

Case Study Framework | Heavybit Inc.

If you would like to edit this document for your own product or business, go to File > Make a copy, then choose where in your own Google Drive you would like to save this template.

This is a simple case study framework for creating clear, straightforward B2B case studies. For more information on how to use this template, [read this blog post on crafting your first B2B case study.](#)

I. Executive Summary	
Executive Summary <i>1-2 sentence summary of how the customer uses your product and the results they've seen</i>	
Pull Quote <i>A concise, compelling quote from the selection below</i>	
Proof Points <i>3 metrics-focused bullet points highlighting ROI</i>	
II. The Problem	
The Problem <i>A brief description of the space the customer is in, and their key concerns for the area that you can help in. Focus on what the status quo was before and how it was flawed.</i>	
Optional Quote <i>Quote what the breaking point was. (Bonus points for including something about the business impact of the old status quo)</i>	
III. The Solution	
The Solution <i>Describe how your product uniquely solves the problem, how it fits into the larger</i>	

<p><i>workflow of the team, and how it was implemented.</i></p>	
<p>Quote</p> <p><i>Quote on the immediate impact on the team's workflow/workload/etc</i></p>	
<p>Quote</p> <p><i>Quote on measurable benefits of the product</i></p>	
<p>IV. The Results</p>	
<p>The Results</p> <p><i>How your product has impacted high-level business success for the customer, including time saved, money saved, other projects the team can work on, team happiness, etc.</i></p>	
<p>Quote</p> <p><i>Quote on how the solution has impacted the team longer term</i></p>	
<p>Quote</p> <p><i>Quote on how the future looks better because of your solution</i></p>	