

Marketing case study outline

Use this template to structure a case study that highlights how your product or service helped a client solve a problem and achieve measurable results. This type of case study can be used for sales and marketing purposes. The layout is suitable for a PDF or webpage.

Case Study Title.

Write a compelling, benefit-driven title.

Example: 'How [Client Name] Increased Conversions by 45% With [Your Solution]'

Client introduction.



Introduce the client and their business.

Mention the size of the business, its industry and goals.

In a few words.

Use four or five bullet points to summarise the case study.

This gives the reader a quick view of what's to come.

The challenge.

Describe the impact of the key problems or pain points the client was facing. Talk in terms of losing sales or increasing service costs and explain the impact in measurable terms.

For example, sales had declined by 20% in the last six months; after sales service was costing twice as much as twelve months ago.

The solution.

Detail the solution you provided and again include stats to make the situation and solution relatable. This is the main section of the case study so give a comprehensive explanation. Add graphs, before-and-after images, or charts to support your results.

The results.

Summarise the key outcomes with data and specific metrics. Include a quote or testimonial if available.

Call to action.

Finish up with a clear CTA such as

“Get in touch to see how we can help your business grow.”

Remember to include an easy way for the reader to contact you.