Case study training

This training introduces where to locate and update case study requests, how to use and edit the case study template, and where to save case studies.

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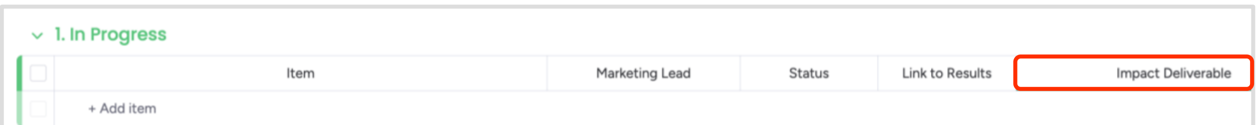
Access the full case study

Go to the [Case Study Tracker] and locate the **Inbound** group.

Add yourself as the **Marketing Lead** and update the **Status** to **1. In Progress.**

The item then populates to the **1. In Progress** group.



Click on the link in the **Impact Deliverable** column to open the measurement recap.

Review the recap deck

Review the measurement recap deck and determine if the campaign is good enough to flip into a case study.

If **yes**, locate three stats that align with the goal of the campaign: choosing stats as low on the marketing funnel as possible but still successful.

If **no**, update the status in Monday with the corresponding issue (e.g., **On Pause**, **Details Needed**, **Needs edits**, **No Access**).

Flip into template

Open the Case study template.

Position your best stat as the largest number and your secondary stats as the two smaller numbers.

Update the following:

- **Name of product**
- **Headline**

- Imagery to align with the category
- Colors in the slide to complement the imagery

Note: For guidance, look to previous case studies.

Save in SharePoint

In SharePoint, save the case study to **6. Case Studies**.

Update Monday

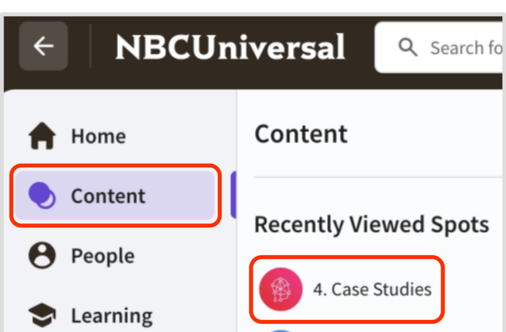
Update the status of the case study to **2. Ready for Review**.

Send the case study slide to team member to review and update the status to **3. Out for Review**.

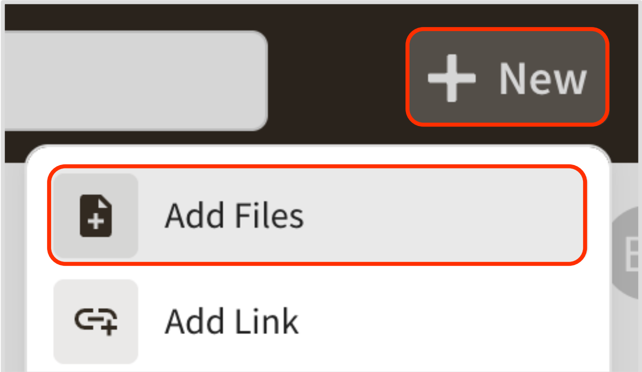
Once reviewed, upload the case study to Highspot.

Upload to Highspot

In **Highspot**, go to **Content**, and select **4. Case Studies**.

