



Passnotes

Best Practice in PR and Marketing



THE HENLEY GROUP INTERNATIONAL

The Case History:

Illustrating expertise and establishing credibility

While it is widely agreed that the case history makes a powerful sales and promotional tool, there is widespread confusion about its function and format – even amongst seasoned PR and marketing professionals.

In fact, many of the ‘case histories’ we see are not case histories at all. They range from the briefest of customer references, to dense and detailed product specifications. Neither lends itself to broad PR and marketing use.

THE ROLE OF THE CASE HISTORY

The case history provides an overview of a customer experience or end user application, demonstrating how a product or service meets the needs of the user in question.

Its value to sales and marketing lies in its ability to both establish and confirm the credibility of an organisation, and provide tangible evidence of its capabilities. Most are supported by the positive comments of an end user or customer.

Done well, a case history is a powerful sales tool that can be put to a wide range of PR and marketing purposes. It is highly valued by editors and represents one of the best ways of achieving detailed, in depth coverage in the trade and business media.

Beyond PR use, many organisations use case histories as sales collateral; or as supporting documentation that helps establish experience when responding to tenders or requests for information.

WHAT A CASE HISTORY SHOULD ADDRESS

In a business-to-business (B2B) context, the case history should consider any specific challenges that an end user had identified – and how these were overcome.

Evidence of having provided excellent sales attention, great service or after sales support is also important, while the best case histories frame the application in terms of a partnership between supplier and customer; showing how an organisation provided a tailored solution to meet the end user's needs.

Above all, a case history must demonstrate the added value delivered by a product or service in terms of clearly understood business benefits.

This means showing how cost was reduced, efficiency improved, or energy saved. It is crucial that these benefits resonate with a general audience and don't appeal solely to those with in-depth technical knowledge.

CONSIDERING THE AUDIENCE

The audience for the case history should be given close consideration before development. In a B2B environment, there may be multiple audiences including the end users, purchasers, specifiers or installers of a product.

Organisations might also wish to influence distributors, dealers or retailers. So, while the basic story might be the same in each case, different versions should be produced to address these audiences. These may require changes to the tone and detail provided to ensure they are of interest.

THE DEVELOPMENT PROCESS

Undertaking case histories is no easy task. A wide number of parties can be involved in a case history, all of whom may need a say in its development.

The identification of potential case history subjects often depends on the willingness of salespeople to refer leads to PR and marketing personnel, and these are busy people more focused on sales than identifying good PR stories.

Furthermore, organisations that depend on distributors or installers are one stage removed from the end user and so sometimes lack visibility on how their products and services are being used; meaning case history leads are hard to come by.

With many parties involved, getting face-to-face meetings is often impossible. An initial conference call helps to agree the scope and detail of the case history, while the circulation of drafts to all parties as the story progresses ensures their respective comments are considered.

Having one point of contact throughout helps keep the project on track and ensures that control over the key messages is maintained, and the newsworthiness of the story is not diluted. Once drafted, a selection of visually arresting images of the application or customer site should be obtained as these will strengthen its appeal to the media and make for stimulating sales collateral.

Finally, it's essential that the approval of all parties – including intermediates such as installers, distributors or dealers, as well as end users – is obtained before use with the media and in any marketing activity. Failure to obtain these approvals puts the customer relationship at risk and should be avoided at all costs.

USING CASE HISTORIES

The primary function of the case history is as a piece of PR collateral; a story of between 800 and 1,500 words, placed with a key title on an exclusive basis to obtain the best position within a publication.

Attempts should be made to place the case history in a vertical sector title, as well as one targeted from the organisation's core media. After initial publication as an exclusive, the story can then be distributed more widely to the media at large.

The case history should then be reworked to be more sales-orientated and reformatted as sales collateral. This can then be made available to the salesforce for sales use and to end-users as a download from a website.

Increasingly, case histories are also turned into videos of 2 or 3 minutes in length, leveraging any willingness of customers to talk to camera about the application and drawing on stock footage or simply static shots of the application itself. These videos are ideal for web use, provide excellent content for social media activity, and are useful in sales presentations.

AN EXAMPLE OF A CASE HISTORY

Henley Group client Trend Control Systems helped McDonald's reduce its energy usage across 1,100 UK restaurants by installing Trend's building energy management systems.

The case history lead was provided by one of Trend's partners, Powell Systems Engineering, and the story confirms the credibility of both Powell, the installer, and Trend, the manufacturer of the products supplied. Once drafted and approved, the case history was placed exclusively in Leisure Design and Build magazine, helping Trend to target restaurants and retailers in similar commercial situations.

The case history was also rewritten to form a piece of sales collateral and an edited version took pride of place in Trend's customer newsletter. It also provided valuable content for social media activity and was featured on Trend's website as evidence of vertical experience in the retail and leisure sector.

