



THE *ULTIMATE* B2B CASE STUDY TEMPLATE

Case studies are valuable at every stage of the buyer's journey – from awareness and interest all the way to a purchase decision.

Writing a case study, however, can be difficult. We've created a case study template for an end-to-end document – from the headline through to the final call to action.

Use this template to create case studies that help prospects see they could success available when they work with your company.

Overall Tips:

- Use subheadlines to break up the text for each section
- Link to product and industry pages throughout
- You can gate a case study to garner leads – this works particularly well if your client is a high-profile name. However, if you're using the case study more as a sales tool to provide concrete proof points, it should be freely accessible.
- Create a case study template in Word or InDesign so that if you create multiple case studies, they look consistent
- Publish case studies under resources on your site
- Write a brief blog post about the application and link to the full case study
- Create at least three social media graphics that promote the case study and plan to publish one on LinkedIn each month for three months

1. Case Study Title (8-12 words)

Tips:

- Use a benefits-oriented statement
- Include numbers if possible
- Use client name if it adds credibility

✓ **Example:**

Optimizing Electric Parking Brakes with HIL and Durability Testers Using CANalytics

✓ **Example:**

Orange Electronics Reduces Time to Market by 50% Using Alfa Electronics TestMaster

2. Industry/Application

Tips:

- Align the industry with industries or applications as your company defines them
- If your client identifies themselves as an aerospace company, but your company defines their work in aerospace under “aero/defense”, classify this case study as “aero/defense”
- Similarly, use the application area to define the type of solution that was implemented. This could be “software services”, “production test”, or “hardware-in-the-loop testing”.

3. Challenge (25-50 words)

Tips:

- Use a simple statement or two to describe what problem your customer faced
- Define the problem as your customer saw it in the moment, rather than how your company defines it – the goal is for a prospect to relate to your client through a shared challenge

✓ Example:

Replacing costly external lab testing with a comprehensive in-house test system for the Dream Chaser® space vehicle’s nose and main landing gears.

✓ Example

Improving test automation and control functionality of an existing hybrid HIL test stand for electric parking brakes.

3. Solution (25-50 words)

Tips:

- Use a simple statement to summarize how you solved the problem
- Include your approach or key aspects (technology, services, teams) used to solve the problem

✓ Example:

Developing a turnkey system to accurately test the ability of the Dream Chaser® nose and main landing gears to withstand impact at touchdown.

✓ Example

Delivering a mid-height HIL tester with mechanical brake simulation and a full-height durability tester for 24-hour testing of multiple brakes.

4. Body (800-1200 words, about 6 paragraphs)

Paragraph 1 (Intro):

Tips:

- Introduce your client (who they are, what they do, who they serve)
- Elaborate on the problem they were trying to solve
- Describe why it is imperative that the engineering challenge be addressed
- If possible, mention other options they evaluated and why those solutions weren't optimal

Paragraphs 2-3 (Background):

Tips:

- Give a high-level description of how the solution must function and any key nuances (other technology it must integrate with, time constraints, etc.)
- Explain why the client chose you as a solution provider
- Describe the process you used when working through this client. Did it begin with discovery?
- How much (or little) involvement was required from their team?
- How were communication and project management handled?

Paragraphs 4-5 (Application Information):

Tips:

- Describe how the solution works
- Explain the benefits of the new solution
- Describe the results of the solution
- Explain any certifications or regulatory compliance that was required and how these benchmarks were met
- Mention any additional, unexpected benefits
- Describe next steps – how will this solution evolve or scale over time? How will maintenance and service be handled?

Paragraph 6 (Conclusion):

Tips:

- Explain how the solution met the demands of the challenge, and what results the client experiences now that the solution is in place
- If the client plans to continue working with you, mention any future plans

5. Additional Materials

Images

Tips:

- Include at least one image with a caption
- If additional images, CAD drawings, or process diagrams are available, include those as well.

Quote

Tips:

- Draft a quote for the client to approve
- Ideally, the quote would be from the decision-maker in your typical sales process, affirming that working with you was the right decision

CTA

Tips:

- Include a CTA that's a direct contact for your sales team
- If the case study will be in PDF format, include a link to your website

Layout

Tips:

- Consider laying your content out in a designed PDF – use your own corporate template or modify a free one from a low-barrier design tool like Canva

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