THE QUIET PROTOCOL
AI SYSTEMS & AUTOMATION

Case Study Capture Playbook for Small Businesses

Capture completed work with an interview guide, evidence sheet, publication approvals and a clear case-study structure. Free playbook for small businesses.

Owners, operators, marketers, and client-facing teams responsible for turning real work into usable proof

GUIDE

Picture the end of a good job. The customer is pleased, the team is packing up and someone says, “We should put this on the website.” A month later, the useful photos are on three phones and nobody remembers what changed.

Capture the story while the people and records are still available. This playbook gives you an interview, an evidence sheet and a draft structure. The aim is a story the next buyer can inspect and understand, with the right approval before anything goes public.

CHOOSE A STORY THAT ANSWERS A BUYING QUESTION

Start with a question you hear before a sale. Can you work around an occupied home? Can you replace a confusing booking process without changing the practice software? What happens when the original plan is not suitable?

Choose completed work that answers one of those questions. A small, well-explained job can be more useful than a large project described only as “a great success.” You need a clear starting problem, a record of what was done and something you can show afterwards.

Write a working brief:

- Reader: who needs to make this decision?
- Question: what uncertainty should the story resolve?
- Work: which completed job or delivery are we documenting?
- Evidence owner: who can locate and explain the records?

- Publication owner: who checks the facts and obtains the required approvals?

Do not collect private details just to make the story more dramatic. Keep the raw records in the business's approved storage. The public story should contain only what helps the buyer and is cleared for publication.

CAPTURE THE STARTING POINT

Save the original scope, the customer's stated problem and the conditions that affected the work. Record dates and what was already in place. Separate what the customer told you from what your team directly observed.

For a home-service job, useful material might include an approved condition photo, the selected repair and a note about site access. For a law firm or clinic's administrative improvement, show the booking or reception process using approved demonstration data. A person's legal matter or treatment is not needed to explain a better administrative process.

If no reliable baseline exists, say so in your working notes. You can still explain the work and show the delivered result. You cannot calculate an improvement from a starting number you do not have.

INTERVIEW THE PEOPLE WHO KNOW THE WORK

Ask the person who delivered the job first. They can help you avoid a polished story that leaves out the decision that mattered. Use these questions as a conversation, not a script that forces a positive answer.

1. What was the customer trying to do before they contacted us?
2. What did we find when we inspected the job or reviewed the process?
3. What options did we consider, and why did we choose this one?
4. What did we actually deliver? What remained outside our scope?
5. Which detail made the work harder or changed the original plan?
6. What can we demonstrate or verify now?
7. What is still unknown, unfinished or dependent on someone else?

Then, where appropriate, ask the customer:

- What was most difficult before the work began?
- What changed in your own experience?
- Which part of the work would help someone choosing a provider understand us?
- Is there anything in our draft that sounds wrong or overstates the result?

Save the customer's exact words separately from your summary. If you edit a quote for length or clarity, send the edited version back for approval. An enthusiastic conversation is not automatically permission to publish a name, photograph or testimonial.

BUILD THE EVIDENCE SHEET

Each important statement needs a record behind it. Use this sheet before writing the headline.

Statement to check	Supporting record	What it establishes	Limit or missing context
[What we plan to say]	[File, date and owner]	[Observed delivery or result]	[What it does not prove]
[What we plan to say]	[File, date and owner]	[Observed delivery or result]	[What it does not prove]
[What we plan to say]	[File, date and owner]	[Observed delivery or result]	[What it does not prove]

A completion photo can show the finished work. A test record can show that a configured enquiry reached the agreed destination. A customer quote can describe that person's experience. None of those automatically proves a revenue increase.

If you publish a numerical comparison, keep the underlying definition and dates. Count the same thing before and after, use comparable periods and note other changes such as advertising, staffing or seasonality. Keep the original counts beside any percentage. Where the records show a change but do not isolate its cause, describe the change without claiming that your work caused all of it.

CLEAR THE MATERIAL FOR PUBLICATION

Send a review copy with the exact text and images, the proposed attribution and the places you want to use it. Ask the authorized reviewer to approve that version. Record the approval date and any restrictions. This working record does not replace the business's agreements or professional review.

