

open strategy partners



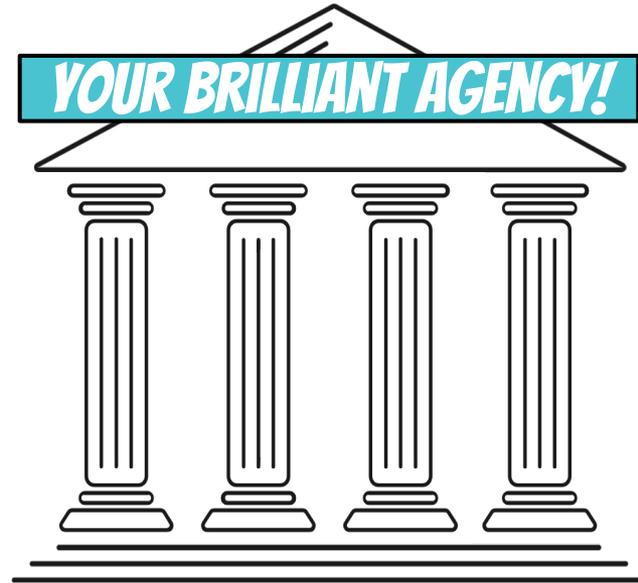
Your (Agency) House

*A Communications Playbook
to Grow your Agency, Product,
or Service Business*

*Jeffrey A. "jam" McGuire // @horncologne
Tracy Evans // @kanadiankicks*

Open Strategy Partners GmbH
@open_strategy
Sep 2022

*An actionable, straightforward model
for selling better
by building trust with your prospects
before they ever meet you.*





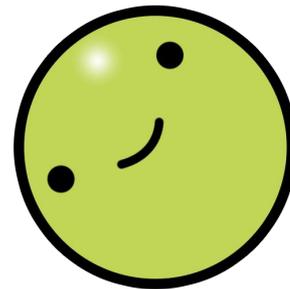
Open Strategy Partners

Strategize, Plan, Do, Enable

@open_strategy

<https://openstrategypartners.com>

Meet the OSPeas!



Tracy Evans
Partner
Cologne, Germany

@kanadiankicks



Jeffrey A. "jam" McGuire
Partner
Cologne, Germany

@horncologne

Meet the OSPeas!



Christine Buehler
Communication Consultant
San Francisco,
United States



John Heaven
Client Engagement Lead
Hamburg, Germany



Andrew Johnston
Communications Consultant
Ontario, Canada



Tracy Evans
Partner
Cologne, Germany



Carl Richards
Media Producer
Ontario, Canada



Felicity Brand
Communication Consultant
Melbourne, Australia



Christoph Berger
Communication Consultant
Munich, Germany



Jesi Driessen
Ops & PM Lead
Cologne, Germany



Jeffrey A. "jam" McGuire
Partner
Cologne, Germany



Outline

- *Make your website your best sales tool.*
- *Are you my agency?*
- *Help yourself. Help your prospects.*
- *Build your agency house.*
- *Some content models*
- *Keeping things simple*



Make your website
your best sales tool.

Improve Sales Flow

Increase Awareness of your Expert Brand

Improve Search Results

Connect with your Audience

*An actionable, straightforward model
for selling better
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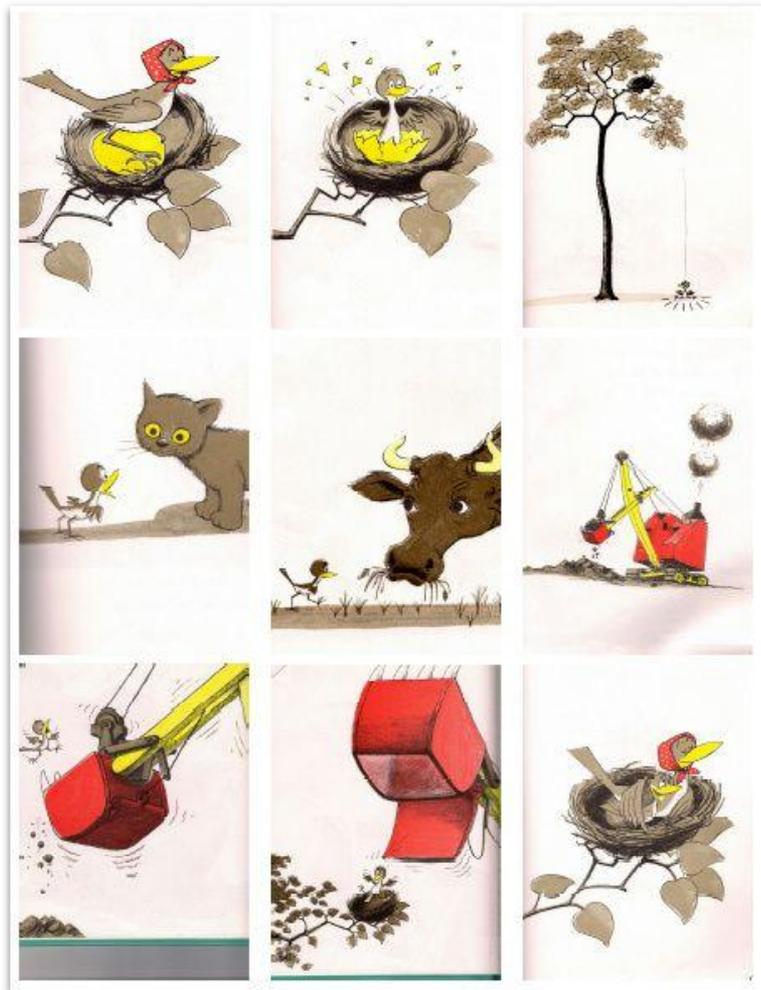
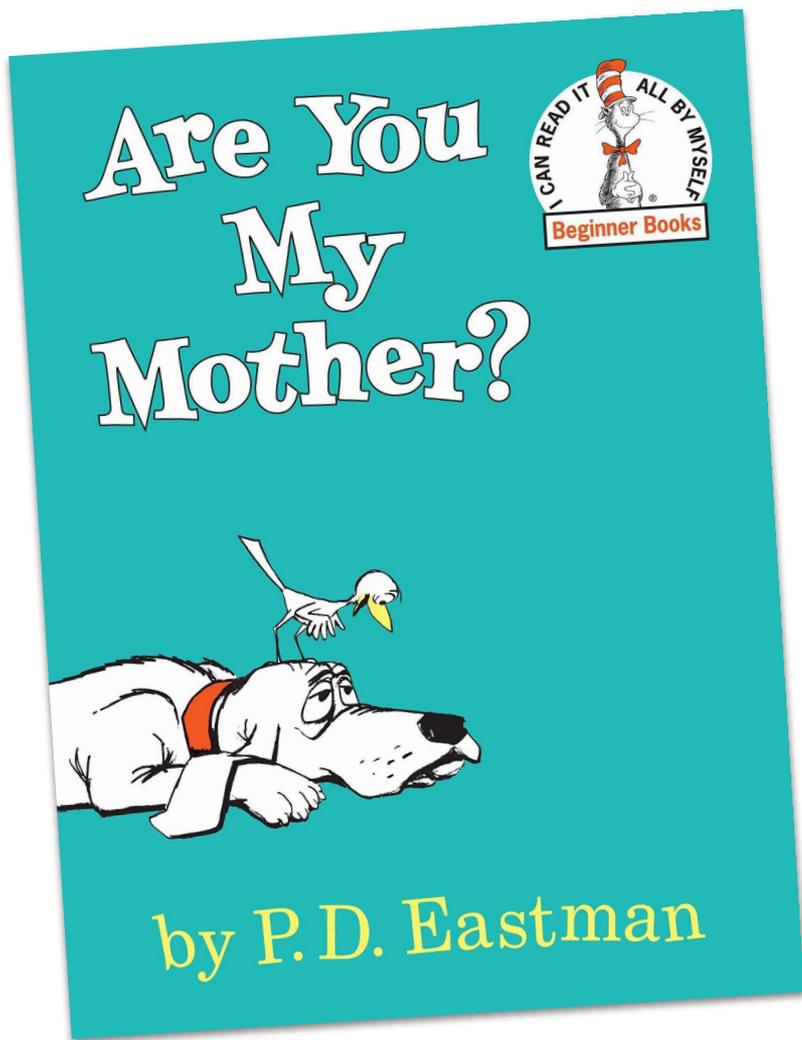
ARE YOU MY AGENCY?

