

## Case Study Planning Template

Use this template to help you collect and publish the most effective case study for content and marketing purposes.

---

Case Study Name: \_\_\_\_\_

Start Date: \_\_\_\_\_

End Date: \_\_\_\_\_

Product/Service Being Used in Case Study: \_\_\_\_\_

Customer / Client Goals: \_\_\_\_\_

---

---

---

Goals for Marketing Purposes: \_\_\_\_\_

---

---

---

Scheduled Meeting Dates and Times:

---

---

---

---

Meetings to Take Place:  In Person  Phone  Email

Contact Information: \_\_\_\_\_

Records to Be Collected (ex. photos, statements, 3<sup>rd</sup> party evaluations, etc.)

---

---

---

---

Where and How Case Studies Will Be Published (include information about the formats you will use. Ex. PDF, video, audio, slide show, etc.)

---

---

---

---