



Strategy-powered words that sparkle and convert

Case Study Interview & Storyline Guide

From customer conversation to a credible narrative

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April 17, 2026



Contents

1	Before the call	2
2	Interview flow (45–60 minutes)	2
3	Probe bank (use sparingly)	2
4	Story spine	2
5	Quote capture	2
6	Approval checklist	2
7	One-page outline template	3

1 Before the call

- **Goal:** one clear metric or outcome the story will centre on.
- **Participants:** practitioner + sponsor (optional); loop in legal/PR if regulated.
- **Permissions:** signed release to use logo, quotes, and metrics (exact wording).

2 Interview flow (45–60 minutes)

1. **Context:** company, role, what they were trying to fix before you.
2. **Status quo pain:** time lost, revenue risk, team frustration—in their words.
3. **Decision:** why they chose you over alternatives or inertia.
4. **Implementation:** what surprised them; what your team did that mattered.
5. **Results:** before/after numbers, timeframe, caveats (honesty builds trust).
6. **Forward look:** how they use you now; referral willingness.

3 Probe bank (use sparingly)

What would have happened if you hadn't changed?

What almost stopped you from moving ahead?

What do you tell peers who ask about this?

4 Story spine

1. **Situation:** brief context.
2. **Complication:** what was going wrong.
3. **Resolution:** what you did together.
4. **Evidence:** metrics, quotes, artefacts.

5 Quote capture

Gold standard: short, specific, attributable.

Avoid: overwritten PR speak; ask them to say it again like they're texting a colleague.

6 Approval checklist

- ✓ Metrics validated with owner; caveats noted.
- ✓ Quote sign-off; logo usage confirmed.
- ✓ Competitor names and sensitive data redacted.
- ✓ Legal disclaimer if needed (past performance, industry-specific).

7 One-page outline template

Title pattern: [Customer] [achievement] with [your offer] in [timeframe].

Pull quote: _____

Metrics: _____

CTA: _____

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