LoftyBiz Case Study Interview Sheet

Choose a best-fit customer, get permission in writing, ask about fears and turning points, write the story in four parts, and let the customer check every word.

Example figures. General education, not financial or legal advice. Results vary. These are examples, not promises.

This week

Pick one customer who looks like the buyers you want more of. Send a short message asking if they'd share their story, and make it easy to say no. If they agree, ask the five questions, write the story in four parts, then send it back for their approval before you use a single line. Keep the customer, the permission date and the draft stage in one list.

1. Permission first

Step	Done?	Notes
Choose a best-fit customer (not only your biggest)		
Ask by message or email, and explain where the story would appear		
Promise they can read and change it before anything goes public		
Say clearly that a "no" is completely fine		
Get permission in writing (a short written consent)		
Agree what can be named (first name, type of business, or nothing)		

Never invent a quote or stretch a number. If the story isn't honest, it isn't proof.

2. The five open questions

Question	Your notes (the customer's own words)
What was going on before you hired us?	
What worried you most about switching?	
Was there a moment you knew it was working?	
What's different now?	
What would you tell another buyer who's unsure?	

Record the conversation only with permission. Keep numbers modest, and leave out any figure the customer isn't sure of.

3. Write the story in four parts

Part	Write it here, in the customer's story, not as a list of your services
The situation	
The worry	
The turning point	
The after	

Send the draft back for approval. Remove anything the customer asks you to remove. Use only what they have agreed you may name.

4. If you can't name anyone

Say clearly, in the first line, that the story is a representative example based on similar jobs, and that details have been changed. Base it only on work you genuinely did. Use no quote from any single person if the story is a blend. Offer it as a useful download if that helps the next buyer.

5. Worked examples (illustrative only)

Example	What they did	Figures (examples, not promises)

Anneliese, bookkeeping firm for cafés, Lubbock (USA).	Interviewed one best-fit café owner (two locations). Wrote situation, worry, turning point, after. Owner approved the draft. Used first name and type of café, not the business name.	Package $450 / month. Calls got shorter, and she signed a few more café clients than in the quarter before. She can't prove the case study caused all of that.
Aroha, commercial cleaning company, Fargo (USA), 12 staff.	Built a clearly labelled representative case study from three office moves, with no client named. Turned it into a useful checklist download, then sent a short personal note offering a walk-through.	Contracts around $1,900 / month. Over four months, about 70 downloads, around 10 walk-throughs, and a handful became monthly clients.

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