



**How To Write A Compelling  
Health & Wellness Case Study**

**Let Your Clients Speak For You**

THE **RADIAL** GROUP  
[www.radialgroup.com](http://www.radialgroup.com)

*You know healthy living.  
We know healthy businesses.*

**Table Of Contents**

The Purpose & Structure Of A Case Study..... 3  
Quick Reference: Sample Case Study .....10  
Quick Reference: Case Study Structure .....11

## Purpose

The ultimate objective of a case study is to showcase your professional capabilities or those of your business in a particular area.

Health and wellness case studies typically either 1) show how particular types of clients can successfully address a particular problem or opportunity or 2) highlight a particular process, service, or program that you offer.

## Structure

A good case study is like a movie. It has a beginning, middle and end.

We've underlined the key components of an effective case study below. The structure pulls the reader along. When you use the structure below, label each section of your case study *following the title* using the section headings shown in **ALL CAPS**. They'll serve as signposts to move the reader along.

You DON'T necessarily need to include the words shown in the smaller sub-headings, like The Journey or The Discovery. Those smaller sub-headings are there primarily to help you organize your thoughts as you write the case study.

However, if it's helpful to the reader you can certainly include them or create your own headings. Just remember that the headings do have a purpose – to take readers by the hand and draw them along as they read. So if you create new ones, make sure they accomplish that goal.

**WHEN YOU'RE READY TO START WRITING,  
REMEMBER THE QUICK REFERENCE GUIDE ON PAGE 12.**

### **TITLE**

Include the benefit to the client or customer in the title.

*Example:*

*"Case Study: How An Experienced Marathoner Set A New Personal Best At Boston"*

### **OUR CLIENT/CUSTOMER**

#### ***The Attention-Grabber***

Write an interesting "lead" about your customer or client.

*Example:*

# How To Write A Compelling Health & Wellness Case Study

*Laura bonked at Chicago. Dropped out at Honolulu. And NYC...better not to mention it at all.*

## **HIS/HER CHALLENGE or OPPORTUNITY**

### ***Current Situation vs Desired Outcome***

Describe the client's starting point – their situation when you first started working with them. Then describe the desired outcome – what COULD be, compared to what IS. Use the client's words as much as possible. Avoid substituting your own words and phrasing. The goal is a clear description of the client's problem or opportunity. It can be a negative consequence to avoid or a positive outcome to gain. Explain why it matters to them.

*Example:*

*"I'm not a competitive runner, at least not with other people. What really matters to me is how I do compared to what I think I can achieve. I'm so frustrated because I know I can do better, but I just don't know how to do it better."*

### ***The Journey***

Most clients have tried various strategies to reach their desired outcome. Describe what they've tried previously and why it didn't work. Give some sense of how long they've spent trying to fix the problem or capitalize on the opportunity.

*Example:*

*Laura had great experiences in her first three marathons—she did better than she expected, had fun, and wanted to go back for more. It's when she tried to improve her times that the frustration began. "First I thought I needed longer practice runs, but that just caused shin splints. That knocked me out for almost five months back in 2004. Then I came across Chi Running, and it really helped my posture, but not so much my speed. By 2005, I thought maybe I needed to join a club because I was getting frustrated, but I didn't like feeling like an outsider—it distracted me from my running. This year I went back to training on my own, and then I bonked big-time at Chicago. I knew at that point I had to try something new."*

# How To Write A Compelling Health & Wellness Case Study

## ***The Discovery***

Explain how the client happened to find you. Perhaps it was a referral or a Google search, for example.

*Example:*

*We first met Laura through a referral from Jill Warren, a master's runner that she met at Luke's Locker, a running store in Denver.*

## **THE SOLUTION**

### ***Your Program or Service***

Describe the programs or services offered by you or your business that helped this client reach their goal. Focus only on the services that this client actually used. Don't include a sales pitch for services that they could have – but didn't – use. Avoid big words when small ones will do just as well. And avoid "marketing speak."

**NO:** High-quality and risk-minimizing performance environments are an essential prerequisite for direction and facilitation of optimal cardiovascular reserves among adult populations.

**YES:** Well-maintained and easy-to-use equipment is important in helping clients achieve aerobic fitness.

Finally, use objective, descriptive language, not persuasive, emotional language (unless you're quoting what the client says).