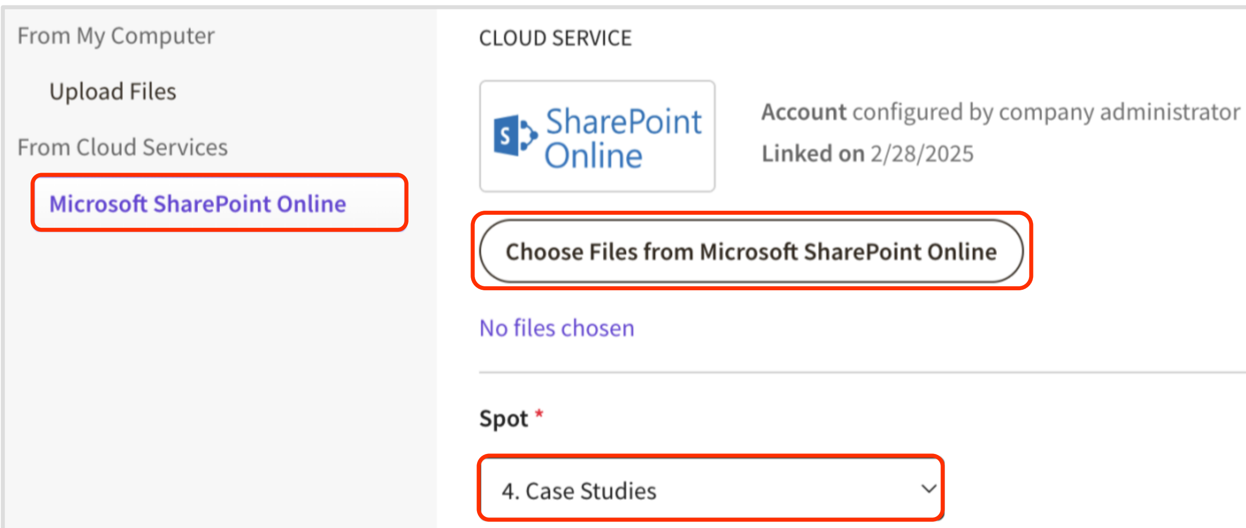


Click on **+New** at the top right of the page and select **Add Files**.



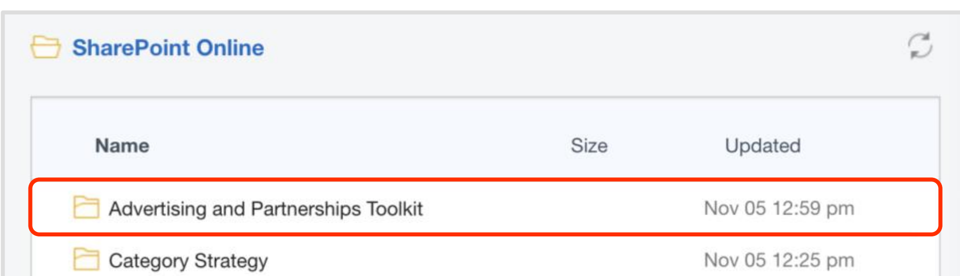
The **Add Files to Spot** dialog box opens. Click on **Microsoft SharePoint Online** below **From Cloud Services**.

Note: Make sure **4. Case Studies** remains selected for the **Spot** drop-down.



Click on **Choose Files from Microsoft SharePoint Online** and the **SharePoint Online** dialog box opens.

Click on **Advertising and Partnerships Toolkit**.



Select **Shared Documents**.

Name	Size	Updated
FormServerTemplates		Mar 07 3:10 pm
hubsite		May 16 1:47 pm
Leadership Conference March 2022		Mar 23 5:08 pm
Shared Documents		Sep 05 1:47 pm
SiteAssets		Feb 13 3:00 pm

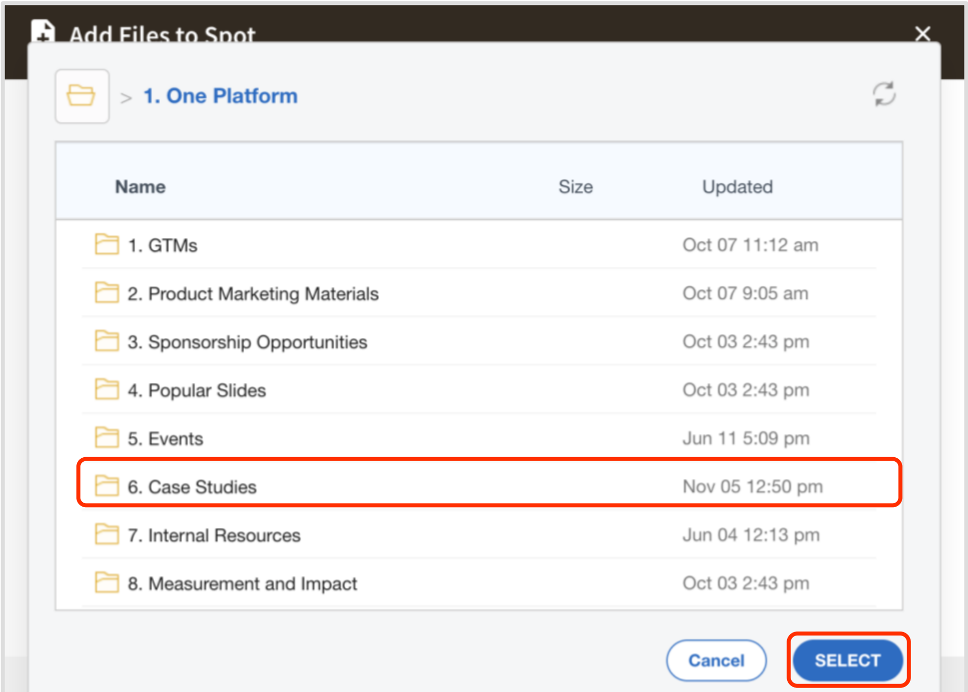
Select **Sales Materials and Resources Documents**.

