

## Case Study Planning Template

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

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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.)

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

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