TREND McDonald's®

Trend Controls' BEMS helps McDonald's meet its sustainability targets

McDonald's has installed Building Energy Management Systems (BEMS) from Trend Controls across 1,100 of its UK restaurants. Not only does this reduce costs it helps make it one of the world's most sustainable quick service restaurant chains.

Since it was founded in 1954, McDonald's has grown from a family burger stand to one of the world's most recognisable restaurant chains, with more than 30,000 locations in 118 countries. The company opened its first UK restaurant in 1974, which is still operating in Woolwich, London, and it now has a total of 1,200 restaurants across the UK.

Energy efficiency is incredibly important to McDonald's and it has a carefully defined and maintained sustainability agenda. Peter Schroeder, the company's energy and environment consultant, explains, 'Like many other multi-site quick service restaurants, energy usage is something that we need to monitor and manage from cost and environmental perspectives. We are also part of the Carbon Reduction Commitment (CRC) Energy Efficiency Scheme and have to measure and report our energy consumption. These factors mean that it is more important than ever that we use energy wisely.'

Each one of its restaurants is given strict usage targets and has the latest technology to monitor and manage its energy. The task of installing this equipment is given to Sidcup based Powell Systems Engineering.

The company specialises in the design, installation and maintenance of BEMS and for the last five years has been involved with specifying equipment from Trend Controls throughout McDonald's UK outlets. Ian Powell, managing director of Powell Systems Engineering, comments, 'For all new restaurants we get involved at the planning stage so that we can design site specific systems, while for existing restaurants we retrofit solutions based on what is required.'

Powell Systems Engineering has enjoyed a long and successful working relationship with Trend Controls, and asked what he puts this down to, Powell replies,

'We believe that Trend manufactures some of the most robust and reliable products on the market. They are also incredibly flexible, which means that whatever environment we have to install a BEMS in – whether new build or an existing location – it will meet the client's exact needs.'

Powell Systems Engineering's relationship with Trend has also gone from strength to strength and the company recently became an IQ Assured Accredited Partner. Only companies that operate at the pinnacle of their profession can achieve this designation. In order to qualify, a business must be a building controls specialist and an authorised supplier of Trend systems. Accredited Partners are regularly audited to ensure they are maintaining high standards of workmanship and quality control, and are given access to Trend's latest diagnostic tools.

The BEMS at the McDonald's outlets are based around Trend's IQ3xcite controllers. The versatility of the devices has proved ideal in every situation, despite the wide variety of air conditioning and other plant they are called to control. The controllers monitor cold stores, fridges and air extracts at each site, as well as monitoring and controlling air conditioning. At drive-through locations, the controller also switches on and off external signage and car parking lighting automatically, depending on natural light levels.

The IQ3xcite controllers have also been configured with ModBus for energy monitoring functionality and each restaurant is linked to McDonald's virtual private network (VPN), which enables all data to go to a central monitoring station. Every restaurant manager is able to view data and temperature trends, and can change times and settings using a PC with a graphical user interface. Powell Systems Engineering is also able to update software as necessary, view system data, adjust plant settings and rectify system problems, all without visiting the site.

McDonald's has increased the numbers of customers it serves by nearly 20 per cent in three years, whilst at the same time reducing its energy consumption through precise temperature control and avoiding the unnecessary operation of plant and lighting. New innovations such as rooftop air handling systems with fan speed control and water filter monitoring are also being implemented to make further savings.

TEN TIPS FOR BETTER CASE HISTORIES

1. Consider the primary audience. Sales channel or end user? If sales, then direct – or dealers and distributors?
2. Highlight any challenges the application presented and explain clearly how these were overcome.
3. Focus on the business benefits that have been achieved, such as efficiencies gained or processes improved.
4. Underline any financial savings made; expressed in monetary terms if possible, or percentages if not.
5. Obtain written approvals from all parties – especially the end user and share target media lists if requested.
6. Source visually arresting images to accompany the case history, even if these are only library shots.
7. Tie the case history to any regulations that govern the use or specification of the product or service.
8. Include supportive quotes from the end user or the customer wherever possible.
9. Produce a more sales-orientated version of the case history to form the basis of powerful sales collateral.
10. Consider turning the case history into a brief video – especially if end users are willing to talk.

Copies of other Passnotes, the Henley Group's guides to best practice in PR and marketing, can be downloaded at www.henley.co.uk



The Henley Group is a specialist PR agency with over thirty years' experience helping mainly B2B organisations realise their PR and marketing goals. Client experience includes work for some of the best known technology and industrial brands, as well as high-tech start-ups, not-for-profits and businesses seeking to secure a foothold in the UK.

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