

**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?**