Material	Proposed public use	Authorized reviewer	Approval or restriction
Text and customer attribution	[Page or channel]	[Name or role]	[Approved version and date]
Photos or screenshots	[Page or channel]	[Name or role]	[Approved items and exclusions]

Material	Proposed public use	Authorized reviewer	Approval or restriction
Quote or testimonial	[Page or channel]	[Name or role]	[Exact approved wording]

Look beyond names when checking a screenshot or photograph. Addresses, faces, account identifiers, appointment details and distinctive circumstances can reveal more than the caption suggests. Removing a name does not itself establish permission or make a story safe to publish.

For law firms and clinics, have the responsible professional approve the proposed material before publication. When a customer story is unsuitable, a clearly described process walkthrough or demonstration may answer the buyer's question without exposing the underlying matter or patient record.

WRITE A SHORT STORY THE BUYER CAN FOLLOW

Use this structure. Fill the fields with the approved facts; remove any section you cannot support.

OPENING: THE SITUATION

[Business or customer description approved for use] needed [specific job]. The difficulty was [constraint]. They wanted [clear, realistic objective].

DECISION: WHAT WE CHOSE AND WHY

We reviewed [relevant conditions or options]. We chose [approach] because [reason]. The agreed work covered [scope]. It did not include [important boundary].

DELIVERY: WHAT CHANGED

We completed [observable work]. [Approved photograph, demonstration or record] shows [what the evidence actually establishes]. The detail that mattered was [specific decision or execution detail].

RESULT: WHAT WE CAN SHOW

The verified result was [supported outcome, with date or measurement window where needed]. [Approved quote, if available.] [Material limitation or unresolved item.] Explain the result in ordinary language before adding a number or a technical term.

NEXT STEP: WHO THIS HELPS

This approach is relevant when [buyer situation]. A different approach may be needed when [constraint]. Link to the service that solves that problem and explain what the next conversation covers.

A strong headline names the work or decision. “A clearer booking route for new consultations” tells the reader more than “Another amazing transformation.” Make the story easy to scan, but keep the details that let someone judge the work.

PUT IMAGES TO WORK

Choose images that explain the job: the relevant starting condition, an important decision or the delivered work. Keep a consistent viewpoint for a before-and-after pair when possible. Do not imply that unrelated pictures show the same project.

Write a caption that says what the reader is seeing and why it matters. Write useful alternative text for an informative image; keep a purely decorative image's alternative empty. For a screenshot, explain the meaningful result in page text so it is not available only inside the image.

Keep approved originals and a publication copy. Remove private details before upload, check the image at phone size and avoid shrinking a full software screen until none of its labels can be read.

PUBLISH ONCE, THEN MAINTAIN IT

Give the full story one useful home. Link to it from relevant service or proof pages where it helps the buyer's decision. Use a short, accurate excerpt elsewhere rather than copying the full story onto several near-identical pages.

Before publishing, check:

- The opening answers a real buying question.
- The scope, evidence and result agree with one another.
- Names, images and quotes match the approved version.
- Sources and related service links open correctly.
- Mobile reading, image alternatives and the next step work.
- Someone owns corrections and future updates.

After publication, keep the evidence and approval record with the page address. Review the story when the offer, process or permission changes. Ask the sales team whether it answers a recurring question and whether prospects use it to make a better decision. Page views alone do not show that it helped win a suitable customer.

WHEN YOU WANT THE WEBSITE BUILT AROUND THE WORK

The Quiet Protocol builds professional websites (https://www.thequietprotocol.com/professional-website) and connected Smart Websites (https://www.thequietprotocol.com/solutions/smart-websites) for service businesses. Bring your approved material and the questions buyers ask. We can organize the agreed evidence, service

explanation and enquiry route into a website that makes your work easier to assess.

SOURCES AND SCOPE

The FTC's endorsement guidance (https://www.ftc.gov/business-guidance/resources/ftcs-endorsement-guides-what-people-are-asking) explains US advertising considerations for endorsements, material relationships and result claims. Use the requirements that apply to your business and location; this worksheet does not provide legal clearance.

Google's people-first content guidance (https://developers.google.com/search/docs/fundamentals/creating-helpful-content) supports useful original information and demonstrated experience. This playbook's interview, evidence sheet and publication workflow are TQP's practical method. They do not guarantee rankings, AI citations or sales. Sources checked October 22, 2026.