

Case Study Proposal

Private and Confidential

1. Purpose of This Proposal

This **Case Study Proposal** (the "**Proposal**") outlines the scope, process, and terms under which _____ ("**Company**") proposes to develop a written and/or multimedia case study featuring _____ ("**Client**"). The purpose of the case study is to document and present the Client's experience with the Company's products or services for marketing, educational, and promotional use, subject to the Client's review and approval as described below.

This Proposal is intended to describe a potential collaboration and does not create a binding obligation unless and until both parties expressly agree in writing.

2. Background

The Company has provided certain products or services to the Client, resulting in measurable outcomes, improvements, or use cases that may be suitable for inclusion in a case study. The Company seeks the Client's cooperation to document these outcomes in a structured and professional format.

3. Scope of the Case Study

Subject to Client approval, the case study may include the following elements:

- A general description of the Client's business or organization
- The challenges or objectives faced by the Client prior to engaging the Company
- The products or services provided by the Company
- The manner in which the Client implemented or used those products or services
- Outcomes, results, or benefits achieved
- Quotations, testimonials, or statements attributed to authorized Client representatives
- Visual materials such as logos, screenshots, or approved images, if applicable

The final format may include written content, visual design elements, or digital publication formats, as agreed during the process.

4. Client Participation and Cooperation

The Client's participation may include reasonable cooperation such as interviews, questionnaires, review of drafts, and factual verification. The Client is not required to disclose confidential or proprietary information and may decline to provide any information it considers sensitive.

5. Review and Approval Rights

Prior to publication or external use, the Company will provide the Client with a draft version of the case study for review. The Client may request reasonable revisions to ensure factual accuracy and to protect confidential information. Approval will not be unreasonably withheld or delayed.

No case study will be published or distributed without the Client's written approval of the final version.

6. Use of Client Name and Materials

Upon approval of the final case study, the Client grants the Company a non-exclusive, royalty-free right to use the approved case study content, including the Client's name and logo as presented in the approved version, solely for the purposes described in this Proposal.

Any use beyond the approved content or purpose will require additional written consent from the Client.

6. Use of Client Name and Materials

Upon approval of the final case study, the Client grants the Company a non-exclusive, royalty-free right to use the approved case study content, including the Client's name and logo as presented in the approved version, solely for the purposes described in this Proposal.

Any use beyond the approved content or purpose will require additional written consent from the Client.

7. Confidentiality

Information identified by the Client as confidential, or that reasonably should be understood as confidential, will not be included in the case study and will not be disclosed without the Client's prior written consent.

8. No Compensation

Unless expressly stated otherwise in writing, the Client's participation in the case study is voluntary and no monetary compensation is provided. Any agreed incentives, discounts, or other consideration must be documented separately.

9. Non-Binding Nature of Proposal

This Proposal is for discussion and planning purposes only. Except for confidentiality obligations and any expressly stated rights regarding review and approval, this Proposal does not create a binding agreement or obligate either party to proceed with the case study.

10. Governing Law

Any dispute arising out of or relating to this Proposal will be governed by the laws of _____, without regard to conflict of law principles.

11. Validity Period

This Proposal remains open for acceptance until _____, after which it may be withdrawn or revised by the Company.

12. Acceptance and Acknowledgement

By signing below, the parties acknowledge that they have reviewed this Proposal and agree to proceed with the case study under the terms described above, subject to final written approval of the case study content.

Company

Name

Date

Signature

Client

Name

Date

Signature



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