

How to...write a good case study or success story

A case study should provide a window into the impact of your work. But it is also a story, so it needs a beginning, middle and end. Good stories draw in the reader and capture our interest.

A case study is a valuable way of sharing learning. When published by research organisations, case studies should be guided by the same integrity that is applied to other forms of writing. However, too often they gloss over the facts and present a version of events that is very hard to replicate.

There can be a temptation to overstate the positive aspects of a project and ignore or play down the less successful ones. The fact that case studies are often presented in a readable form, with quotes from people involved in the project, does not mean that they should not be objective. A case study should still be backed by evidence and data – even if it is not referenced like an academic paper.

Representative

The issues raised and experiences shared in a case study should have impacted on a substantial number of participants. As you start to write about the experiences of individuals, you need to know whether they are representative. Some participants will have unexpected additional benefits, others will have succeeded despite setbacks or constraints. You may have monitoring and evaluation information to help shape your choice of subject for a case study.

Editorial constraints

You need to be clear about whether there are any guidelines or format issues that need to be considered. The most likely constraint relates to the length. Check the brief carefully to make sure you know what is expected of you. It is very frustrating for editors to get writing that doesn't respond to the brief.

Whether or not you have a brief there are two vital questions you need to keep in mind:

Who is the audience?

Who is the audience for the case study and what is likely to attract and hold their attention? What can you assume they will know already – and what needs to be explained?

What is the take home message you are trying to share?

It is essential that case studies are honest. There is a need to be creative too, if the story is to be presented in an exciting and engaging way – then the detail is more likely to be remembered.

Find a hook...

A hook is what draws you into a story and makes you keen to keep reading. This may be a question, or statement or an interesting fact that grabs attention.

Remember the pyramid

Be clear about the 4 or 5 main points that have to be covered. Then structure the case study with the most important and compelling information needs to lead the story. So usually this means starting with the impact and working backwards.

Explain the context

Case studies need to be put into a context. This may be as simple as setting out an issue that was being addressed. This may be covered in a text box if the context is getting in the way of telling the story.

Collect the facts

How did the success come about? Who and what made it happen? How did they do it? Where did it occur?

Can you go and observe the positive impact or bring together a group of participants who can speak about the positive impact of the change, any unexpected impacts and any trade-offs that were experienced? This may help you to find a participant to write about. If not who can you talk to who will have this insight?

You need to find out how long it took for changes to be realized and undertake a simple costs benefits analysis (including analyzing the risks and negative impacts on participants or others).

Collect the supporting data

Supporting data may come from studies or reviews, interviews with people involved or from wider research of background sources. Unless the case study is part of your academic studies, it should not be necessary to formally reference sources of information. However, in web based case studies you should put in links to appropriate supporting documentation.

Now you have the data you may want to change the 4 or 5 points that you prioritised earlier

Talk to the people involved

Ask open questions which help readers to understand the impact beyond the hard facts. Where possible collect photos of the people involved which help to reinforce the messages in your case study.

Find the human interest angle

Successful case studies introduce us to a named farmer and often her family. They are pictured and the caption for the photo includes their names (see notes on photos below). Some basic family information helps us to care about the subjects. The 'so what?' is integral to the human interest angle.

A quote from a farmer, or her family, really helps to build the human interest element.

It is the stories about people that stick in people's memories long after the hard facts have been forgotten. Anecdotes should be indicative of factors experience by many participants – rather than unique experiences. Unless a participant particularly wants to be anonymous, they should be identified in the success story.

Explain the technology

For extension materials, it is important that the technology is explained in a way that is appropriate to the audience. This should avoid very complicated jargon and concentrate on the key principles being applied and any novel or innovative aspects. Few things are completely innovative – more often it is to do with the way that specific aspects are brought together in a specific context.

You may need diagrams and/or photos to help explain the technology.

What happened?

You will need to find a way of making this understandable and meaningful – so yield per hectare is good – but profit is better.

