BEYOND
THE CASE STUDY

# Nine Best Practices for Inviting and Persuading Customers to Share Their Story

## If you're like many B2B solution and service providers, you're struggling to persuade your customers to go on the record and share their story.

They give you a variety of reasons for turning down a story opportunity. Reasons like:

- They haven't fully implemented your solution or services yet
- They want to first get the kinks out and prove the benefits
- They don't have the time because they're focusing on other more important priorities

While these might all seem like legitimate reasons, I  believe the underlying reason why they say “no” is because they simply don’t see the value.

They’ve seen loads of case studies out there and they’ve probably participated in a few themselves. And they view case studies as a self-serving piece that mainly promotes the interests of the solution provider.

So I set out to fix this problem when I developed Beyond the Case Study, my story playbook. It includes, among other things, best practices for inviting and persuading customers to say “yes” to sharing their story.

And they work!

## CASE IN POINT

The last client I worked with asked four customers to share their stories -  and all four said “yes”.

ALL FOUR!

What’s more, the VP of Marketing who sent the email invitations had no prior relationship with the customers. She was introducing herself customers for the first time.

Now, I can’t guarantee that you will get a 100% “yes” rate if you use these best practices. But I am super confident that if your customers are happy, you’re going to see a dramatic up-tick in the number that say “count me in!”.

Try them out for your yourself and let me know how it goes.

BEST PRACTICES

# To Go from “No” to “Yes”

1. **Get the Right Person to Send the Invitation**

   Ask someone with the closest relationship to the customer or who has the greatest influence and connection with other influencers at the company to send the invitation. EXAMPLE: Account manager, customer success manager, CEO, CXO, etc.

2. **Personalize the Introduction for the Interviewee and Company**

   Open the email with a personal note and something specific about the interviewee and customer so that the invitation doesn't sound generic and they see that you're aware of their specific goals, needs and accomplishments.

3. **Share the Story Goal and What's In It For Them**

   Let the customer know the angle of the story you want to capture. Share the objective of the specific storyline chosen for the customer and what value they will get from sharing their story.

4. **Differentiate Your Customer Stories From Typical Case Studies**

   Tell the customer that you are not are not creating a typical case study or looking for an endorsement. You are looking to have a discussion with them in order to capture their candid thoughts, experience, lessons learned and advice.

5. **Share the Top Interview Questions You Will Ask**

   Give the customer an idea of the types of questions you will be asking them during the interview so they see that the focus is on them and not on you, as the solution provider.

6. **Show an Example of the Story**

   Include a link to a sample story so they can see how different your approach to stories is compared to a typical case study, and how their authentic voice will be captured. Here is an example.

7. **Share Which Customers Have Said “Yes”**

   If you are doing a thought leadership series and are interviewing multiple customers, include the names of companies that have agreed to participate in a story to motivate them to want to be featured along with their peers.

8. **Be Friendly, Natural and Conversational**

   When tailoring the invitation make sure to use language that is friendly, natural and conversational so that it sounds like you are speaking with a business colleague or peer.

9.. **Ask for 30 to 45 Minutes of Their Time**

   Request 30 minutes of their time to do the interview for a thought leadership story and 45 minutes of their time for a customer journey story. When they agree to do the story, you can always add 15 minutes when sending the meeting invitation and explain that you are adding the extra time in case it’s needed.