a great living working from home and is now financially independent. She clocks out at 2:45 each day so she can spend the afternoon with her family.

Another example from a client I worked with:

A promotional graphic for a success story. On the left, a circular inset shows a woman with brown hair, wearing a white patterned top and a colorful necklace, standing in front of a wooden fence. The background of the graphic is a blurred image of an oil painting with various colors and textures. Text is overlaid on the right side of the graphic.

The Profit Canvas - Success Story

Kelli Folsom

How A Struggling Oil Painter Built A 6-Figure Art Business Within 9 Months

And here are other examples:

From [Mixergy](#)¹⁵

How Kimra Luna built a Facebook group while on welfare and turned a community into a million dollar business

10 likes · 1 author · f t

Kimra Luna, Be True Brand You, Brand (rebranding), Educational Company, Marketing, Non-Tech, Social Media, Women Founders



From [Tim Ferriss](#)¹⁶

Going from Obese to Bikini Body — Briana Case Study (Plus: New Tools, 4-Hour Body Group)

286 Comments

Share this: Facebook Twitter Email Reddit

Written by [Tim Ferriss](#)

Topics: [The 4-Hour Body - 4HB](#) [The Slow-Carb Diet](#)



¹⁵ “How Kimra Luna Built a Facebook Group While on Welfare and Turned a Community into a Million Dollar Business.” *Mixergy*, 3 Oct. 2016, mixergy.com/interviews/be-true-brand-you-with-kimra-luna/.

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From [CopyHour](#)¹⁷:

How Dan Meredith Went From Zero to 6-Figures (As A Marketing Consultant & Copywriter) In Just 6 Months



Aside from before and after, another cool trick is to use a quote highlighting your customer's struggle at their lowest point. A dramatic quote or line highlighting their struggle can be a great way to grab attention.

Here's an example from one of the case studies for DDP Yoga:



Doctors Told Me I Would Never Walk Unassisted Again

On February 9, 2007, I weighed almost 300 pounds. I was morbidly obese. I weighed two hundred and ninety seven

Alright, now you've got your headline done.

¹⁷ Johanson, Derek. "How Dan Meredith Went From Zero to 6-Figures (As A Marketing Consultant & Copywriter) In Just 6 Months." *CopyHour.com*, 1 Nov. 2018, copyhour.com/how-dan-meredith-went-from-zero-to-6-figures-in-6-months/.

What about the rest of the case study?

How do you make it *EASY* to consume?

The next chapter shows you how to increase engagement 70% using my Multiple Door strategy.

You'll also see how to use "mind reading crossheads" to turn skimmers into buyers.

Chapter 8: How to Increase Engagement 70% with “Multiple Doors”

Some people in your audience prefer to read.

Others want to watch videos.

You’re also going to have skimmers. People who will quickly scan the page and if nothing hooks them, they’re gone.

You can catch all these people using my *Multiple Doors* strategy.

This is all about using a multi-dimensional approach. It includes:

- 1) A “quick hits” section
- 2) Mind-reading crossheads
- 3) Telling the story through text, quotes, video, and images.

The Quick-hits section

Giving your reader a bit more information quickly can help draw them in to read the entire story. So under the headline, before you dive into the story itself, it may help to have a quick summary of this person’s story.

Briefly introduce the person and their big problem, how your product helped them, and the result.

Here’s an example of how that looks from a case study I wrote for Ron Reich¹⁸.

¹⁸ Reich, Ron. “Boris Enzel Case Study.” *Ron Reich*, 21 June 2018, www.ronreich.com/boris-enzel-case-study/.

Boris Enzel Case Study

How Boris Took His Info Product Business From \$500,000 to \$2,400,000 Within 2.5 Years



Before

Boris' had been stuck at the mid-6-figure mark for four years. He knew that if he didn't innovate, his business would eventually fall apart.

Working with Ron

He used the Genius Profit System to create higher-end products, upsell sequences, and refine his launches.

After

Boris blew past the 7-figure mark the following year, then hit \$2.4 million the year after. Though his business is exploding, he still spends up to 4 months at a time vacationing with his family.

The “Before” section shows the challenge Boris faced in his business.

The middle section is about how he used the program. It shows what he learned that helped him solve that problem.

Finally, the “After” section highlights his results. It's important to note that there are two layers here. There's the *tangible* result of growing to \$2.4 million. There's also a deeper layer of *what that result is important*. In this case, it showed this success allowed him to spend more time with family. Which is a core driver for a lot of entrepreneurs who would find themselves on this page.

Mind-reading Crossheads

These are quotes from the customers that call out the same pain, doubt, struggle, objections, and results your reader has or wants. You're essentially "entering the conversation going on in their mind."

I use them to start each of the 8 sections mentioned earlier.