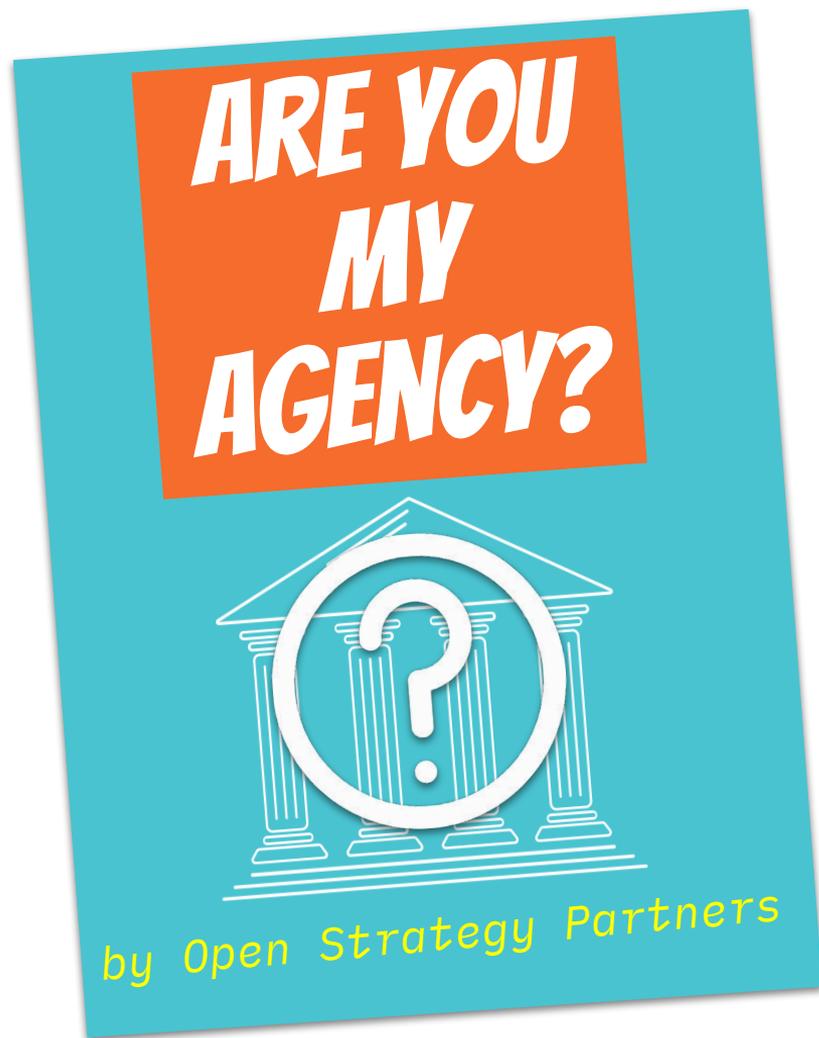


by Open Strategy Partners

*An actionable, straightforward model
for selling better
by building trust with your prospects
before they ever meet you.*







What do you do? ... Do I need that?	Do you understand my business?	Do you have experience?
Who are you?	How do you work?	What tools do you use?
What are your qualifications and expertise?	What's it like working with you?	Whom have you helped transform and succeed?

ARE YOU MY AGENCY?

*“We build and sell **SERVICES**,
as a **TEAM OF EXPERTS**,
SHARING our **KNOWLEDGE**,
qualified & experienced
in using a set of
TOOLS and **PROCESSES**,
with a **PROVEN TRACK RECORD**
OF SUCCESS.”*

“What do you do? ... Do I need that?”

“Do you understand me? And my business?”

“Do you have experience?”

“Who are you?”

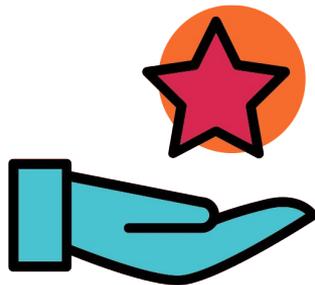
“How do you work?”

“What tools do you use?”

“What are your qualifications & expertise?”

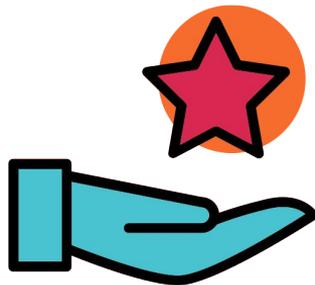
“What’s it like working with you?”

“Whom have you helped transform & succeed?”



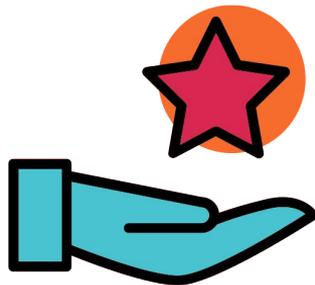
- 1) Help yourself
- 2) Help your prospects

This is a process.
Every improvement counts.



1) Help yourself

- *What do you have to type out every time?*
- *What questions do you always get?*
- *Why do people come to you now?*
- *Why would you want people to come to you?*
- *What about the current buzzwords?*



2) Help your prospects

- *Understanding your current situation*
- *What does every prospect ask?*
- *Why do you win deals?*
- *Why do you lose deals?*
- *Who/what do you see all the time when you are pitching?*
- *When and why do people come to you?*
 - *Asking for Drupal?*
 - *And the other things you offer?*



Build your agency house, grow your business.

Trust Signals

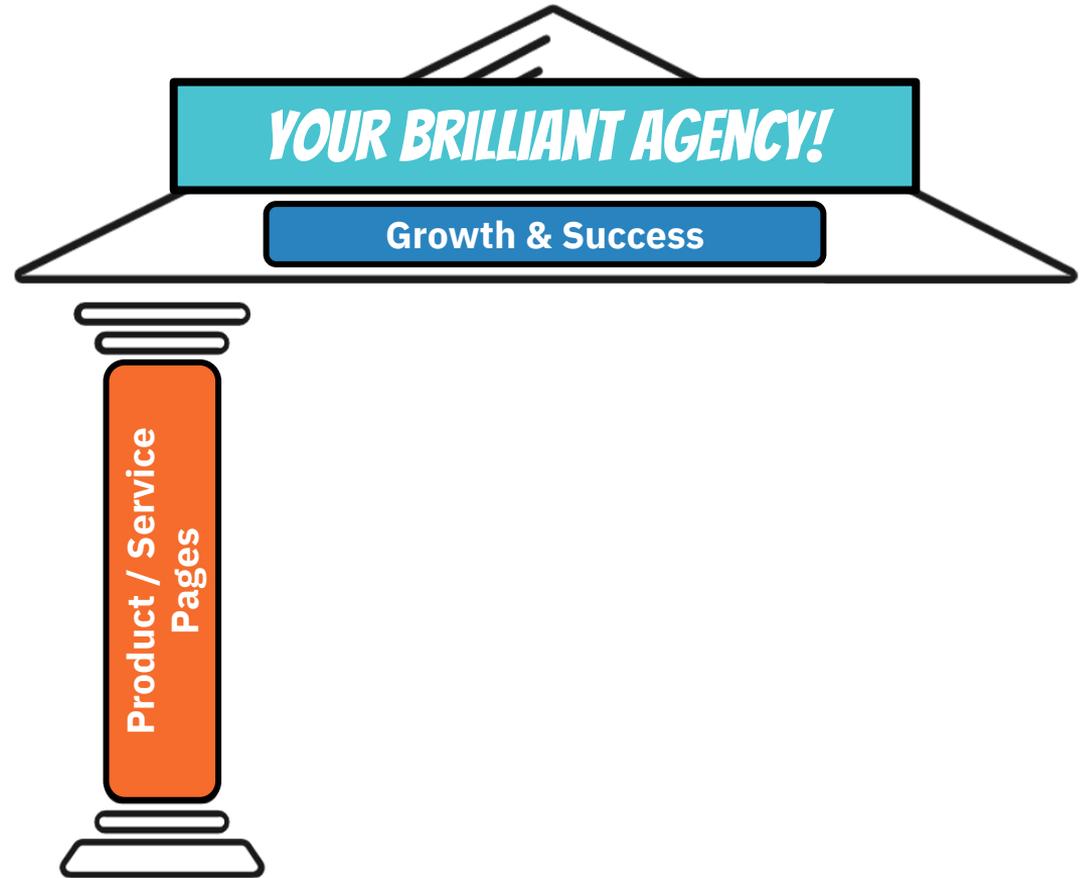
Your House



What do you sell?

What do you do? What do you build?

- What are the offerings?
- WiiFM? Who is it for?



