

# How to Create a Case Study with AI

A simple step-by-step method + ready prompts ✓

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# Why This Matters

- ▶ A strong case study begins with the real customer story.
- ▶ AI helps turn the story into a polished asset — but only with the right input.

# Step 1: Material Collection

Goal: Build a solid foundation with high-quality inputs.

What to do:

- Interview the customer
- Bring PM / SE / PS if helpful
- Ask structured questions
- Record the meeting (Zoom/Teams)
- Generate an accurate transcript
- Provide a case study example so the AI understands the structure + tone
- Collect technical documentation about the product (datasheet , solution brief) that is relevant for the product
- Name all files clearly (Transcript XX, Solution Brief\_xx)

▶ Prompt:

```
I will provide transcript text + product documents + a case study example. Do not write anything yet. Only confirm you received the materials. Do NOT add or invent any information.
```

# Step 2: Initial Filtering

Goal: Remove noise and extract only relevant insights.

▶ Prompt:

```
From the transcript, extract ONLY:  
the customer's problem  
the customer's needs  
what they evaluated/tested  
pain points mentioned  
solution elements explicitly referenced  
Do NOT include: [Add here the list of info you don't want included]  
Return clean bullet points. Do NOT rewrite or summarize yet.
```

# Step 3: Map to the Case Study Structure

Goal: Organize the extracted content according to the structure of your example.

► Prompt:

```
Map each extracted bullet into the structure of the case study example I provided.  
Do NOT rewrite the content. If a new section seems relevant – suggest it, but do NOT draft it yet.
```

# Step 4: Marketing Rewrite

Goal: Turn the mapped bullets into clean, polished marketing language.

▶ Prompt:

```
Rewrite each section into clean, concise marketing language. Follow the tone and style of the case study example. Do NOT invent details. Use ONLY the mapped content.
```

# Step 5: Quality Control

Goal: Ensure accuracy, consistency, and compliance.

► Prompt:

```
Review the draft Case Study. Fix:
```

- invented details
- identifying information
- inconsistencies
- unclear or generic phrasing
- long sentences
- repetition
- flow between paragraphs
- Keep all facts exactly as given.
- Return only the corrected version, with no explanations.

# Step 6: Formatting

Goal: Prepare the final, publish-ready document.

▶ Prompt:

```
Format the final Case Study with:  
• clear section headings (based on the example)  
• proper spacing  
• bullet lists where needed  
• consistent style across sections  
Do NOT change the content.
```

# That's It!

- ▶ Your complete, AI-powered, repeatable method for creating strong customer case studies — every time.