**CASE STUDY INTAKE QUESTIONS**

**Name of Company we are interviewing for the Case Study** – Contact Name We Will be Interviewing

Link to ^ their website here

Name of company we are creating this case study for – Contact Name From This Company

Link to ^ their website here

**Questions for the client:**

**These are the questions we’ll walk through on the intake call (send them to the client in advance):**

1. How does the relationship between you and company 1 (and company 2 if applicable) work?
2. What problems did the client face before you got involved? What were the issues? What wasn’t working? How did you help them address their problems?
3. What were they using/doing before this solution was implemented? Why did they find that previous solution inadequate?
4. How did they come to hear about your company and your solution? Why did they decide to implement this solution? Where there any other solutions in the running?
5. What was your working relationship like with this client?
6. What has been their experience with your customer service department, both with the planning/install and continued support?
7. Was it easy to customize a solution to their business needs? HOW did you customize?
8. What feature did they like the best about the solution? What is their favorite feature or strength of the solution?
9. Can you speak to how this solution is fiscally manageable and affordable to operate/maintain?
10. Do you find this solution well thought-out? Does this solution work well for their business(es)? Do you have ANY quantifiable data points to add to this story?
11. Have they used this solution to their company’s advantage? How has it played a critical role in the unique success of their business(es)?
12. How has solution helped their business(es) succeed in an increasingly competitive financial service market? How has it helped them surpass competitors?

**From the marketer, we will also need:**

* The clients’ Logos: .eps or .ai format preferred, otherwise the highest quality file available (i.e. largest size JPEG)
* Examples of current or past collateral for consistency OR samples of TSL work you like (<https://www.tslmarketing.com/tsl-marketing-case-studies-success-stories>)
* Image direction (be specific): tech imagery, real life images, people, abstract, etc.
* Confirm CTA, phone/contact info, etc.
* Any inspiration to model the design after

**Questions reworded for the client’s client (interview):**

1. What problems did you face before solution and company? What were the issues? What wasn’t working? How did solution and company help you address these problems?
2. What were you using/doing before solution? Why did you find that previous solution inadequate?
3. How did you come to hear about solution and company? Why did you decide to implement this ERP? Where there any other solutions in the running?
4. What was your working relationship like with company?
5. “QUOTE FROM COMPANY WEBSITE/COLLATERAL ABOUT HOW GOOD THEY ARE.” Do you agree? IF so, why? What have you seen? What has been your experience with the customer service department, both with the planning/install and continued support?
6. Was it easy to customize solution to your business needs? HOW did you customize?
7. What feature would you say you like the best about solution? What is your favorite feature? OR what do you feel is the greatest strength this what solution is (ERP, application, software, etc..) offers your company?
8. Can you speak to how solution is fiscally manageable and affordable to operate/maintain?
9. Do you find solution well thought-out? Does this what solution is (ERP, application, software, etc..) work well for your business?
10. Have you used solution to your company’s advantage? How has it played a critical role in the unique success of your business?
11. How has solution helped your business succeed in an increasingly competitive financial service market? How has it helped you surpass competitors?