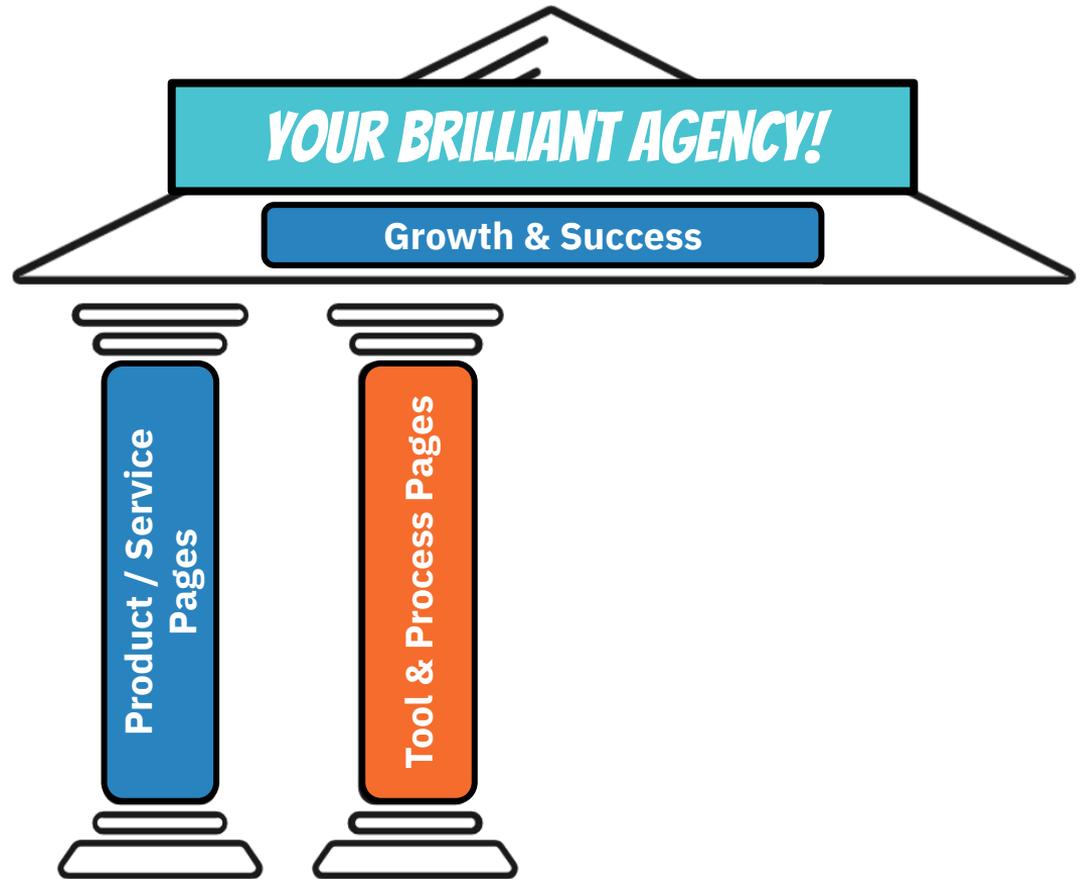
How do you build it?

What do you do? What do you build?

- What are the offerings?
- WIIFM? Who is it for?

How do you build it?

- What tools and processes do you use?



What do you know?

What do you do? What do you build?

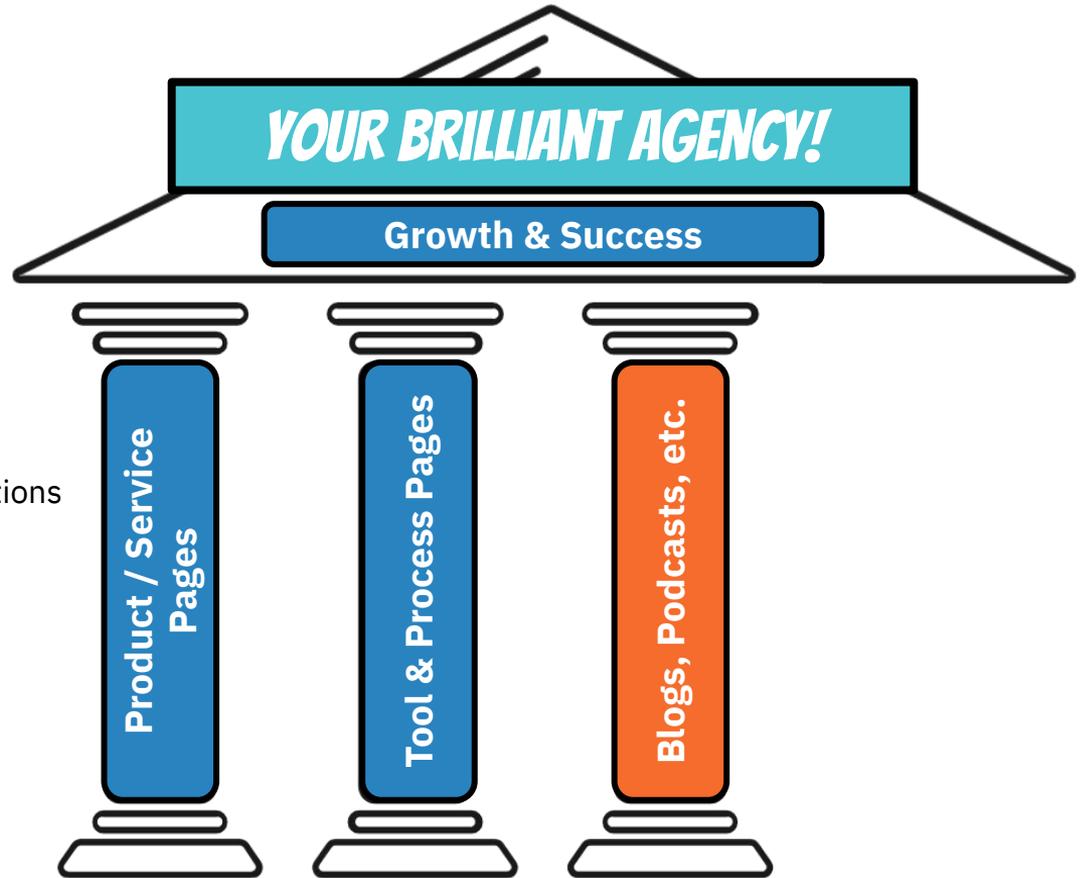
- What are the offerings?
- WIIFM? Who is it for?

How do you build it?

- What tools and processes do you use?

What do you know?

- Documentation, blogs, presentations, certifications
- Expertise, authority



Who builds it all?

What do you do? What do you build?

- What are the offerings?
- WIIFM? Who is it for?

How do you build it?

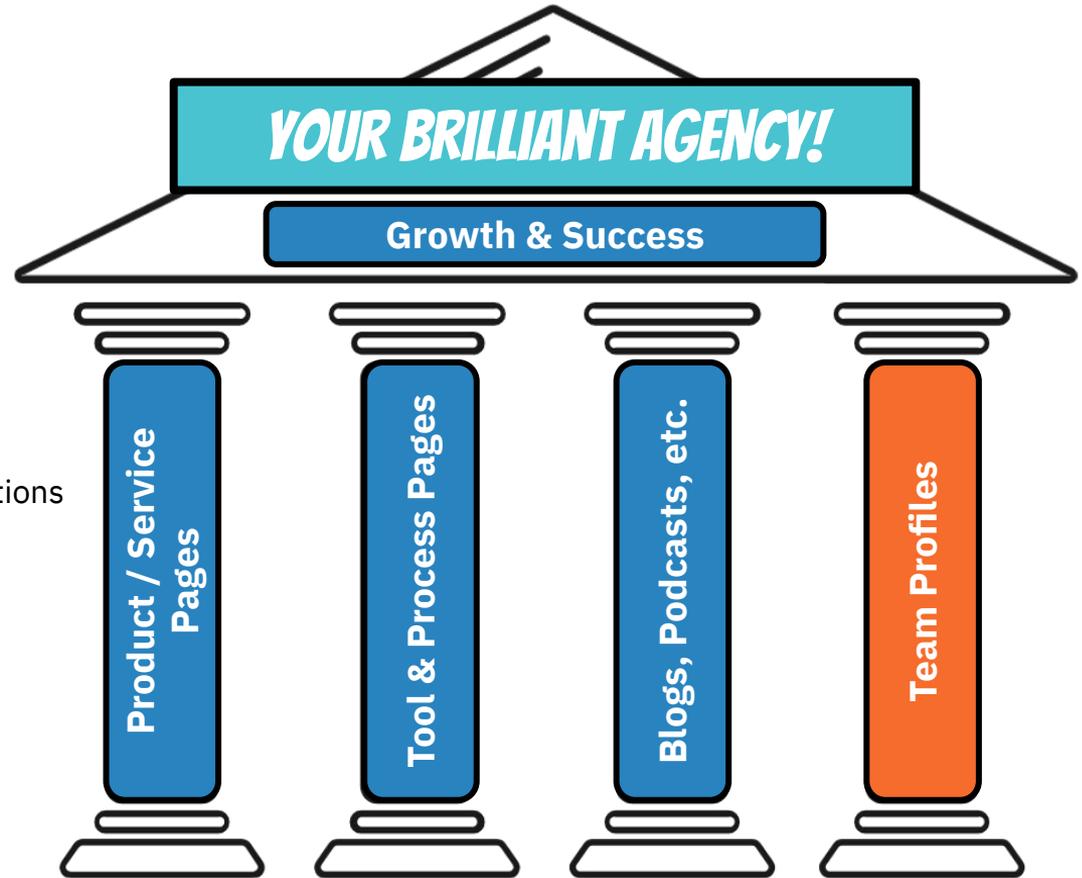
- What tools and processes do you use?

