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Becky Livingston • Oct. 11, 2023



Case studies are an effective way to demonstrate your ability to meet client needs. It is a solid measuring ground for the outcomes and advantages of your team's knowledge, experience, and expertise.

Studies highlighting triumphs are a best-practice marketing method to capture the attention of prospective clients and nurture their conversion to loyal clients.

In March 2023, [Marketing Charts](#) ranked case studies at the top of the charts, at 62%,

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I get it. You're concerned that case studies will give away the secret sauce behind your firm's success. However, if written with a specific lens, you'll be able to keep your secrets while intriguing readers. Here's how.

1. **Customize each case study based on your target audience. Every case study is not relevant for every business owner. Take the time to immerse yourself in their world by addressing their specific pain points, goals, and industry-specific challenges. Then reveal an overview of how your team provided an effective solution.**
2. **Strike a chord with a captivating title. (This is where AI tools shine!) Then hook them with the story in the introduction. Make it sound personal, like a story you would tell someone at dinner.**
 - a. Highlight the client's challenges and pain points.
 - b. Dig into the solutions your team provided, explaining in high-level detail how you achieved success.
 - c. Incorporate relevant charts, graphics, and testimonials in the final design to enhance its overall appeal.
3. **Focus on tangible results for your client. Showcase the impact with quantifiable metrics and key performance indicators offering concrete evidence of success.**
4. **Incorporate testimonials to bring authenticity to your case study and add a "human touch" to your story.**
5. **Break down complicated concepts into visually appealing and easy-to-understand graphics, such as images, infographics, videos, and interactive elements.**
6. **Leverage SEO best practices when you're ready to post the case study online, including:**
 - a. Keyword research to identify the terms they use to find content like yours.
 - b. Title and headings written to draw the reader's attention act as signposts for search engines and human readers.

c. Incorporate your target keyword phrase throughout the case study. Keep in

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Case Study Promotion

Now that you have a case study and have followed the six steps above, it's time to promote it. Here are some marketing efforts to help you maximize its reach while boosting your website search ranking.

- Your website is a given. If you have more than one case study, create a navigational link that connects to a page with links to all your case studies by industry, topic, or solution.
- Leverage the power of social media. Sure, you can post the message organically (without using money), and hope you get some traction. A better method is to combine organic posts with boosted posts (costing a little money) and paid ads (costing more money) directed toward your target market. Through laser-focused targeting, bypass those who may not meet your preferred client criteria.
- Incorporate notices about the case study in your email marketing initiatives, including service- or industry-line staff email signatures. Within your email, provide a case study overview and its key takeaways. Make it short and sweet, with a graphic they will not miss.

Case Study Example

You might think creating case studies requires a ton of time and effort. However, there might be simple wins your team is accomplishing each day. Take this fictional bookkeeping service for a flower shop client.

Case Study: Blossoming Profits: How Our Bookkeeping Revitalized Bloom & Petal's Finances!

Challenge: Bloom & Petal, a local flower shop, struggled with disorganized financial

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operates more profitably, with clear financial insights.

By tweaking case studies to fit what your B2B customers are looking for and tackling their main issues, you can quickly and easily make content that grabs them right from the get-go.

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Becky Livingston is the owner and CEO of Penheel Marketing, a New Jersey-based firm specializing in social media and digital marketing for CPAs. With over 25 years of marketing and tech experience, she is the author of “SEO for CPAs – The Accountant’s SEO Handbook” and the “The Accountant’s Social Media Handbook.” In addition to being a practitioner, she is a dog lover, an active Association for Accounting Marketing’s (AAM) committee member, an adjunct professor, and HubSpot partner. Learn more about Becky and her firm at <https://Penheel.com>.

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