

How To Create a Great Case Study

Getting powerful testimonials and case studies from your clients doesn't have to be complicated or time-consuming. In fact, some of my best testimonials have come from quick 60-90 second videos recorded right after providing value to a client or prospect. This checklist walks you through my simple but effective process for capturing authentic testimonials that tell a compelling story. Whether you're working with long-term clients or someone you just impressed in a strategy session, this framework will help you showcase real results while making your clients the star of the show. The best part? You can get amazing testimonials in under two minutes that follow the perfect story arc: who they are, where they were, what the journey looked like, and where they are now.

Preparation

- ☐ Identify clients who have had positive experiences with your services
- ☐ Approach after providing significant value (e.g., after a helpful strategy session)
- ☐ Ask permission to record a quick 60-90 second video testimonial
- ☐ Schedule the recording session (can be done immediately after a call when they're already praising your work)

Technical Setup

- ☐ Use a video conferencing tool like Zoom
- ☐ Make sure to "spotlight" the client so only they appear on camera
- ☐ Test audio and video quality before recording
- ☐ Prepare to record the session
- ☐ Have prompting notes ready for each question

The 3-Part Interview Structure

Part 1: Introduction

- ☐ Ask the client to introduce themselves:
 - Their name
 - Their company name
 - What they do/their role

Part 2: Before & Process

- ☐ Ask about their situation before working with you:
 - What challenges were they facing?

- What wasn't working?
 - What prompted them to seek help?
- [] Prompt specific details if needed (e.g., "You mentioned struggling with X...")
- [] Ask about the process of working with you:
 - What specific solutions did you implement together?
 - What was the experience like?
 - Prompt about specific aspects of your service you want highlighted

Part 3: Results & Current Situation

- [] Ask about their current situation after implementing your solutions:
 - What specific results have they seen?
 - What measurable improvements occurred? (time saved, revenue increased, etc.)
 - How has their situation improved?
- [] Prompt for concrete examples if needed

Post-Recording

- [] Thank the client for their time
- [] Let them know how you'll be using the testimonial
- [] Offer to send them the final edited version
- [] Consider sending a small thank you gift

Editing Tips

- [] Keep the final video concise (60-90 seconds)
- [] Edit out any unnecessary pauses or repetition
- [] Consider adding text overlays for key statistics or results
- [] Add your branding at the beginning and end

Compliance Considerations

- [] Be mindful of FTC guidelines on testimonials
- [] Ensure claims made are truthful and not misleading

Remember: The most compelling testimonials follow the simple structure of "Who they are → Where they were → What the process was like → Where they are now"

Closing Thoughts

There you have it! A simple but powerful system for capturing authentic testimonials that will help you build credibility and convert more prospects into clients. What I love about this approach is that it's quick (60-90 seconds), it's easy for your clients to do, and it creates compelling stories that showcase real results. The

beauty of this process is in its simplicity - you're just guiding your happy clients to share their journey in a structured way. When you make them the star and highlight their transformation, you end up with testimonials that connect emotionally with prospects and demonstrate your value without coming across as salesy or pushy. So next time a client is raving about how awesome and helpful you've been, grab this checklist, hit record, and capture that magic while it's fresh. Your future prospects (and your business) will thank you!