

Zoho Partner Case Study Template

Introduction

A case study is one of the better marketing tools you can use to draw attention towards your business. While testimonials and customer rating do the job of building trust and reliability, an evidence-based case study can further reinforce that.

Case studies help you isolate and probe individual customer problems and illustrate your technical capabilities and Zoho expertise that helped solve them.

Not to mention, case studies add value to your overall tier evaluation score at Zoho. Every case study approved by the Zoho team is worth 10 points and can add a maximum of 50 points to your Partner Score.

Below is a format you can use while creating case studies of your own.

Note:

This is not a definitive format- you can bring in minor alterations to customize this to fit your problem statement.



Here are a few tips before you get started

- Choose a customer with a clear story.
- Frame the right questions for the interview with the customer.
- Make sure to gather quotes that can strengthen your case study.
- Include supporting data and numbers into the case study. This could also be in the form of engaging visuals.

Once published, you can upload your case study on Partner Store and it will be reviewed by our team. Once reviewed and approved, it will appear on your Partner profile on the Zoho Partner Directory. Subsequently, you will be awarded a score to match during the Partner tier evaluation process.

Case Study Template

01 A Descriptive Title Card

Includes-

<Customer Name> "Case Study"

Brief description of the case study

For eg: "Merchant & Co. Case Study

How Merchant & Co. used Zoho Social to streamline their social media strategy."

02 Overview

Provide a summary of the document here. Include-

A brief description of the problem (You don't have to cover this in detail here since it can be covered in detail a little later in the document)

A quick description about the Zoho product that solved the problem.

Key takeaways from the case study

03 Executive Summary

You can add a summary of the customer business here.

the location of the business

a brief history of the business

field and nature of business

other customer business-related information that you think might help set context for your case study

An opening quote from the customer

04

Problem statement and key Challenges

Clearly define the problem that the customer was facing and the reason in this section. You could support it with details about the system the customer had in place, isolate the key challenges from one another, and explain how they were disrupting productivity at the organization.

Add numbers/data- could be data regarding the loss of productivity, etc, to help back up the problem statement.

Insert a quote from the customer organization describing the challenge and how they were affected by it.

05

Evaluation of the problem

This section can will explore how you employed your Zoho expertise to evaluate the problem the customer was facing. You may also include details of how your experts determined the appropriate solution(s) to fill the process gaps within the customer business.

06

Proposed solution(s)

Here you can include details about the proposed Zoho products, its key functionalities and why this product is the best fit for the customer's requirements and how it helped overcome their key challenges.

07

Implementation

In this section, you can illustrate the implementation process.

You can include-

the duration it took to implement the solutions (use this to demonstrate your efficiency as a partner)

bottlenecks, and how you mitigated them

additional services provided- migration and customization, for instance.

Result

Describe in detail how the customer business was impacted after moving to the proposed Zoho product(s). You can add numbers to aid the content. Mention revenue changes, lead conversion, and how the shift helped the customer achieve their objectives/goals better.

End with one more quote that clearly demonstrates the value the customer derives from Zoho products.

<Partner Name>

<Partner Tier logo>

<Email ID/Contact>

<CTA>