What do you know?

- Documentation, blogs, presentations, certifications
- Expertise, authority

Who builds it all?

- Team Profiles, 1-pagers



The Foundation

What do you do? What do you build?

- What are the offerings?
- WIIFM? Who is it for?

How do you build it?

- What tools and processes do you use?

What do you know?

- Documentation, blogs, presentations, certifications
- Expertise, authority

Who builds it all?

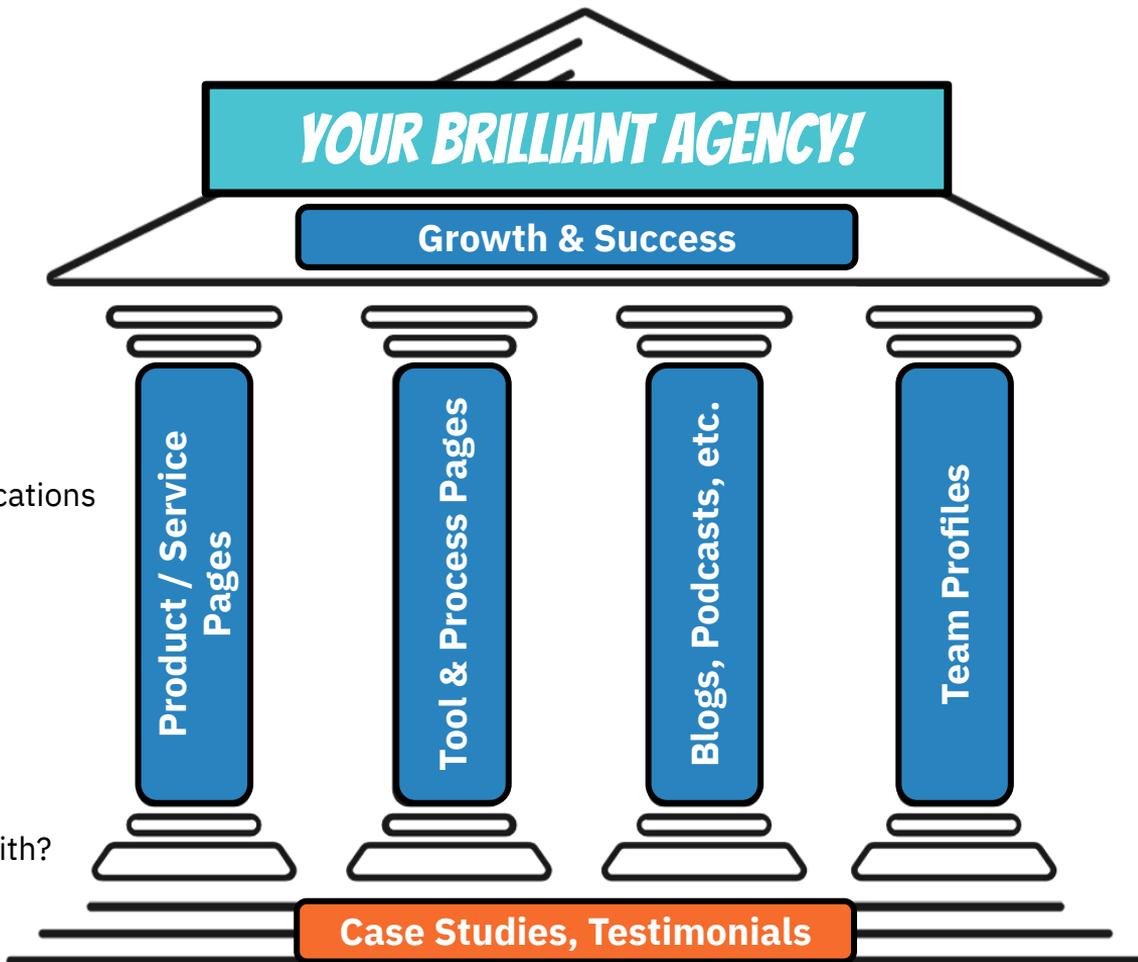
- Team Profiles, 1-pagers

Proof of Success: Case studies, testimonials

- What are **your clients'** successes?

Peer proof: Who else have you helped?

Service Proof: What is your team like to work with?





Never build a pitch deck again!

Make your website your best sales tool

Page Brief: Your pitch

1. Who we are (brand positioning):

- We connect engineering with marketing to align your communications with your vision, strategy, and technical truth.

2. What we do (Services + Value Map)

- Strategize, Plan, Do, Enable

3. Who we work with

- high-value technology organizations communicate effectively — product companies, agencies, open source projects

4. Challenges we help solve

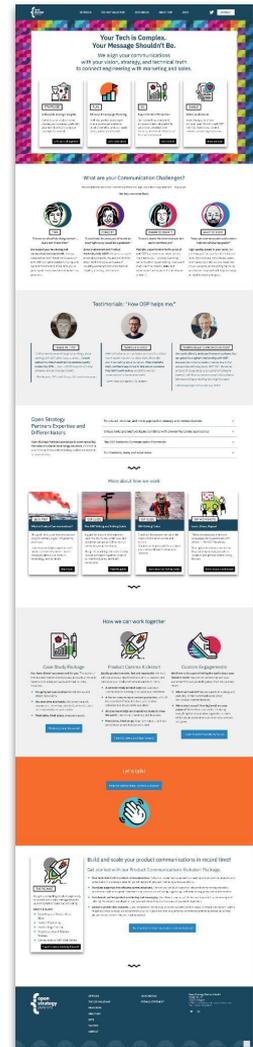
- Limited time, limited resources, cognitive load for other things

5. Why work with us (direct benefits/outcomes + showcasing expertise)

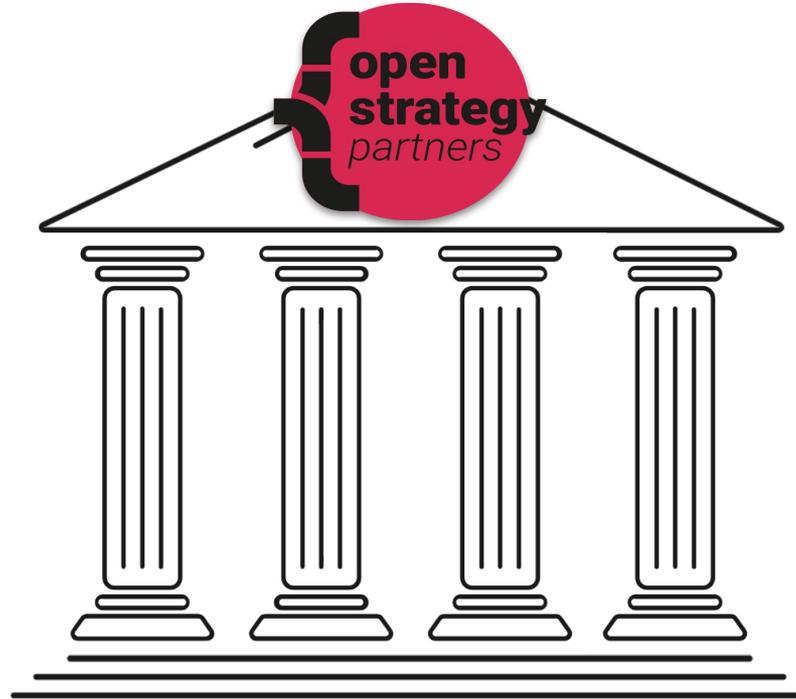
- Expand your marketing and communications bandwidth.
- Get sales enablement and product marketing help fast.
- Get the most out of your technical teams without too much of their time.
- Turn your product information into consistent sales, content, and strategic assets faster with our structured approach.

6. How you can work with us

- Product Communications Kickstart Package
- Case Study Kickstart Package
- Custom Engagement



The Front Door: No more pitch deck



Client Challenges (We understand you.)



What are your Communication Challenges?

We consistently see a few common patterns in high-value tech organizations – like yours.

We help overcome them.



TIME

"I know we should be doing content ... but I don't have time."

We expand your marketing and communications bandwidth. Are you strapped for time? Need more capacity? With OSP, you get consistent, high-quality content for a fraction of the time you or your expert teams would need to do it on your own.



CAPACITY

"I need help! An extra pair of hands (or two!) right away would be a godsend."

Sales Enablement and Product Marketing help ASAP. We are also rapid-onboarding experts. You get the benefits of our methodologies and years of industry experience fast in the form of insights, planning, and content.



WHERE TO INVEST?

"I need a whole MarComms team, but we're not there yet."