Name	Size	Updated
2023		Oct 26 7:57 am
Commerce GTM		Mar 13 10:45 am
HBCU Package 2022		Aug 02 12:15 pm
House		Oct 26 7:54 am
JEG Working Docs		Feb 03 4:46 pm
Leadership Conference 2022		Mar 23 5:16 pm
Partner-Specific Materials		Apr 23 3:10 pm
Sales Materials and Resources Documents		Oct 13 2:09 pm

Select **1. One Platform**.

Name	Size	Updated
1. One Platform		Jun 11 5:09 pm
2. Brands and Partnerships		Apr 01 12:02 pm

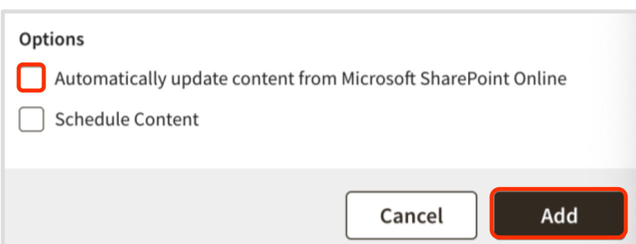
Select **6. Case Studies**.



Choose the case study you want to upload to HighSpot from the list.

Click the **Select** button, taking you back to the **Add Files to Spot** dialog box.

Under **Options**, select the **Automatically update content from Microsoft SharePoint Online** checkbox.



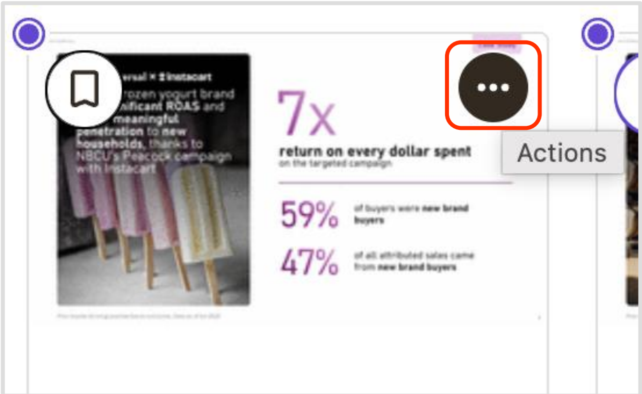
Click **Add**.

Update Properties in Highspot

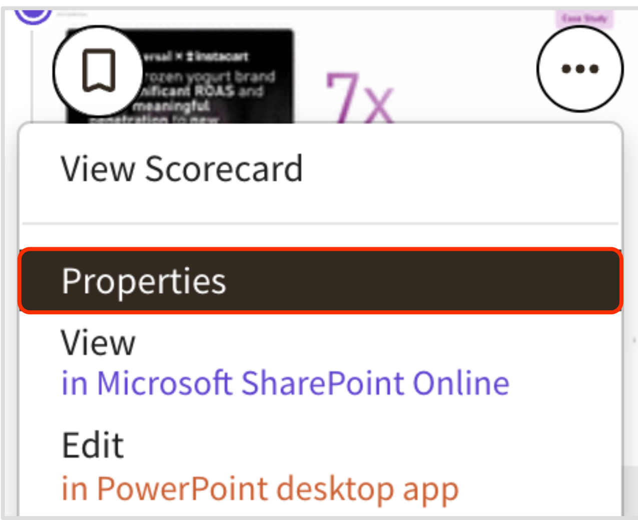
To add Properties to your case study:

In [Highspot](), go to **Content** and select **4. Case Studies**.

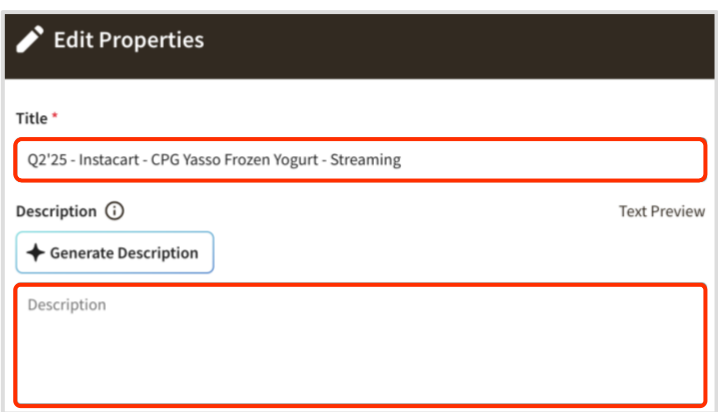
Click on the **ellipses** (**Actions**) button at the top right of the case study.



