

Bringing your messages to life: working with clients as case studies

Publicising the work of your agency in the media is an important way of raising your profile; helping people to understand the variety and breadth of the work you do and also drawing attention to any issues you campaign and lobby on. You probably spend little, if any, money on advertising, so securing free editorial in newspapers, online and on the television and radio is a vital means of getting your message across.

The impact of media coverage is far greater when the voices of clients are heard directly, and the vast majority of media requests require an element of 'case study' involvement.

Giving clients a voice

A client talking directly about the issues they've faced can bring alive an otherwise dry news story and give it a human element. It helps people experiencing similar issues to understand that they are not alone, and lets them know that your agency is there to help people just like them.

Media opportunities are also a way for advice agencies to give clients – where appropriate – a voice. There are issues of sensitivity and there will be times when it's not suitable for a client to talk to the media; they might not want to, or you may feel they are not suitable. However, if in doubt always give them the option – never assume that a client wouldn't want to go public on their issues, it's up to them! Managed properly it can be a beneficial experience all round.

When requests might occur

The media want advice agencies' involvement in all sorts of stories and more often than not they ask for a client case study. Currently, the majority of requests are for people who have lost their homes, lost their jobs and/ or are struggling with debt issues.

Whenever you receive requests such as these, you should always strive to provide a positive angle. Even if your agency hasn't helped a client to completely resolve their issue, it's likely you will have helped them manage it better, or helped buy them some time. Make sure you do all you can to get this point across.

Aside from the most topical subjects, requests from the media can be about all manner of things. Always try and help as long as it's something your agency is concerned about. You may, however, choose not to provide case studies unless you get at least a mention in the piece, but preferably also an expert opinion, or reference to the work you do around that issue.

Sometimes the Press Office of your national network may contact you to find clients because they are preparing to publicise a report and/ or put out a press release. They will probably come to you seeking help to line up one or more clients in advance, who can represent the issues they are highlighting and demonstrate why any changes they are calling for are necessary.

Requests may come direct to your agency from local media asking for case studies, but you should contact your national Press Office – or ask the journalist to – if national media make contact and haven't cleared the request through the Press Office first.

How to approach the client and prepare them for media work

It is important when approaching a client about media work that you are armed with full knowledge about the level of involvement and expectations of the journalist, or your own expectations if it's linked to a report launch or press release.

Clients should be presented with all the advantages and possible disadvantages of sharing their story, be assured that there is support from your agency throughout the process if needed, and also be clear on when and how journalist is likely to make contact.

They should be encouraged to think about how any media attention might affect them personally as well as their families. But also how taking part will be beneficial both to the organisation and others facing similar situations.

They should be made aware of the possibility that only a small part of the interview may eventually appear, or that it may not in the end be used at all.

Below are some key points to help you through approaching and preparing a client for a media interview:

- 1) Explain the need to approach them e.g. "We received a call from BBC Radio 4's Money programme, and they are putting a programme together on mortgage repossessions..." or "We are writing a report on debt, and your adviser suggested you..."
- 2) Explain how the client can help e.g. "We know that you have experienced similar problems and sharing your story could help others find out where they can turn and what action they can take..."
- 3) Ask them to lead you through the story. Even if you know it already from the case notes, it will help you gauge how effective this client will be on radio or TV, or in print. Note down any significant events and dates, also any particular comments they make that you think sum up what they are going through. A journalist will appreciate this information in advance.

- 4) Don't rush them, and be sympathetic. Clients can be exhausted from trying to sort their issues, or angry they have ended up in this position.
- 5) Once they've relayed their situation, ask again how they feel about telling their story on radio/ TV/ to a print journalist.
- 6) If they aren't happy with being involved find out why. If they have a problem with TV you could ask if radio or print would be easier, in case of future enquiries.
- 7) If they say no to print, because they are worried about anonymity offer alternatives i.e. silhouette photo, first name only.
- 8) However, never force the issue. If they say no, be easy going and understanding. They might change their mind, and you can always find someone else.

