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**Case Study Discussion Guide Template**

1. Agenda and Objectives
2. Introductions
3. Company Bio
   1. How long has your company been around? What led to its creation?
   2. How many employees do you have now? How many on your team?
   3. What differentiates your product/service from your competitors?
4. The ‘Before’ Picture
   1. What were the main challenges you were trying to overcome?
   2. How were these challenges impacting your business?
   3. Had you attempted to solve this problem in the past? If so, what were the results?
   4. What were your desired goals?
   5. What KPIs were you using to measure your success?
5. Deciding to Work with Your Company
   1. What prompted you to make a change?
   2. Why our company versus a competitor?
   3. How did you convince leadership to make this change?
6. The ‘After’ Picture
   1. What were your initial expectations? Were those expectations met or exceeded?
   2. What was the implementation process like?
   3. What is it like working with our team?
   4. How do you define and measure the success of our partnership?
   5. How soon did you start seeing results, and what did those results look like?
   6. Why do you continue doing business with us?
   7. Were there any specific experiences that stood out to you as a major win?
   8. What about our company would make you recommend us to others?
7. Is there anything else you’d like to share?
8. Thank you and next steps