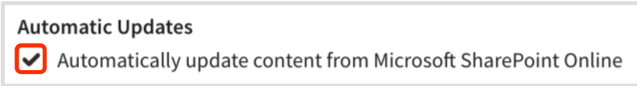
Select **Properties**, opening the **Edit Properties** dialog box.



Complete the **Title** and **Description** fields.



Under **Automatic Updates**, select the **Automatically update content from Microsoft SharePoint Online** checkbox.



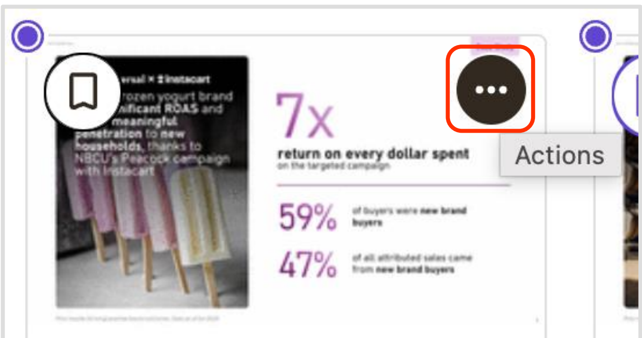
Click **Save**.

Tag in Highspot

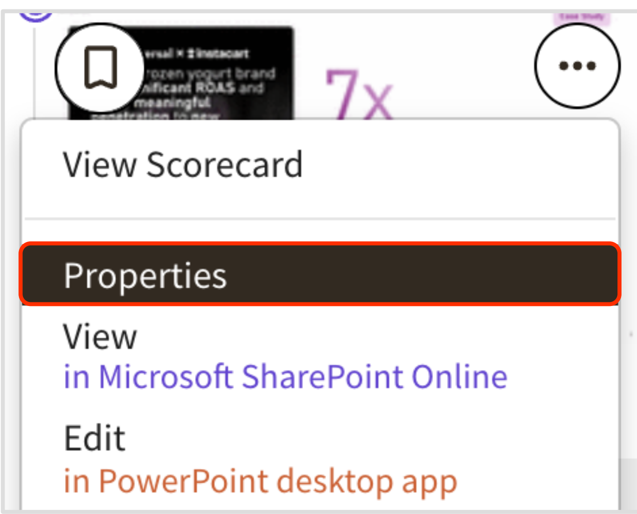
To add Tagging to your case study:

In [Highspot](), go to **Content**, then select **4. Case Studies**.

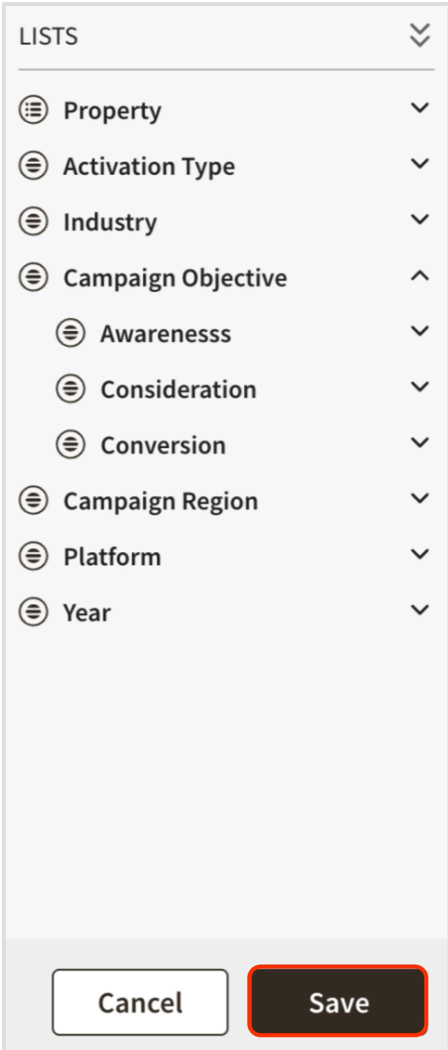
Click on the **ellipses** (**Actions**) button at the top right of the icon.



Select **Properties**, opening the **Edit Properties** dialog box.



In the **Lists** panel at the right, complete the tagging for the following fields: **Activation Type**, **Industry**, **Campaign Objective**, **Campaign Region**, **Platform**, and **Year**.



Click **Save**.

Update Monday (again)

In **Monday**, update the status of the case study to **4. Tagged on Highspot**.