Case Study Template

Turn one program's results into a documented, finance-ready case study.

This template walks you from baseline to published case study for one named program. Set aside 5–10 minutes, answer honestly rather than optimistically, and total your 1–5 ratings at the end.

NAME & ROLE | COMPANY / TEAM | DATE

Section 1: Frame the Story

Rate each statement 1–5, where 1 means strongly disagree and 5 means strongly agree.

Rating: 1 = strongly disagree · 3 = neutral · 5 = strongly agree

We can name the program, the team and the month the intervention ran.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

A reader outside L&D could repeat the program using only our description.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Write the one-sentence context: company profile, team size and the trigger moment.

☐ We have a verifiable quote from a manager, not just an adjective.

Our context section states a real company size instead of a vague leading manufacturer.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

We know exactly which reader this case must persuade — finance, HR or operations.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Section 2: Lock the Metrics

Baselines come from systems, not from memory — this section tests that.

Rating: 1 = strongly disagree · 3 = neutral · 5 = strongly agree

We have a baseline captured before the program, with a date on it.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Every metric we plan to report lives in a system someone else can open.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

We limited ourselves to two to four metrics rather than reporting everything.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

☐ Each metric has an honest re-measure window written down, not just a hope.

List your two core metrics and their baseline values (for example: mis-picks 22 per 1,000 orders).

We re-measure weeks or months later, never on the day the workshop ends.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Section 3: Convert and Draft

Dollars, isolation and the haircut — where most case studies get honest.

Rating: 1 = strongly disagree · 3 = neutral · 5 = strongly agree

We use replacement costs and loaded hourly rates finance already accepts.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

The rate used on every dollar line is printed next to that line.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

We applied an isolation method — comparison group, trend line or stated contributing factors.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

☐ We took an attribution haircut and report the defensible number, not the raw one.

Write your raw benefit total $___ and your defensible benefit total after the haircut $___.

The assumption list sits inside the document, not in a hallway conversation.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

Section 4: Scoring & Next Steps

Total your twelve ratings, then commit to the actions below.

Your total score (add your 1–5 ratings): ___ / 60

- ☐ I will draft the results section before the context section this month.
- ☐ I will cut a one-page finance version and a three-line deck version from the same draft.
- ☐ I will book the free strategy call at funnelsthatsell.com to pressure-test my draft.

How to read your score

45–60	Your case is built on records and rates — draft it, take the haircut in public, and put the one-pager in front of finance.
30–44	The story exists but the evidence is thin — pull the baseline from a system and add the isolation note before showing anyone.
0–29	You have a testimonial, not a case study — schedule the baseline pull now and write the document next quarter when the after-number exists.

YOUR NEXT STEPS

1. Pick one program and pull its baseline from a system finance can audit, with a date attached.
2. Draft the results section first, convert two buckets to dollars, and add the isolation note and haircut.
3. Book your free strategy call at funnelsthatsell.com and we will pressure-test your draft before finance sees it.

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Sources: Training magazine 2023 Training Industry Report; LinkedIn Learning 2018; Gallup 2015; worked-example figures illustrative.

Thank you for completing this assessment — share it with a colleague who needs it.