



Top Tips



Creating Compelling Case Studies

People

This guide will be useful for: community transport operators of all sizes who want show the value of what they do by telling their story.

What you want to achieve:

Some powerful case studies that convey the impact of your work to prospective funders or supporters, which can be used in a variety of ways.

What you'll need:

Willingness to focus on storytelling

Some engaging feedback from people you support

Understanding of your marketing and communications strategy

How you'll do it:

- “Tell me a fact and I’ll learn. Tell me a truth and I’ll believe. **But tell me a story and it will live in my heart forever.**” (Film-maker Ed Sabol).
- Simply put, **case studies are ‘stories’ that show the value of your activities or services.** They are stories about people and have a clear beginning (**‘before your intervention I had some difficulties...’**), middle (**‘this is what you did to support me...’**) and end (**‘my life is better now because...’**).

- Focus on *telling a good story* from start to finish. **It needs to engage your audience.** You only have a few seconds to grab their attention, so that first sentence is an important one. Don't waste it on background information, for example: instead of starting a case study with, "**Arthur has been using Anytown Dial a Ride service for the last 5 years and says it has helped him**", you could start Arthur's story with "**I used to look out of the window, and see my neighbours hopping in their cars and going out, while I didn't know if I would be able to leave my home again...**".
- Support skim reading. Your audience may be skim reading your website, blog, or funding proposal so think about **how** you present information. **Use descriptive and eye-catching headings, highlight quotes and put key insights into boxes.** Keep text short and use lots of visuals, photographs, or infographics, where appropriate.
- **Think about why you are writing your case studies.** It helps to have the answer in your mind as you are writing. You might be writing a case study to illustrate to a potential funder the impact your charity/organisation has, or you may be writing it for your website or a blog, to raise awareness about your work more generally.
- What do you want the reader to think, feel and do? Thinking about these questions **before** you start writing really does **help you focus on what message you want to convey** through the case study.
- Use direct quotes and let the person's words speak for themselves wherever you can as they always sound more authentic. Using the voices of the people you help is the very best way to demonstrate your organisation's impact. They show readers how effective you are rather than simply telling them. **'Show, don't tell'**, is a good mantra when writing case studies. Let the reader make the connections or fill in the blanks. Make sure that you have checked with the person being quoted that they are happy for you to use their quote. **Pick out one or two powerful quotes as well as a visual that supports the story you are telling.** Include the **'why'** as well as the **'what'** – it's important with a case study to not just outline what was done, but why as well.
- Focus on **quality over quantity.** Having one or two really strong case studies beats half a dozen 'so-so' case studies, **so take the time to develop your case studies and find the best examples of your work.**
- **Provide a variety of formats.** You may want to have some written case studies for including in funding applications or you may want some YouTube video or podcast case studies for your website.
- Use a consistent framework to help you plan your content and ensure that case studies have some consistency. **Develop a basic template to help you gather the information you will need.**

You may want to include questions to gather information on: overview, challenge, approach taken / journey to the solution, solution, results.

- A typical case study format therefore, could be: 1. Title, 2. About the subject, 3. Challenges and objectives, 4. How the solution helped, 5. Results, 6. Supporting visuals and quotes, 7. Future plans, 8. Call to action. Not every case study needs a call to action but if appropriate **you can encourage your reader to take an action after learning about your organisation's work and how it changes lives.**
- **Find the right case study candidate** – is there a volunteer driver who literally goes the '*extra mile*' to support passengers? Is there someone your service has supported whose life has been changed for the better? For example, if developing a case study around volunteering you could ask them how they have benefited from volunteering with your organisation, what have they learned about themselves, what motivates them to volunteer, what they would say to other people thinking about volunteering. It is good to show progression – has the volunteer's self-confidence improved as a result of the training and support you provided? Do they now offer reassurance and a warm welcome to new volunteers as part of *their* induction?
- **Get feedback.** Test your case studies by asking colleagues or people outside your organisation for their views. Is there enough information? Too much? What would make it a more compelling case study? What key details would they need to know?
- Although case studies are often developed for fundraising purposes – **don't forget to put them in your annual report / annual review and on your website.**

Connecting Communities in Wales

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