*Example:*

*Laura came to us for personal coaching on her entire running program. We offer a one-on-one coaching program for runners who are serious about their results. It usually lasts at least nine months. We develop a personalized plan, test it before races, and then work with the client to tweak it after each race based on results. Once the plan's in place, we usually observe a couple of training sessions every three to six months just to spot any potential issues and talk about anything the client thinks needs some attention.*

## ***The Implementation***

Explain how you implemented your programs or services on behalf of this client. Disclose any problems that developed and how you and

## How To Write A Compelling Health & Wellness Case Study

your client resolved them. If you did anything to go the extra mile, describe it.

*Example:*

*We met with Laura first to talk about her goals and what she had tried so far. If we had thought her goals were unrealistic, we would have told her so. But her goals seemed fine. What was missing was a comprehensive program that combined the physical aspects of training to improve her speed with a new approach to nutrition and fueling, plus we needed to lower her stress level before races.*

### **THE RESULT**

#### ***The Outcome***

Describe the results of your approach and the client's work. Answer these questions: Did the solution work? What change did it cause? Use a quote from the client if possible.

*Example:*

*Laura broke her personal best at Boston, thanks to a very structured interval training method, the pre-race checklist we developed and a balanced approach to fueling. We had zeroed in on these items during the six months leading up to the event. "Two things really made the difference at Boston", she says. "Having a pre-race checklist really calmed me down because I knew I wouldn't forget anything, plus I used the relaxation stuff that Amir had worked with me on." We also added some protein and fat to Laura's pre-race meal of pasta, and had her take gels every 30 minutes during the race. Instead of bonking like she did in Chicago, she said "I really felt great, even at the 19-mile mark!"*

#### ***The Recap***

Briefly recap and conclude the story. End with a reference that shows how your expertise will continue to pay off for your client in the future.

*Example:*

*Laura's new approach to training and nutrition is paying off for her. She's planning on having fun (and finishing in the top 3 in her age class) at Stockholm in June!*

## Writing Tips

- Be as specific as possible. Avoid vague or generic comments. For example, “We met three times/week for six months” is better than “We met periodically.” “Laura’s blood pressure improved to 110/70, the normal zone” is better than “Laura’s test results were better.”
- Use statistics, numbers, and other facts and data where possible and appropriate. Examples include pounds lost, fewer work days missed due to lower back pain, competitive results, fewer headaches due to work stress, a deep feeling of serenity and happiness when waking, and improvements in lab tests.
- Keep the final length of your case study to around 500 words or fewer. It’s often easiest to simply write spontaneously, without worrying about length or organization. Next, reorganize what you’ve written into the sections we’ve identified, using cut-and-paste. Finally, edit what you’ve got to meet the word count. (Laura’s hypothetical case study totals about 550 words.)
- Avoid extremely long sentences. Avoid \$5 words when 25-cent words will do. For example, “best” vs “optimal” and “facilitate” vs “help”.
- Avoid “marketing speak”. It instantly reduces the credibility of the case study. Case studies are a “tell, don’t sell” approach to marketing.
- Write your case study using the **snack/bite/meal** approach. This technique makes it easy for readers to skim or read it closely, particularly if you include the case study in an e-mail newsletter or on your website.

Here’s an example of the snack/bite/meal approach for a hypothetical “Result” section. Notice how each section builds on the previous one.

(SNACK: a brief headline)

*Laura sets a new personal best at Boston!*

(BITE: one or two sentences that summarize the content in this section)

*Laura sets a new personal best at Boston, thanks to the pre-race checklist we developed and a balanced approach to fueling!*

MEAL: a paragraph or two providing more detail for the seriously interested reader)

*Laura sets a new personal best at Boston, thanks to the pre-race checklist we developed and a balanced approach to fueling! We had zeroed in on these items during the six months leading up to the event. “Two things really made the difference at Boston”,*

## How To Write A Compelling Health & Wellness Case Study

she says. *"Having a pre-race checklist really calmed me down because I knew I wouldn't forget anything, plus I used the relaxation stuff that Amir had worked with me on."* We also added some protein and fat to Laura's pre-race meal of pasta, and had her take gels every 30 minutes during the race. *Instead of bonking like she did in Chicago, she said "I really felt great, even at the 19-mile mark!"*

Here's what the final version of this section of a case study might look like in your e-mail newsletter or on your website:

***The Result: Laura Sets A New Personal Best At Boston!***

*Laura breaks her personal best at Boston, thanks to the pre-race checklist we developed and a balanced approach to fueling! (more...)*

The "(more...)" links the reader to the full paragraph — the meal — shown above.