Multiple, expert brains for the price of one! OSP can meet your needs across many functions – strategy, planning, content authoring and editing, media and more. All of our brains, skills, and experiences for the price of a headcount or two :-)



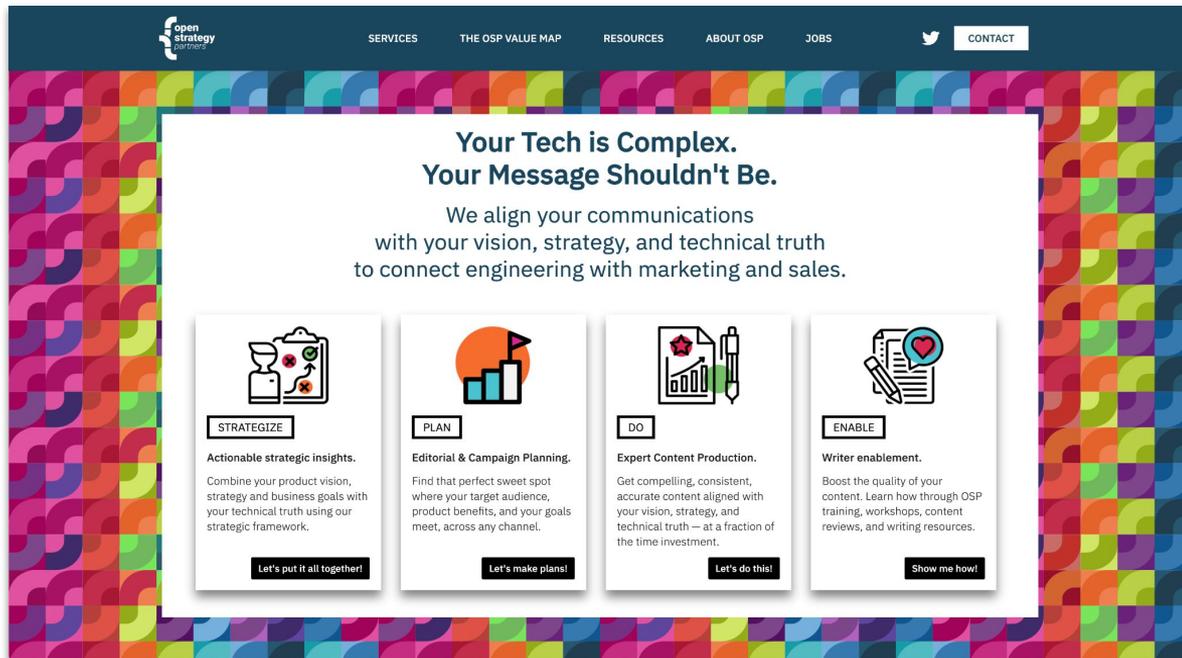
WHAT DO I SAY?

"How can communication and content help me achieve my goals?"

High-quality assets in your voice. We can help you find your brand's voice and tone, then produce the strategic, sales, and marketing materials you need. Our structured product marketing and sales enablement approach will help you keep on track to meet your goals.

There's a company for that!

- (Value Proposition)
- (Target Clients)



The screenshot shows the Open Strategy Partners website homepage. The header is dark blue with the company logo on the left and navigation links (SERVICES, THE OSP VALUE MAP, RESOURCES, ABOUT OSP, JOBS, CONTACT) on the right. The main content area has a white background with a colorful, patterned border. The headline reads "Your Tech is Complex. Your Message Shouldn't Be." followed by the sub-headline "We align your communications with your vision, strategy, and technical truth to connect engineering with marketing and sales." Below this are four service cards, each with an icon, a title, a description, and a call-to-action button.

STRATEGIZE
Actionable strategic insights.
Combine your product vision, strategy and business goals with your technical truth using our strategic framework.
[Let's put it all together!](#)

PLAN
Editorial & Campaign Planning.
Find that perfect sweet spot where your target audience, product benefits, and your goals meet, across any channel.
[Let's make plans!](#)

DO
Expert Content Production.
Get compelling, consistent, accurate content aligned with your vision, strategy, and technical truth – at a fraction of the time investment.
[Let's do this!](#)

ENABLE
Writer enablement.
Boost the quality of your content. Learn how through OSP training, workshops, content reviews, and writing resources.
[Show me how!](#)

Challenges (again, with our answers)

What are your Communication Challenges?

We consistently see a few common patterns in high-value tech organizations — like yours.

We help overcome them.



TIME

"I know we should be doing content ... but I don't have time."

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High-quality assets in your voice. We can help you find your brand's voice and tone, then produce the strategic, sales, and marketing materials you need. Our structured product marketing and sales enablement approach will help you keep on track to meet your goals.

Testimonials (it works!)

Testimonials: "How OSP helps me."



"SAVES ME TIME"

*I still remember one of the greatest things about working with OSP while I was a client ... **I could reduce my time investment to produce quality content by 90%** ... from ~10-15 hours to a 1-hour interview and 30 minutes of edits.*

– Rick Manelius, PhD, web3 Startup CXO, serial entrepreneur



"GIVES US A VOICE"

*OSP took what we are and what we stand for and put that in words that we can share with others. We didn't like talking about ourselves. **They created a bold, confident way for us to talk about ourselves that didn't exist before**, an identity we can communicate to the outside world.*

– Benni Mack, b13 agency CTO, Stuttgart



"DRIVES RESULTS AND RECOGNITION"

***We could afford a dedicated internal marketer, but we opted for a tighter relationship with OSP** because the money is better invested due to the whole organizational power. With OSP, the whole process of recognizing us as a product company started. Until then, we were a bunch of developers who were doing something that might be cool.*

– Bernd Hepberger, Co-Founder Sulu GmbH

Why us? (our expertise and differentiators)

Open Strategy Partners Expertise and Differentiators

Open Strategy Partners specializes in communicating the value of complex technology solutions, connecting you to the business and technology audiences essential for your success.

Structured, modular, and moral approach to strategy and communications

Unique tools and methodologies combined with proven Marcomms approaches

The OSP Authentic Communication Framework

Our founders, team, and experience.



More about how we work



BLOG POST

What is Product Communications?

This post introduces how we produce copy for landing pages, infographics, and more.

Learn how we help companies craft product communications – micro-



OSP GUIDE

The OSP Writing and Editing Guide

A guide for anyone who wants to learn the structures, workflows, and processes we use at OSP to help us communicate authentically.

The guide is a living reference to help



OSP GUIDE

OSP Editing Codes

Check out the system we use to be more collaborative writers and editors.

Because editing shouldn't be a black box, and we all want to learn and improve!



OSP WORKSHOPS

Learn, Share, Repeat

"We enthusiastically share our knowledge and experiences with others." - The OSP Manifesto

Sharing our best ideas means that they can help as many people as



Let's get started!

How we can work together



Case Study Package

Your best clients' successes sell for you. The stories of their transformations thanks to your products or services become your evergreen sales and trust-building resources.

- **You get great case studies** that tell stories and attract new clients.
- **You save time and hassle.** We cover research, preparation, interviews, and draft, write, edit, and polish (whew!) your case studies.
- **Fixed price, fixed scope,** evergreen assets.

I'll dip my toe in the water!



Product Comms Kickstart

Quality product content, fast and repeatable. We work with you and your stakeholders to de-silo, capture, and centralize your product information and turn it into:

- **A website-ready product page** and a product communication strategy to support your next steps
- **A fast on-ramp to more content production,** with all the essential information about your product collected and structured in one place
- **All your knowledge and experience ready to show the world** — technical, marketing, and business.
- **Fixed price, fixed scope,** long-term value ... and you get to know us and how we work, too!

I want to take a bold step forward!



Custom Engagements

We'd love to be a part of telling the world about your fantastic work! How are you connecting with your audience? How are you telling about how you can help them?

- **What can I ask for?** We are experts in strategy and planning, content and media production, and product communications.
- **What about scope? How big/small are your projects?** We've been successful in helping everything from the smallest agencies to multi-billion dollar corporations communicate, connect, and grow.

I want to sprint towards my future!



Why our home page?

[HOME](#)
[THE OSP VALUE MAP](#)
[RESOURCES](#)
[ABOUT OSP](#)
[JOB](#)

[Twitter](#)
[LinkedIn](#)

Your Tech is Complex. Your Message Shouldn't Be.

We align your communications with your vision, strategy, and technical truth to connect engineering with marketing and sales.

STRATEGIZE

Articulate strategic insights. Connect your product, your strategy, your business goals with your target audience. Create a message that works.

[Learn More](#)

PLAN

Refined & Campaign Planning. Find the perfect way to get your message across. Select the right channels, content, and timing. Execute your plan.

[Learn More](#)

DO

Expert Content Production. Our compelling content, accurate content aligned to your audience, will ensure your message is heard.

[Learn More](#)

EVALUATE

Web evaluation. Measure the impact of your content. Track backlink, SEO, analytics, conversions, and more. Report on your progress.

[Learn More](#)

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[THE OSP VALUE MAP](#)
[RESOURCES](#)
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[Twitter](#)
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Why our home page?

[Learn More](#)

Case Study Package

What's a Product Communications?

It's the product you're promoting and the way you're promoting it. It's the product, the story, the content, the audience.

