

Sample email to begin stakeholder interview scheduling

Hi [STAKEHOLDER NAME],

[CLIENT] has engaged Forrester Research to write an ROI-based case study titled: The Total Economic Impact Of [CLIENT] [PRODUCT].

The first step in this process is for our Forrester contacts [CONSULTANT] and [ASSOCIATE CONSULTANT] to interview [PRODUCT] stakeholders who can provide them with more insight into the solution, from an overview of the customer value proposition (cost and benefit categories), to any sales and marketing challenges, and any perceived customer objections (which the study will try to mitigate).

I have selected the set of you as the best collection of staff to give [CONSULTANT] and [ASSOCIATE CONSULTANT] the complete picture. They will be contacting each of you soon to schedule individual 45-60 minute phone interviews.

If you have questions or would like additional information on the overall Forrester project, please let me know.

Thanks,

[YOUR NAME]

Sample email to recruit customers for interviews

Hi [CUSTOMER NAME],

We have an opportunity for you to be interviewed by a Forrester Research consultant for a Total Economic Impact™ case study they are doing for us. I wanted to run this by you because of your use of [CLIENT] [PRODUCT].

Please let me know if this is something you would like to support. Your answers would be anonymous, and your company will not be identifiable from the case study. Most interviewees come away from these interviews thinking "Wow, I hadn't thought about quantifying certain benefits that we're getting from the solution. This gives us additional insight into the financial impact of the technology on our company."

You would receive the interview questions prior to the 60-minute audio interview. Those questions are designed to help Forrester understand the economic costs and benefits associated with your company's investment in [CLIENT] [PRODUCT]. They will help Forrester understand your company's environment prior to the [CLIENT] [PRODUCT] investment, the drivers to make the investment, and how [CLIENT] [PRODUCT] has impacted your organization. Forrester will ask about the top quantifiable economic benefits your company has experienced from its investment in [CLIENT] [PRODUCT], compared to the company's prior environment.

Here's a [Customer Participation Guide](#) that explains benefits of participating in this case study and more information about what's involved. Or, take a look at this [3-minute video](#).

Happy to jump on a quick call to answer any questions or provide additional information. Please let me know.

And thanks for your continued support.

[YOUR NAME]

Sample email to introduce customer to Forrester for customer interview scheduling

Hello [CUSTOMER NAME],

Thanks again for agreeing to be interviewed for the Forrester Research case study. [CLIENT] has engaged Forrester to develop an ROI-based case study that will evaluate and detail the costs and benefits of [CLIENT] [PRODUCT]. Forrester's interview will include a discussion of your reasons for choosing [CLIENT], and your organization's costs and quantified benefits attributed to the solution.

In creating this case study Forrester will be using its Total Economic Impact™ methodology which examines costs, benefits (both tangible and intangible), risks and risk mitigation, and future flexibility options related to [PRODUCT].

The next step in this process is for our Forrester contacts [CONSULTANT] and [ASSOCIATE CONSULTANT] to interview you via telephone. [CONSULTANT] and [ASSOCIATE CONSULTANT], who are copied above, will be contacting you shortly to schedule a 60-minute recorded (audio) phone interview. Their goal will be to help you through the interview process.

If you have questions or would like additional information on the overall Forrester project, please let me know.

Thanks again for your participation!

[YOUR NAME]