

**CASE STUDY
TEMPLATE**

PURPOSE:

Capture critical information about your biggest wins to help team members win similar opportunities.

DESCRIBE ON RIGHT:

1. **Who is the customer?**

Name and title

2. **What did you sell?**

Products, services, price, etc.

3. **Why did they choose you over the competition?**

Describe the tangible and intangible differences

4. **How will this customer be different as the result of doing business with us?**

Describe the impact our products and services will have on the customer's business, their customers, their employees, etc.

Do you have a purpose?

Or do you just sell stuff?

Adapted from
Selling with Noble Purpose
by Lisa Earle McLeod

1. Customer -

2. What you sold -

3. Why did they choose you over the competition?

4. How will this customer be different as the result of doing business with us?