It may be helpful to reinforce impact data with graphs, charts or tables and especially photographs that show the before and after. The impact must not be overstated and evidence must be available to back up the claims made in the text.

So what?

The so what is the impact of the impact! *“So as a result of increasing the yield the children are all at school and the family has a bank account for their savings for the first time. They are saving for a tractor.”*

Sharing the lessons

Learning can come from positive outcomes but it can also come from projects that did not achieve everything that had been hoped. It is really helpful to spell out what you would do differently based on what you learnt

Style guide

The style of a case study should be informed but not overtly technical. So, avoid non-standard abbreviation and jargon. If you have to use technical language, make sure that you explain it in easy to understand terms.

Abbreviations should probably be limited to countries and organizations and chemicals – known primarily by their abbreviations.

Test the case study

Ask someone not involved in the project to tell what key messages they understand from the draft case study. If this doesn't match your plan you may need to adjust the copy. You also need to make sure that you are not overcomplicating the explanations or the language – it is very easy to do both.

Proof read your case study carefully

Make sure your case study is credible, accurate and dependable. Also double check the brief and make sure you have produced what is required.

You should now have a case study that is a credit to your project and which is capable of helping others to learn from your efforts.

Photos

Good images always help to bring any story to life – especially when they feature named individuals participating in the project. Special care must be taken in photographing children – seeking permission from the responsible adult.

Resolution: To make your photograph for the image to come out with a crisp, clean finish and become 'print-ready', remember the higher the resolution, the better.

Make sure that the digital camera is set to take the largest file size possible: a minimum of 300 dpi (dots per inch). The more dots, the better the image. Every digital camera menu has options to adjust for resolution settings.

Make sure that everything (photo size/quality) is set to HIGH.

Photograph quality/lighting. At the fundamental level, cameras require light in order to take a photograph. Too little light leaves your pictures dark and grainy, while too much light leads to over-exposure and washed-out images. The key is to strike a balance.

Natural light (sunlight) is always a plus, but hard to control. Avoid sunspots and silhouettes (or shadows) over your subject by NOT shooting directly into sunlight. Artificial “indoor” lighting can be controlled, but it’s often not strong enough to produce a clear/sharp picture.

Try to arrange backlights and front lights. The flash on the camera may assist in adding additional light.

Photograph framing refers to how the subject’s face or body is positioned within a picture. The concept of framing in photography should be applied to build a natural border around the focal point of your picture, drawing attention to the main object or subject.

Optimal framing can be achieved by making basic adjustments to your shot. Before taking a picture, take note of the angle and depth of field.

Often, all it takes to make a good picture great is a quick readjustment of the way the object is positioned through the lens of your camera - this can sometimes also be achieved by cropping a photograph.

Formatting. The JPEG (“.jpg”) is a commonly used method of compression for photographic images. Many cameras have JPEG as their default camera setting. This file format is preferred for publication materials because it is common and easy to deal with. Never embed the JPEG photographs into a word document. The image quality of the picture is lost when files are embedded into text documents. Take special care to send all photographs separately.

Labelling pictures and writing captions

File names. Your photograph file name should reflect details about the picture. Default file names like “001.jpg” or “Africare1.jpg” do not convey useful information about the picture. At a minimum, label your picture files with the following information:

Country.Photo Description. PhotographerInitial.LastName.Date.PictureID.jpg

Captions. As a rule of thumb, every picture should be accompanied by a caption. However, since digital photographs are separated as a JPEG, a list of pictures and captions must accompany the pictures in a separate word document.

In order to identify the picture properly, begin each caption with the picture file name that you used to label the picture.

Using the examples from above:

Picture #1: Caption #1:

All captions should include information about: who, what, when, and where.

Captions can also include information that did not fit in the narrative flow of the story

Remember, with digital pictures it becomes increasingly important to identify captions with the correct file name and the name of the photographer.

Inserting the name of the photographer is critical and can avoid embarrassing situations when a photograph is taken by a third party. Given the critical importance of captions and verifying the source of the photo, double check to make sure your picture file names and captions match up.