Our Product Communications team works closely with you to create a strategy, content, and execution plan that connects your product, your audience, and your message.

[Learn More](#)

Product Comms Kickstart

The OSP Kickstart and 90-Day Strategy

At OSP, we ensure clients have the right content, content plan, and execution plan. Our Product Comms Kickstart is a 90-day strategy, content, and execution plan that connects your product, your audience, and your message.

[Learn More](#)

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[Learn More](#)

How we can work together

Case Study Package

You've done it before. You've done it right. You've done it well. You've done it right. You've done it well. You've done it right. You've done it well.

[Learn More](#)

Product Comms Kickstart

Quality product content. Fast and repeatable. Our team will create your product content, content plan, and execution plan. Our Product Comms Kickstart is a 90-day strategy, content, and execution plan that connects your product, your audience, and your message.

[Learn More](#)

Custom Engagements

We'll take care of you. We'll take care of you.

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Why our home page?

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Build and scale your product communications in record time!

Get started with our Product Communications Kickstart Package.

- Your technical truth is product communications. Follow us on LinkedIn and we'll help you get started with our product communications in record time.
- Product Comms Kickstart is a 90-day strategy, content, and execution plan that connects your product, your audience, and your message.
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Why our home page?

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What are your Communication Challenges?

[Learn More](#)

TIME

"I have an idea for a new product, but I don't have time to create content for it."

[Learn More](#)

CONTENT

"I need help developing content for my product, but I don't have the resources to do it myself."

[Learn More](#)

MESSAGE

"I need help developing content for my product, but I don't have the resources to do it myself."

[Learn More](#)

WHAT DO I WANT?

"I need help developing content for my product, but I don't have the resources to do it myself."

[Learn More](#)

Testimonials: "How OSP helps me."

Casey M. P.

"OSP helped me with my product communications. They were able to help me with my product communications. They were able to help me with my product communications. They were able to help me with my product communications."

Nancy A. S.

"OSP helped me with my product communications. They were able to help me with my product communications. They were able to help me with my product communications. They were able to help me with my product communications."

Thomas R. B.

"OSP helped me with my product communications. They were able to help me with my product communications. They were able to help me with my product communications. They were able to help me with my product communications."

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[Learn More](#)



Some Content Models

How we put it together

- Value Case
- Blogs: The Content Brief
- Case studies

The Value Case

“TYPO3’s digital asset management (DAM) integrations make it easy for content authors to discover, access, and reuse media-rich content. Enterprise organizations invest in thousands of digital assets, but they go to waste without DAM capabilities integrated into your publishing workflow. Integrate TYPO3 with a DAM system to classify, store and maintain images, videos, and brand identity assets; with secured access for auditing and distribution.”

- Benefit
- Pain Point
- Solution

The target persona*

“Leadership Leonie” is a C-level executive responsible for

- The overall success of the business
- Developers and IT
- Marketing

* Take her perspective into account for self-service sales qualification. Assume this counts for her, her employees, and AND when pitching/selling to her as an agency.

Anatomy of a Value Case

“TYPO3’s digital asset management (DAM) integrations make it easy for content authors to discover, access, and reuse media-rich content. Enterprise organizations invest in thousands of digital assets, but they go to waste without DAM capabilities integrated into your publishing workflow. Integrate TYPO3 with a DAM system to classify, store and maintain images, videos, and brand identity assets; with secure access for auditing and distribution.”

- Benefit
- Challenge
- Solution

Anatomy of a Benefit Statement

- TYPO3's digital asset management (DAM) integrations make it easy for content authors to discover, access, and reuse media-rich content.
- "What's in it for me?"
- "[Our offering]"
 - gives you ...
 - helps you ...
 - lets you ...
 - enables ...

Anatomy of a Challenge

- Enterprise organizations invest in thousands of digital assets, but they go to waste without DAM capabilities integrated into your publishing workflow.
- “This makes my day worse.”
- “This keeps me awake at night.”
- “This costs my company time and money.”

Anatomy of a Solution Statement

- Integrate TYPO3 with a DAM system to classify, store and maintain images, videos, and brand identity assets; with secured access for auditing and distribution.
- “How [our offering]
 - solves the problem
 - alleviates the pain
 - delivers the solution

Example Value Case



EN | DE 

Centralized Information Management

We build customized centralized information management solutions (CIMs) as flexible hubs, connecting and integrating your existing systems with efficiency and ease of use in mind.

Out-of-the-box, one-size-fits-all behemoths may offer many features, but at the cost of speed, efficiency, and flexibility. You might be buying more limitations than benefits in the end.



Our secure, efficient, and easy-to-use information management hubs are tailored to your needs today and are ready to handle your changing requirements in the future.

Learn more about how to build a CIM hub that is ready to grow with you

[Contact Us](#)

Example Value Case

Stay Connected

Very fast, very reliable websites create great experiences for your customers, leading to superior conversion rates for your business everywhere in the world.

One price of success—measured, for example, in skyrocketing visitor counts—is increased demands on your technical infrastructure. Will it continue to deliver when it's put to the test?

At b13, we choose proven, reliable systems and software, we stress-test your infrastructure before launch to ensure it can deal with demand, and distribute the traffic load globally for maximum reach and performance.



Increase conversions and visitor retention

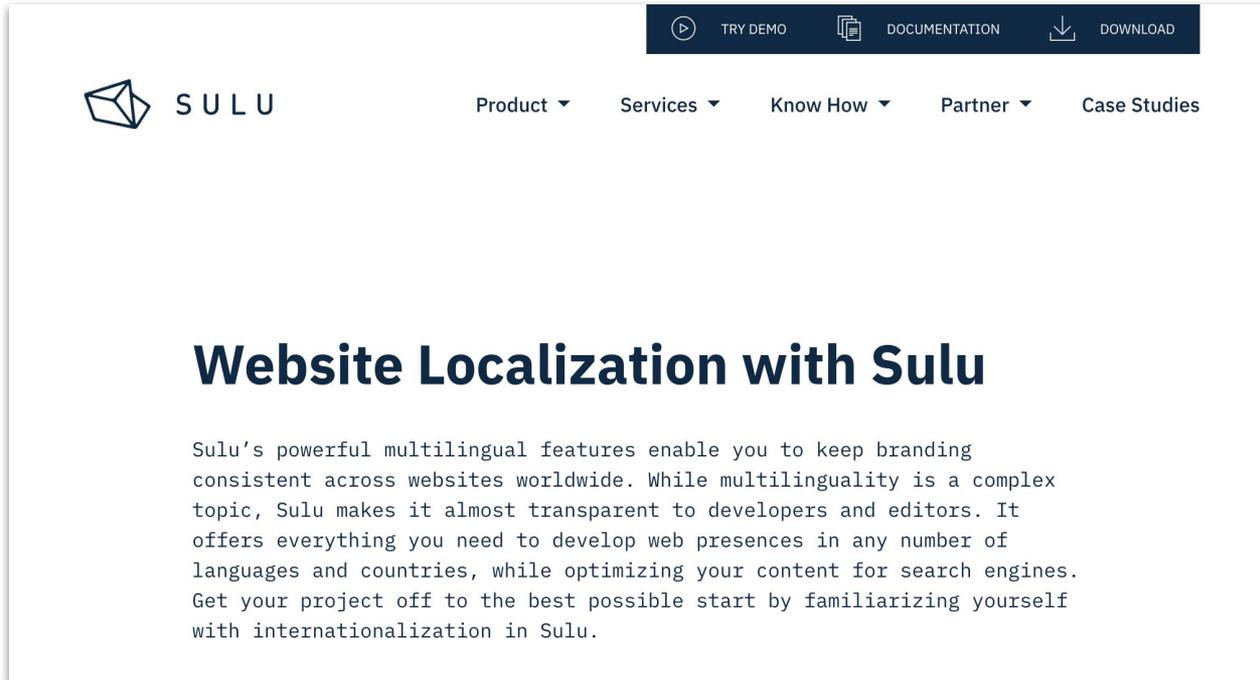


Fast web pages everywhere your customers are



Reliable choices made by an experienced partner

Example Value Case

A screenshot of the Sulu website's header and main content area. The header includes a dark navigation bar with "TRY DEMO", "DOCUMENTATION", and "DOWNLOAD" links. Below it is a white navigation bar with the Sulu logo and menu items: "Product", "Services", "Know How", "Partner", and "Case Studies". The main content area features a large heading "Website Localization with Sulu" and a paragraph of text describing Sulu's multilingual capabilities.

 **S U L U**

[Product](#) ▾ [Services](#) ▾ [Know How](#) ▾ [Partner](#) ▾ [Case Studies](#)

Website Localization with Sulu

Sulu's powerful multilingual features enable you to keep branding consistent across websites worldwide. While multilinguality is a complex topic, Sulu makes it almost transparent to developers and editors. It offers everything you need to develop web presences in any number of languages and countries, while optimizing your content for search engines. Get your project off to the best possible start by familiarizing yourself with internationalization in Sulu.

