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How case studies can drive audience engagement



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Executive summary

Case studies are a powerful tool for engaging audiences, particularly in B2B marketing. They provide tangible proof of a product or service's value, using real-world examples to demonstrate impact. Case studies work by highlighting a challenge, presenting a solution, and showcasing results, with the customer's voice at the centre of the narrative.

In this guide, we explore the role of case studies in the marketing funnel, how they can be used beyond direct sales, and the formats that drive the most engagement. We also discuss common challenges, such as obtaining approvals and securing participation, and provide actionable tips to maximise impact.

This guide has been created from the insights shared by Paul Severn, Content Marketing Manager, B2B, at The Open University, at an Insights Media webinar on how the OU uses case studies to engage its B2B audiences.



The role of case studies in audience engagement

1.

Case studies as a trust-building tool

Customers are sceptical of sales claims, but they trust their peers. Case studies focus on the customer's experience, making them more relatable and credible than traditional marketing messages. They serve as social proof, reassuring potential buyers that others have successfully navigated the same challenges with the help of a given product or service.

"I think it's the voice of the customer that really matters in all of this. They tell the story because that's what other people like them want to hear," says Paul Severn. "

Severn says that the long-term nature of case study relationships helps build trust and demonstrate the OU's ongoing value to the customer over time. Trust, he says, is a critical element in effective case study development, whether through amplifying the customer's voice, uncovering meaningful insights, involving senior stakeholders, or nurturing long-term partnerships.

2.

Case studies as a marketing tool

In B2B marketing, purchasing decisions are rarely made impulsively. Case studies help move buyers along the buying journey.

Awareness stage

Case studies build brand recognition and demonstrate expertise

Consideration stage

Prospects who have downloaded reports or attended events need additional nudges - case studies show how others have benefited

Decision stage

When a potential buyer is evaluating options, a case study offers compelling evidence of successful outcomes.



3.

Beyond sales: other uses for case studies

While case studies are effective in sales, they also serve broader strategic goals:

Internal communication

Showcasing success stories boosts employee morale and aligns teams on impact.

Public affairs and sector engagement

Case studies can be used to demonstrate success to government bodies, industry regulators, and local politicians. “Local politicians might be interested in what’s happening in their area. So we can send them a case study and say, ‘You know this is happening in your local NHS Trust’. That could be quite powerful for public affairs,” says Severn.

Employer branding

Case studies can also be used to attract talent by showcasing who you work with, the type of work and the results. “Recruiting onto apprenticeship schemes can be a challenge. But if you’ve got a case study with somebody talking about how great their social work degree was, suddenly it’s a lot easier,” he adds.

Choosing the right case study format



Written case studies

Written case studies are versatile and SEO-friendly. They work well as standalone content or in combination with other formats.

When crafting a written case study:

Keep it structured: challenge → solution → results

Use direct quotes from customers

Include clear, quantifiable results where possible.



Video case studies

Video is engaging and helps humanise customer success stories. A well-produced video can be repurposed into shorter clips for social media, presentations, and emails.

Challenges with video:

Requires more time and budget

Needs buy-in from customers to appear on camera.



Thought leadership integration

Case studies can be embedded in industry reports, panel discussions, and white papers to add credibility to broader insights.

Severn says video case studies can also be used to create written case studies (from the transcripts). This written content is good for SEO and can be used in email campaigns.

Overcoming common case study challenges

1.

Securing customer participation

Getting customers to agree to a case study can be difficult. They may have concerns about confidentiality, workload, or company policies.

To encourage participation:

- Emphasise the mutual benefits (e.g., PR exposure, recruitment advantages, internal recognition)
- Offer different formats (e.g., anonymous case studies, written testimonials instead of video interviews)
- Work with account managers to gain customer buy-in.

2.

Navigating approvals

For large organisations, approvals can be slow, especially when corporate communications teams are involved. To streamline the process:

- Get buy-in from senior stakeholders early on in the process
- Keep the legal and communications teams informed from the start
- Provide a draft in advance for review.

3.

Checklist

Overcoming common challenges in creating case studies

Securing customer participation

- Highlight mutual benefits (PR exposure, recruitment support, internal recognition)
- Offer flexible formats (written, video, anonymous testimonials).
- Work with account managers to build trust and buy-in.

Navigating approvals

- Involve senior stakeholders early to champion the case study
- Inform legal and communications teams from the outset
- Provide a well-prepared draft for easy review and sign-off

Ensuring effective storytelling

- Focus on challenges, solutions, and measurable results
- Use authentic customer quotes to enhance credibility
- Avoid overly technical language; keep it engaging and accessible.

Maximising distribution and impact

- Repurpose case studies across blogs, emails, social media, and reports
- Integrate them into sales conversations and onboarding processes
- Track engagement metrics to refine and improve future case studies.



Key takeaways



Identify strong case study candidates

Look for customers with compelling stories and measurable results



Choose the right format

Balance budget, reach, and engagement potential when selecting written, video, or hybrid formats



Get customer buy-in early

Present the benefits to their organisation and ensure alignment with internal stakeholders



Integrate across marketing channels

Repurpose case study content for blogs, social media, email campaigns, and reports



Track performance

Use analytics to understand engagement and refine future case study strategies.



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