For example, one case study starts with the quote "I needed an extra \$500/month for daycare..."

For that product, this is the exact situation the audience finds themselves in. They need to make a few hundred dollars a month extra. Usually to cover bills related to their kids.

The next section uses the crosshead: "Can you really get clients as a bookkeeper?" This case study was obviously for a bookkeeping course. And that's the exact doubt people have. So skimmers who have this same doubt are going to get sucked in by this quote.

Combine quotes, text, and video

Beneath each crosshead, you then tell the story through text, short video clips, and more customer quotes. This way, people can consume the story however they want.

The key to making this work is to make the content covered in the text and video slightly different.

So if they ONLY read the text, they will get the full story.

Same with the video. If they only watch the clips, they'll get the full story.

But if they both read AND watch the videos, they get the deepest, most valuable, and most compelling version of the story -- they're not just hearing the same things over and over.

One of my clients found that sharing short video clips increased views 3X. And watch time from 20% to up 50-90%.

Finally, you can suck in skimmers and make the story even more compelling by sharing pictures.

If you're selling a weight loss product, include before/after body images.

If it's business, show an actual screenshot of their revenue growth

But that's not all. You also want to share pictures of *why those results matter*.

For example, weight loss is great. But the real win may have been how this person now has more energy to play with his kids. If that's the case, include an image of that.

Or revenue growth may have been the initial goal. But maybe the big win is all the lives this person impacts with her business. So maybe show a picture of her with some of her happy clients.

For examples of what this looks like altogether, you can check out the samples on my site here: <https://marketingwithbrian.com/folio/> The links at the top of that page will take you to case studies I wrote for my clients that use this format.

Alright, now that your case study is written, I've got something special for you.

See, after you write your case study, you're going to have all this marketing gold still sitting there in your interview notes.

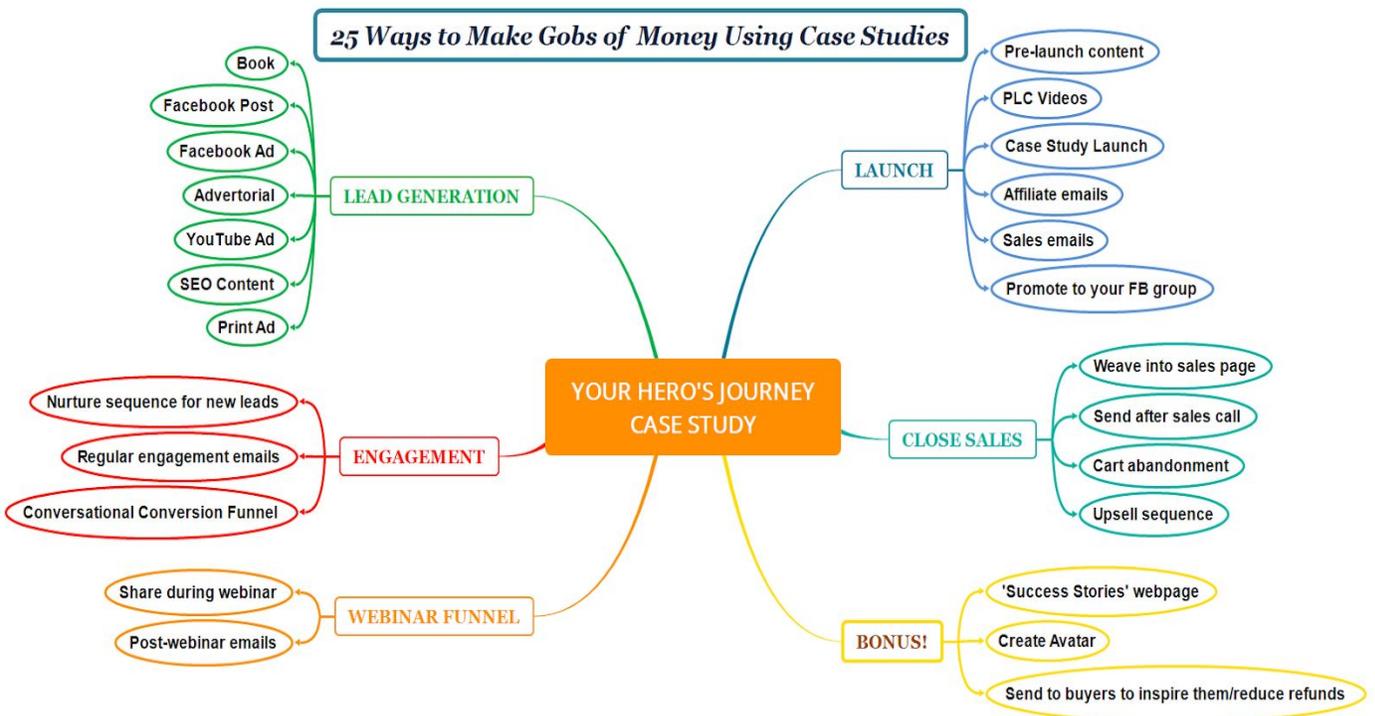
The next chapter shows you how to refine that gold. And create a "Language Guide" and "Proof Portfolio" that helps you write world-class copy fast.