The Content Brief

Publish title: [***]

Byline: [***]

Thesis: [Main idea. What the content is about. Direct message.]

Brand Message: [Indirect message. What we want the reader to take away about the brand.]

Target Audience(s): [***]

SEO Target Keywords: [***]

Audience pain points and challenges: [***]

Business Goals:

- **Awareness**
- **Conversion** (define in CTA!)
- **Monetization** (for company/brand/org or specific product/service)

CTA(s)/CTV(s): [***]

Publish title: [***]

Byline: [***]

Thesis: [Main idea. What the content is about. Direct message.]

Brand Message: [Indirect message. What we want the reader to take away about the brand.]

Target Audience(s): [***]

SEO Target Keywords: [***]

Audience pain points and challenges: [***]

Business Goals:

- **Awareness**
- **Conversion** (define in CTA!)
- **Monetization** (for company/brand/org or specific product/service)

CTA(s)/CTV(s): [***]

Outline

- **Thesis:** [Main Idea]
 - **Supporting point**
 - **Supporting point**
 - **Supporting point**
- **Conclusion:** [Closer]

Meta and Social

- **Meta Title:** [Use different keywords than page title; can be an “seo-friendly” version of title]
- **Meta description:** [Put the focus keyword in the meta description. This will be highlighted in the search results.]
- **Social sharing** (1-2 messages per platform, use 2-3 hashtags):
 - **Twitter:** [fun, community-oriented message - 280 char. [limit](#)]
 - **LinkedIn / Xing:** [professional, brand-building -700 char limit, but keep short]
 - **Facebook:** [brand-building with a bit more personality - keep it succinct]
 - **Instagram:** [focus on photo - caption short and sweet]

An Example Content Brief



Communicate | Connect | Grow

Publish title: Five tips for writing a stellar case study

Byline: Jam//Christine?

Series/Designator: OSP Services

Asana: <https://app.asana.com/0/1193350288493280/1200925248146167>

Thesis: Here are five clear tips for building a great case study

Brand Message: OSP has expertise in writing for tech companies and special expertise in case studies.

Target Audience(s): small businesses, agencies, tech companies, potential OSP clients

SEO Target Keywords:

- Tech case study
- How to write a b2b case study

Audience pain points and challenges:

- "I want to write a case study, but I'm not sure how to begin."
- "I've written a draft of a case study, but I'm not sure what it's good or not."

Business Goals:

- **Awareness:** OSP has deep expertise in writing case studies
- **Conversion** (define in CTA!)
- **Monetization** Get people to hire us to write case studies or do a case-study writing workshop!

CTA(s): Learn more about our case study services

Resources:

- <https://audienceops.com/case-studies-content/>
- <https://drive.google.com/drive/folders/1srMbRUiGKOr6CiMzM3OZ4UTD0LZrcOhk>

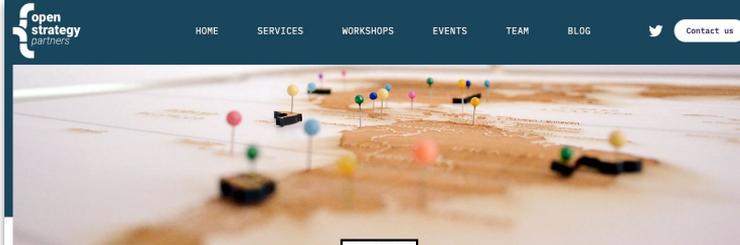
Outline

- **Thesis/Intro:** Case studies help convey your expertise and build trust with potential clients or customers because they tell real stories about the services you provide. You may have already written a draft, or have an idea for a story about how you helped a client or solved a problem. Here are five clear tips for building a great case study:
 - Write up a set of questions before you write
 - Whether you're writing about yourself or interviewing someone within your company or client partner, it can help to develop a set of questions that guide the shape of your case study
 - Define the problem space first
 - People won't know what problem was solved if they can't understand the problem.
 - Defining problem up front gives enough information and context for the rest of the case
 - Interview and quote somebody involved
 - Quotes help establish trust and tell a real story, in human language
 - Don't forget to describe the journey
 - While most people expect a case study to share a success, the journey can be just as interesting and telling (Yes, especially abandoned paths, learned-from mistakes, etc)
 - It's a chance to highlight expertise and how you weigh decisions
 - Highlight metrics or statistics as benefits
 - These help tell a story and reflect impact of project
- **Conclusion:** Learn more about OSP's case study services

An Example Content Brief

Outline

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writing & editing
19 November 2021 - John Heaven

Five Tips For Writing a Stellar Case Study

They may seem straightforward, but there's an art to creating a compelling case study. Here, OSP shares our best practices for writing high-impact case studies.

It can be hard to express the day-to-day work and problem-solving that goes into a successful client project. You might want to tell the world about the great e-commerce mobile app you built for one client or how you approached designing a multilingual website for another, but you're not sure how to share the story—and that's where case studies come in.

Case studies help convey your expertise and build trust with potential clients or customers because they tell real stories about the services you provide. Here are five actionable tips for building a great case study, sourced by OSP's writers.

[Learn more about OSP's case study services.](#)

1. Write up a set of questions before you write

For most case studies, we recommend interviewing a subject-matter expert, your client, or someone involved in the project. Even if you were involved in the project yourself, it's helpful to have an 'outsider' perspective because that's how your readers (and potential clients) will approach the subject.

Before your interview, develop a set of questions. These will serve as an outline and guide the narrative structure before you've written a single word. Even if you end up asking other questions—and you probably will—writing them down ahead of time helps you firm up what context your readers will need to know about the project and what kind of story you're hoping to tell.

2. Define the problem space

Your average case study might focus on the solution, but we think the problem space is just as important. Readers might not understand the solution if they don't understand the problem first: they need the right level of context to appreciate the case study. In describing your client's needs or challenges, you show that you take the time to understand project goals and that you've thought through everything that needs to be addressed in the course of an engagement. This adds credibility.

3. Quote the humans involved

A case study tells a story and often involves some reporting.

If you're already interviewing people involved, quoting them in the case study itself helps establish trust and tell a more compelling story. Don't worry too much about getting the "perfect" quote. People express more relatable emotions when they speak naturally and fluently.

Readers will get a sense of how your subject-matter experts felt about the project, what they worried about, and, near the end, what success felt like.



Case Studies



Case Study: <Client Name> - <CS Client Name / Topic>

OSP Admin

- **Case Study Subject:** [***]
- **URL(s) to link to in CS / for background info:** [***]
- **OSP Asana:** [***]
- **Client PM:** [***]
- **Client/end-user lead/contact:** [***]
- **Link to video interview/transcript:** [***]
- **Format:** [Online/Webpage, PDF print/download (1-side, 2-sides)]
- **Target length, base case study:** [500-750 words]
- **Product/Campaign:** [Main idea. The point of this Product/Campaign and this specific case study.]
- **Brand Message:** [Indirect message. What else do we want the reader to take away about the brand.]
- **Target Audience/persona(s):** [***]
- **Pain Point(s):** [***]
- **Business Goals:**
 - **Awareness:** [***]
 - **Conversion** (define in CTA)
 - **Monetization** (for company/brand/org or specific product/service)
- **CTA(s):** [Most case study CTAs would be "read more," "learn more," and/or "contact us" about relevant or germane topics]

Preparation

See also: [OSP Guide: Creating Case Studies](#)

Preparation

See also: [OSP Guide: Creating Case Studies](#)

Case Study Pre-Interview Brief

We need as much of the following as possible to build a good case study. This is some information to gather before speaking with your contact person.

- **Case study type:** [highlight the choice]
 - **Technology-focused case study:** How the client used [technology name] to solve their business problems or meet a business need
 - **Agency-focused case study:** Primary story: How the agency helped their client solve their business problems or meet their business needs using [technology name]
- **Industry:** [***]
- **Client & Client Industry (if agency case study):** [***]
- **Technology to highlight:** [***]
- **Business Problems or Needs:** [***]
- **Stats / Quantitative Evidence to request:** [***]
- **Facts, figures, anecdotes, supporting evidence:** [***]

Some Interview Questions ... adapt as appropriate:

1. Introduce yourself, explain what OSP does and how you work with [client](#)
2. Ask if you can record, record the interview subject's permission
3. How would you describe what your [company/organization] does?
4. How big is your organization? How many offices? Employees?
5. What's your role within the organization?
6. What challenge did your organization face? What made you approach [our client]?
7. What kind of goals or business needs did you have for the project?
8. What kind of solutions did you consider? Did you consider any other [orgs](#) besides [our client]?
9. Why did you end up choosing to work with [our client]?
10. What did [our client] do to complete the project?
11. What improvements were made?
12. [If possible prompt screen-share, visual information can be really helpful in this part. Screenshot parts you might want assets for]
13. What benefits have you seen from this implementation? Increased conversions? Sales? Traffic? Etc.?
14. What's next for the project? What are your future plans?

