

STARTUP SELLING: HOW TO CREATE KILLER CASE STUDIES

Your Pre-Interview Prep

- Block off at least 30 minutes for your interviews, even if the actual interview is only planned for 5-10 minutes.
- This will give you time to set up and re-record in case of significant technical issues.
- Turn off or mute phones and other distractions or sounds around you.
- If you're in an office or conference room, post a notice on the door that reads - "Recording in Process - Please do not Disturb."
- Prepare concise, open-ended questions. Use the "Case Study Worksheet" provided to you.
- Have an intro and wrap-up prepared and ready.

Technology & Logistics

- Check your Internet connection - the stronger the better. Plug into a LAN cord if necessary to avoid wifi hiccups.
- Avoid moving your table, workstation or camera so that the recording is stable.
- Avoid headphones if possible. It's worth investing in a good external microphone, but if you have to choose, always opt for good audio over no headphones.
- Avoid backlighting - adjust your position so that you are facing windows and bright lights. Use desk lamp or cell phone flashlight to improve your front lighting.
- Schedule your case study recordings mid-morning (10-11:00am) for best natural lighting from windows.
- Set your recording resolution to the highest setting possible.

Prepping Your Interviewee

- Let your interviewee know that the recording will be edited, so they shouldn't worry about making their answers perfect. It should feel like a conversation between two friends.
- Don't let the client script their answers ahead of the interview, even if they ask. Share the topics of your questions ahead of time, but not the actual questions. This reduces anxiety for the interviewee to give you the "perfect" answer and sounding over-rehearsed.

For example:

Interview Question: "What were some of your hesitations before decided to move forward working together?"

Topic: "I'm going to ask questions about when we started working together..."

- Inform your interviewee that you will pause for 2-3 seconds between each question.
- Safety Net - for ramblers and repetitiveness say, "The camera went out/there was a glitch - Can you sum that up in two sentences?"
- Prepare your interviewee to repeat the question back as the first part of their answer.

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For example, if one of your interview questions is - "What do you like most about the XYZ Product?" then the interviewee should begin their answer with - "What I like most about the XYZ Product is...."

During Interview

- Get your interviewee comfortable talking before interview. Hit the record button when you first begin the call, then start with some casual conversation before jumping into the actual interview. Talk about the weather, tell them a joke and keep the pre-interview conversation positive. Once you sense they are comfortable, then begin the interview by saying - "Should we get started?"
- Avoid verbal queues especially if recording on platform like Zoom because the screen shifts to the active speaker. This includes "Uh-huhs" and "Yeps" that you might feel inclined to add during an interviewee's answer. Nodding is good.
- It's okay to respond to interviewee answers, just leave a pause in between their answer and your response so that the video editor can edit parts of the conversation if needed.
- Create a universal feeling for your questions and answers. Ask your subject to recap their answer or ask them: "For someone that isn't in SaaS, how would you explain what you just shared with me?"
- Look for specific answers, "What's a specific way that you...."
- Pause for 2-3 questions between each question and each answer. This allows for your video producer to use snippets of your interview or edit out any parts that you would like removed.
- "Safety Net" for ramblers and repetitiveness - if you have an interviewee that goes on too long for any answer, tell them: "There was a glitch in the audio. Can you sum up what you said in two sentences, please?"
- Never interrupt an interviewee's answer no matter what.
- Never make the interviewee feel like they did something wrong during the interview. It's hard to be on camera! Good structure in your interview such as asking the right questions and using pauses will allow your video editor to perform magic for you. :-)

Wrap-Up

- Always thank you interviewer for their time.
- Keep the recording and meeting running until after the interviewee leaves the meeting, then provide any instructions to the video editor directly after the interview. Share parts of the interview that you find were particularly good (or bad!) to give the editor guidance on what to highlight (or not!).
- Send the recording to your video editor ASAP so that you start using your new Case Study right away!
- Transcribe the audio so that you can prepare a written case study from the interview.