SAAS ACADEMY

CASE STUDY CREATOR™

WORKSHEET

CASE STUDY CREATOR™

Hi, I'm Dan Martell. I've built, scaled, and invested in some of the biggest names in SaaS, like Intercom, Hootsuite, and Clarity. After coaching hundreds of founders and seeing firsthand what fuels growth, I know the untapped power of case studies done right.

But guess what? Most founders drown in tepid testimonials. They waste time on stories that don't resonate and then bury them where nobody sees them.

That's why I developed the Case Study Creator™ system.

This isn't some theory—it's battle-tested from the founders I've guided. This proven framework takes the guesswork out of creating case studies and turns them into your most compelling sales tool.business you're wearing 50 different hats. There's always something that needs to be done and fires that need to be put out yesterday.

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BUILD YOUR BRAND'S CREDIBILITY

I want to show you how to transform your customer success stories into powerful case studies that drive revenue.

Case studies that don't just sit on your website. They convert prospects into clients, make your customers proud, and get prospects excited.

But your case studies can't be an afterthought. I've seen too many generic and uninspiring case studies that miss the mark.

Effective case studies have to be concise and impactful. They should highlight key customer successes, address potential objections, and inspire confidence in your solution.

With the **Case Study Creator™**, you'll learn how to identify the ideal customers for your case studies, ask the right questions to uncover compelling stories, and showcase these stories in a way that maximizes impact.

This is the step-by-step playbook you need to simplify the entire process and make case studies your most compelling sales tool.

Let's dig dive in.

Notes

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CREDIBILITY LIGHTHOUSE

Name:

Date:

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CASE STUDY PLANNER

Case studies are the number one way to increase conversions. The more "proof" you can provide that what you're selling works for companies just like them, the more you'll sell.

Objections	Targets	Collect	Promote
Build creditibility | List the top 5 objections you're receiving from prospects.	**Source** | List 3 target clients that you're aware that they achieved a result that would help overcome the objection.	**Confirmed** | Once you've collected a case study, add it to the list below.	**Show, don't tell** | Circle the actions you're commited to taking once you've collected a new customer case study?
1.	1. 2. 3.	- - -	**1. Add to Home Page**
2.	1. 2. 3.	- -	**2. Add to Case Study Page** **3. Share with Sales Team**
3.	1. 2. 3.	- -	**4. Add to Blog Content**
4.	1. 2. 3.	- - -	**5. Add to Email Nurturing** **6. Share on Social Media**
5.	1. 2. 3.	- -	**7. Other:**

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TESTIMONIAL PRESENTER BLUEPRINT ™

Design	Example

Design:

①

Doubled Win Rates

②

John Smith, CEO ③
XYZ, corp

④ After signing up we quickly installed the product were able to inrease win rates from ⑤ **20% to over 40% within 2 weeks.** The product just works!

① Results-based heading
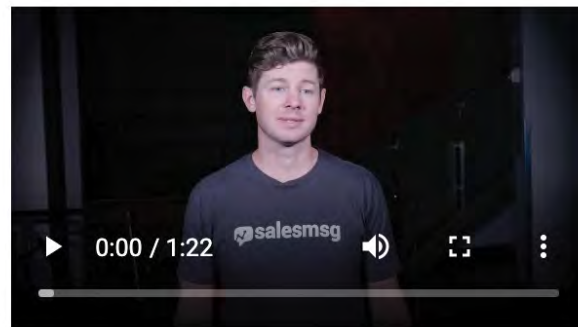
② Profile picture

③ Name, role & company

④ Short description of measurable result

⑤ Highlight the impact

Example:

Chris increased his company's MRR by 10 - 20% each month since joining SaaS Academy

▶ 0:00 / 1:22 🔊 ⛶ ⋮

Chris @ Salemsg

"Since joining SaaS Academy, we came into this with, I think, we were at six or seven employees, now we're at 12, we're going to be hiring three or four more. The company month over month is **growing between 10% and 20%** and that's MRR growth, then we have one time revenue that's growing. And so, all in all, we just see this nice chart going up, which is exciting because

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PERSUASIVE TESTIMONIAL BLUEPRINT

1. THE PERFECT INTRO™

Q: Who are you and what do you do?

A: "Hi, my name is [Insert name] @ Company Name and I help [Achieve result]."

EX: "...Hey there, I'm Darryl Hicks @ Flexpay.io and I help SaaS and Ecommerce brands reduce credit card declines."

2. CHALLENGE

Q: What challenges did you face before joining the program?

A: "Before signing up, I struggled with [Challenge or frustration]."

EX: "Lead gen, churn/retention, team building, burn rate over growth rate, fundraising, etc."

3. HESITATION

Q: What hesitation did you have about the program?

A: "I knew this program was what I needed, but [Insert objection you might have had]."

EX: "...As a bootstrap founder, it was hard to justify the investment..."
or "...I didn't believe the program was right for me..."
or "...I've already spent tons of money on programs in the past..."

PERSUASIVE TESTIMONIAL BLUEPRINT

4. REACTION

Q: What was your initial reaction when first joining the program?

A: "Once I joined the program, [Insert reaction]."

EX: "...The first pieces of content were very overwhelming, but I knew if I just applied focus I would see my business explode..."
Or: "...It was breathtaking how much value was in this community, Just being around other founders like myself sparked something inside me that I didn't know I had." | Or: "...I realized this was perfect for where I'm at as a founder, everything I learned just made sense..."

5. WINS

Q: How did the program impact your business and life?

A: "Since joining the program, my business [Insert win/result]."

EX: "... Our MRR grew 13% in the last month!..." | Or "...Increased trial to customer conversion rates by 31%..."
Or "...Finaly pulled the trigger and put our prices up 20%..." | Or "...Bought back 10hrs of my week and spending it with family..."

6. RECOMMENDATION

Q: Who is this program absolutely perforect for / would you recommend it?

A: "This program is perfect for founders who want to achieve [Insert result], so if you're one of those people, I would encourage you to get involved and [Insert a call to action.]."

EX: "...If you're a founder that wants to accelerate growth, have more structure and frameworks, and have world-class coaches propel you into this future then this program is right for you and I would invite you to join our community..."

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TIME TO SCALE

NEXT STEPS

Congrats! Prioritizing the power of social proof is a massive step in the right direction.

Now, you understand why it's critical to build case studies, how to build case studies that open wallets, and hopefully, you've put this into practice using this training as your guide.

Believe it or not, you're ahead of 90% of founders who skip this critical step, or worse, get it wrong.

But what about converting those new leads you've generated?

Scaling requires the right processes across all parts of your SaaS. Miss this and you won't grow.

Growth challenges like this are why we've built a world-class program founders rely on. To help them grow as leaders and power through any growth plateaus in their way.

Want to know if SaaS Academy is the right fit for your company and stage? **Hop on a Growth Session with one of our Scale Specialists**.

On the call, they'll do deep-dive on your company, identify what's stopping your growth, and give you a clear plan to move to the next level.

This call could change the trajectory of your business. Book yours now.

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BOOK A SCALE SESSION