Case Study Outline

Use this section if you need client approval after the interview, before writing. When it comes to telling the story, we can be flexible in the presentation, order, headers, and so on. This basic information should be in every case study, though.

Problem(s):

Solution:

Benefit(s):

Base Case Study Draft

<h1 title-A success story in a single sentence>

<Optional Subtitle lays the groundwork: what was the challenge our client addressed?>

[Intro/Summary]

Write this last. Briefly summarizes:

- Who was involved: introduces our client [+ their client, their client's customer?]
- The high-level problem statement
- A teaser of why our client was right for the job

[Problem/Challenge/Struggle]

1-2 paragraphs max. Defines the 2-3 issues that will be resolved by the end of the case study.

[Solution/Journey]

1-2 paragraphs max. Describe the process and solution the client chose to solve this problem. Include why they chose it and how it was implemented.

[Benefit]

1-2 paragraphs max. Tie back to each of the 2-3 issues defined at the beginning of the case study and describe how they were resolved. Include quotes from beneficiaries and quantitative supporting points.

[Optional Call-out sections]

Consider pulling:

- Key figures
- Good Quotes
- Before & After Image or Stats

[Conclusion]

1 paragraph max, if needed. Stay compact, [keep](#) focused. Explain what their plan is for the future, or how this solution might apply to a broader group of people/clients.

(Optional CTA: usually 'learn more' or 'contact us')

Blog



writing & editing

15 June 2021 - John Heaven

Why Case Studies are Important for your Business

A compelling case study combines facts and experiences into a story. It is a vital, trust-building asset for your company. What do yours say about you?



When was the last time you purchased something online without at least reading some customer reviews? That would be brave. Case studies are the B2B version of online reviews. What do yours say about you and your customers? A compelling case study combines facts, numbers, and experiences into a story. It is a vital, trust-building asset for your company.

Blog



authentic communication

open strategy

07 July 2021 - Charlotte Han

How to Write a B2B Case Study That Wins You Business and Influences Buyers

B2B case studies are the most effective sales and marketing assets to win new business opportunities. Learn how to use them to convince and convert customers.



Did you know B2B case studies are some of the most effective sales and marketing assets for winning new business opportunities? Case studies help, especially if your product is complex and needs a longer sales cycle and further explanations? Docsend looked at 34 million content interactions and found that case studies have an average 83% completion rate! People really read them.

Blog



writing & editing

19 November 2021 - John Heaven

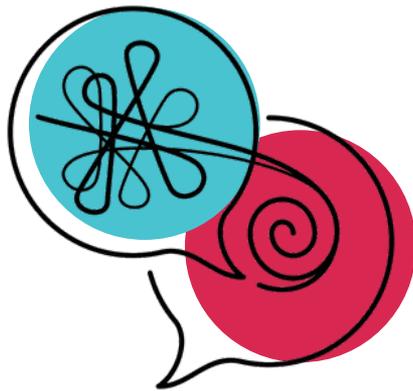
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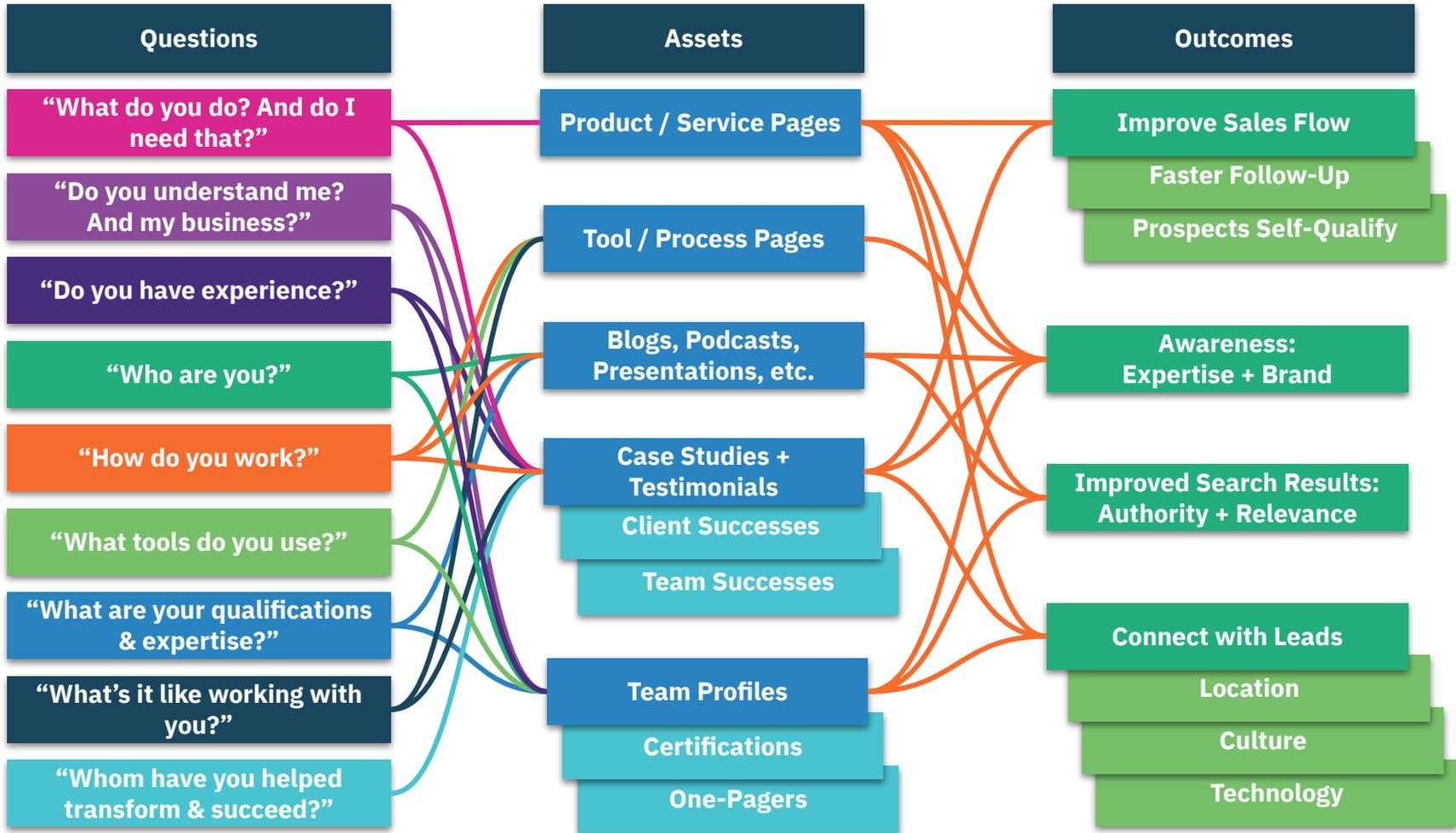
It can be hard to express the day-to-day work and problem-solving that goes into a successful client project. You might want to tell the world about the great e-commerce mobile app you built for one client or how you approached designing a multilingual website for another, but you're not sure how to share the story—and that's where case studies come in.

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Keeping Things “Simple”

Question > Asset > Outcome



ARE YOU MY AGENCY?

YOUR BRILLIANT AGENCY!

"We build and sell

SERVICES,

*as a **TEAM OF EXPERTS,***

SHARING our **KNOWLEDGE,**

*qualified & experienced
in using a set of*

TOOLS and **PROCESSES,**

*with a **PROVEN TRACK***

RECORD OF SUCCESS."

Growth & Success

**Product / Service
Pages**

Tool & Process Pages

Blogs, Podcasts, etc.

Team Profiles

Case Studies, Testimonials

Communication to support growth & success:

ARE YOU MY AGENCY?

We build and sell **SERVICES**

... described in terms of benefits, challenges, and solutions on **product and service pages**.

Sharing our **KNOWLEDGE**

... via content: **blog posts, podcasts, conferences**, etc.,
... aimed at relevant audiences,
... pitched to their language and level of expertise,
... also building your SEO authority and relevance.

As a team of qualified **EXPERTS**

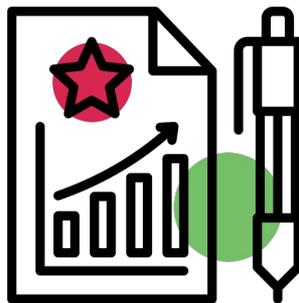
... with (SEO-tuned) **team profile pages**,
... and bylines on relevant blog posts and assets.

Experienced using a set of **TOOLS & PROCESSES**

... described in terms of benefits, challenges, and solutions on **tool and process pages**.

With a **PROVEN TRACK RECORD OF SUCCESS**

... backed up by (SEO-tuned) **client case studies and testimonials**.



Recap

- *Make your website your best sales tool.*
- *Are you my agency?*
- *Help yourself. Help your prospects.*
- *Build your agency house.*
- *Some content models*
- *Keeping things simple*



Thank you! Questions?

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