

Part I: When and How to Use Customer Testimonials & Case Studies



Customer testimonials and case studies are powerful marketing tools that help build trust and convert potential customers. They should be used whenever possible, especially during product launches, in outbound sales emails, on websites, in investor pitch decks, and PR kits.

To determine which customers to feature, businesses should align their choices with their campaign strategy, considering the key features they want to highlight and the industries they want to target. **The best testimonials come from users who deeply engage with the product and can illustrate a strong before-and-after transformation.**

At Stripe, this process included identifying ideal users, sometimes even before they became customers, and working to onboard them strategically. For example, Stripe targeted Atlassian years before finally securing them as a case study. **The goal is to balance well-known brands for credibility with smaller companies that showcase compelling use cases.**

Effective case studies highlight tangible benefits and specific improvements. Instead of general praise, *they should detail how a product changed workflows, saved time, or increased revenue.* For example, in Stripe's Connect campaign, they emphasized that within a year of adding Instant Payouts, more than 50% of Lyft's driver payouts used the feature.

- 1. Where should you showcase testimonials?** (Website, social media, sales materials, emails)
- 2. How can you identify the best customers for testimonials?** (What qualities make a great case study?)
- 3. What types of testimonials work best for your business?** (Written quotes, video testimonials, success stories)
- 4. How can small businesses encourage customers to provide testimonials?** (Incentives, timing, asking the right questions)
- 5. What metrics can you highlight in your case studies to showcase impact?**

Coming Next Week: Building a Culture of Storytelling

Now that we've explored when and how to use customer testimonials, next week we'll dive into the different types of case studies and how to create a system for consistently gathering and sharing customer success stories. Stay tuned!