This can also save you a fortune hiring and training a copywriter. Because they'll instantly know the deeper pains, challenges, and desires of your audience. As well as *the language they use to describe them*.

So you OR your copywriter can write hard-hitting ads, emails, and more in a fraction of the time.

Chapter 9: How to Save a Fortune Hiring Copywriters by Using Case Study Scraps

Remember, a single case study can be used in just about any part of your marketing.



But there is also a ton of gold in the interviews themselves.

The McCarthy Method helps you mine that gold.

I share two techniques for doing this below. They are critical if you hire a copywriter. Because they get your writer up to speed in a hurry. (They can also help you write killer copy fast.)

So they're targeting the exact pains, objections and desires of your audience. As well as the language they use to describe those things.

#1: Create a "Language Guide"

You may be familiar with "style guides" geared to helping writers nail the company voice and brand. This is similar. Except it let's you and your writers understand your audience's pain,

fears, objections and desires. And more importantly, you know *the language they use to describe those things*.

This makes it easy to repeat all those things back to them. And show them you understand them better than anyone else. Which leads them to buy from you.

To do this, make a list of the words and phrases they use to describe their problem, desires, and barriers. When you go to talk about that stuff in other parts of your copy (emails, a sales page, etc.) you can grab their exact language from your style guide.

For example, take that interview from the woman who needed help passing her accounting exam. The quotes about how she wanted the certification so she could “point to the wall and say ‘that right there is why I’m right’” can be used in emails when describing the value of the course.

Instead of using vague language like “this certificate will help you win the respect at work” we can use more descriptive, emotional language like “next time your boss tries to argue you can point to your certificate and say “that right there is why I’m right”.

The difference there is subtle but powerful. The first instance pays lip-service to what your reader wants. The second uses their language to reflect back their thoughts on the subject. It packs a stronger emotional punch because it’s more descriptive, precise, and closer to what’s actually going on in their head.

#2: Create a “Proof Portfolio”

Imagine if anytime someone had an objection, or said something like “I don’t think it can work for me” you were able to send them a case study of someone JUST LIKE THEM getting great results with your product.

Imagine if anytime you had to write a sales page or email, you had a “vault” full of all your success stories. All organized by demographics, objections, and the success they had.

That way you (or your copywriter) have all the proof you need at your fingertips.

For example, maybe you need a testimonial from a busy mom with young kids. You can go into your proof portfolio and pull out quotes proving your program works for busy moms.

It will make all your copy stronger. Because you’ll be able to PROVE every claim you make. And show your customers that your offer is perfect *for them*.

Bonus! The Case Study Checklist

Alright! That was a lot to take in.

You may feel a bit overwhelmed right now. But don't worry. I created a Hero's Journey Case Study checklist which you can get here: Marketingwithbrian.com/casestudychecklist

It will make sure you cover the key components in your case study.

So you can crank them out without getting bogged down in the details.

There is, however, a catch.

When you download the checklist you will automatically be added to my email list.

I write new articles around case studies and marketing weekly. Plus random life stories that can be a fun way to pass the time.

Of course, if you just want the checklist you can snatch it and then unsubscribe immediately. I'll only cry a little if you leave.

So go here now, before you forget: Marketingwithbrian.com/casestudychecklist

And if you want help with case studies email me at Brian@marketingwithbrian.com.

Double Bonus! Done-for-You Case Studies

After reading all that you may think:

"Ugh, this looks like a lot of work. I don't want to do all that."

Well, you don't have to!

You can reach out to me at Brian@marketingwithbrian.com. I can get all this done while you hang out on your balcony, drink tea, and ponder the meaning of life (or whatever you do in your free time.)

About the Author

Brian has written for multiple 6 and 7 figure campaigns. His clients include James Schramko, Ramit Sethi, and T. Harv Eker.

He got tired of trying to come up with clever hooks and stories to increase sales. And discovered a way to combine customer success stories with a Hollywood movie formula responsible for blockbusters like Star Wars, Avengers and Harry Potter.

Using this, his clients have been able to close 15-25% more sales during launches. On top of that, he has found ways to use those same stories to attract quality leads, make sales daily, and even sell high-ticket offers.

When he's not nerding out to marketing stuff, he's traveling for the heck of it, deep frying oreos, and claiming he'll "finally get good at golf this year" though that never seems to happen.



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