### Sample Case Study

On the following page we've assembled the example from each section above into the final version of our case study.

The final word count is about 550 words.

Notice the following points:

- Extensive use of client quotes helps readers relate their own situation and experiences to those of the client in the case study. It also relieves you of some of the burden of writing.
- Plenty of details help make it real to the reader
- A matter-of-fact discussion of how the running experts she consults help their clients improve performance, with enough specifics that readers can imagine how it might work for them
- Emphasis on integrity ("If we had thought her goals were unrealistic..."), not puffery ("We can help anyone, no matter what").
- Proof that the advice Laura got worked for her at Boston and will work for her at Stockholm

Case Study:  
**How An Experienced Marathoner  
Set A New Personal Best At Boston**

Laura bonked at Chicago. Dropped out at Honolulu. And NYC...better not to mention it at all.

### **OUR CLIENT: LAURA MADISON, DENVER, CO**

"I'm not a competitive runner, at least not with other people. What really matters to me is how I do compared to what I think I can achieve. I'm so frustrated because I know I can do better, but I just don't know *how* to do it better."

### **LAURA'S CHALLENGE**

Laura had great experiences in her first three marathons—she did better than she expected, had fun, and wanted to go back for more. It's when she tried to improve her times that the frustration began. "First I thought I needed longer practice runs, but that just caused shin splints. That knocked me out for almost five months back in 2004. Then I came across Chi Running, and it really helped my posture, but not so much my speed. By 2005, I thought maybe I needed to join a club because I was getting frustrated, but I didn't like feeling like an outsider—it distracted me from my running. This year I went back to training on my own, and then I bonked big-time at Chicago. I knew at that point I had to try something new."

We first met Laura through a referral from Jill Warren, a master's runner that she met at Luke's Locker, a running store in Denver.

### **OUR SOLUTION**

Laura came to us for personal coaching on her entire running program. We offer a one-on-one coaching program for runners who are serious about their results. It usually lasts at least nine months. We develop a personalized plan, test it before races, and then work with the client to tweak it after each race based on results. Once the plan's in place, we usually observe a couple of training sessions every three to six months just to spot any potential issues and talk about anything the client thinks needs some attention.

We met with Laura first to talk about her goals and what she had tried so far. If we had thought her goals were unrealistic, we would have told her so. But her goals seemed fine. What was missing was a comprehensive program that combined the physical aspects of training to improve her speed with a new approach to nutrition and fueling, plus we needed to lower her stress level before races.

### **LAURA'S RESULT**

Laura broke her personal best at Boston, thanks to a very structured interval training method, the pre-race checklist we developed and a balanced approach to fueling. We had zeroed in on these items during the six months leading up to the event. "Two things really made the difference at Boston", she says. "Having a pre-race checklist really calmed me down because I knew I wouldn't forget anything, plus I used the relaxation stuff that Amir had worked with me on." We also added some protein and fat to Laura's pre-race meal of pasta, and had her take gels every 30 minutes during the race. Instead of bonking like she did in Chicago, she said "I really felt great, even at the 19-mile mark!".

Laura's new approach to training and nutrition is paying off for her. She's planning on having fun (and finishing in the top 3 in her age class) at Stockholm in June!

## **TITLE**

Include the benefit to the client or customer in the title.

## **OUR CLIENT/CUSTOMER**

### *The Attention-Grabber*

Write an interesting “lead” about your customer or client.

## **HIS/HER CHALLENGE or OPPORTUNITY**

### *Current Situation vs Desired Outcome*

Describe the client’s starting point and the desired outcome. Use the client’s words where possible. Clearly describe the client’s problem or opportunity — either a negative consequence to avoid or a positive outcome to gain. Explain why it matters to them.

### *The Journey*

Describe what they’ve tried previously, why it didn’t work, and how long they’ve tried to fix the problem or capitalize on the opportunity.

### *The Discovery*

Explain how the client found you.

## **THE SOLUTION**

### *Your Program Or Service*

Objectively describe the programs or services offered by you or your business that helped this client reach their goal.

### *The Implementation*

Explain how you implemented your programs or services on behalf of this client. Explain how you resolved any problems that arose.

## **THE RESULT**

### *The Outcome*

Describe the results of your approach and the client’s work. Answer these questions: Did the solution work? What change did it cause? Use a quote from the client if possible.

### *The Recap*

Briefly summarize and conclude the story. End with a reference that shows how your expertise will continue to pay off for your client in the future.