

Notes on the Case Method

What is a Case Study?

Cases are based on actual situations that managers in real companies have faced. You will assume the role of the manager: determine the problem, analyze the situation, decide on what you would do, and support your conclusions. Cases are designed to improve your ability to make effective decisions; they are vehicles for experience. You will be exposed to a variety of issues in various cases.

A case study involves the following:

- Individual analysis and preparation
- Group discussion and report preparation
- Class discussion

How to Analyze a Case

Thorough preparation on the part of all class members is essential; reading the case is not enough. Effectiveness of the case study / discussion is proportional to the thoroughness of your preparations. If you take the easy way out by just skimming the case and hoping that the group will somehow prepare the case, you will lose the opportunity to practice the skills you wanted to obtain from this school.

There is no ideal way to approach a case, and you can develop your own way of analyzing the case studies. Here is a guideline to begin with:

1. Read once quickly to get the broad pattern. What is the case about? What type of information is available?
2. Read again for detail to develop your understanding of the situation confronting the individuals in the case. Make any notes you find helpful and mark up the case to facilitate structuring your understanding of the situation. It is helpful to take the viewpoint of a marketing consultant. Consider the following:

Problem Identification: What are the major issues and decisions to be made? Which one needs the most immediate action? Is it a threat, opportunity, hidden difficulty?

Situation Analysis: Analyze the problem in pieces -- some pieces may not be provided or may be irrelevant for the case:

- Company information (e.g., objectives, strategy, structure, constraints, strengths, weaknesses)
- Environment (e.g., demographic, economic, technological, media, threats, opportunities)
- Market (what benefits do buyers seek? what information do they have? how do they search? who makes the decision, who influences the decision? level of involvement in the purchase / product?)
- Competition
- Channel members (suppliers, distributors)

Basically, you examine the evidence available to make the decision. You need to consider whether the evidence is reliable.

3. Do the appropriate quantitative and qualitative analyses. Make assumptions if needed, but make sure that they are reasonable and defensible. You may need to run additional analyses for solution alternatives in step 4.

4. Conceive alternative solutions to the problem and identify the advantages and disadvantages of each. Think about the implementation issues and what can realistically be done. Can you convince others that your approach is the best? Deciding on one of the solutions as your recommended course of action requires interaction among group members. Remember that “no action” is always an option.

You may be provided with discussion questions; these are suggested to help you focus on certain aspects of the case. Your instructor is not doing your job of identifying the problems in the case. You must ask yourself “what are the real problems that need to be resolved?”

Case developers attempt to describe enough of the background and details; however, do not be surprised if you feel that the case lacks some facts that you would like to have. Management decisions often must be made on the basis of only the facts which are on hand, and these facts may not be as complete and organized as desired.

How to Write a Case Report

Cases are group assignments; but, keep in mind that the reports should be prepared without collaborating with other groups in the class.

Case reports should be written in essay style -- not “outline”. Try to write clearly and concisely, and support your arguments. Proper grammar and correct spelling are essential! Do not hand in something that has not been proof-read. Presentation as well as content is important.

Please pay special attention to organization. Usually in preparing the analysis of a case, you will develop insights about “parts” of the case before you see the “whole”. But once you see how it all fits together, organize the pieces so that there is a clear, logical flow. Do not hand in a draft, or simply piece together sections written by different people. You will be evaluated on how well points are integrated and communicated as well as on the content of the points.

Suggested Structure:

- Introduction / Statement of the Problem: Be very brief and concise. State the problem(s) the decision maker faces. State, very briefly, what has caused problem(s), the players involved and their roles are.
- Situation Analysis: This is where you go into more detail regarding the causes of the problem as you see them. Why is the company in this situation? What issues need to be resolved for a successful outcome? What is the environment facing the company? Relevant facts in the case should be stated here. Actors in the case may have identified problems and causes, but are these the *only* ones? Do not simply present history from the case. Remember that the instructor has also read the case. State important facts, especially the ones related to any recommendations you make.
- Evaluation of Alternatives: Consider alternative solutions to the problem. Does the case present all alternative courses of action? Can you offer a new / different course of action? Identify the advantages and disadvantages of each solution. Think about the implementation issues and what can realistically be done.
- Recommendations: Based on the above analysis, state your recommended course of action. *Justify your solutions!* That is, support your recommendations by referring to factors in the case which bear on your decision. You may also produce quantitative evidence to support your recommendations. *Evaluate your solutions.* What are the positive or negative consequences of your recommended actions? Never there is one solution that is perfect in every way.
- Appendix / Exhibits: If needed.

Common Mistakes to Beware

1. Rehashing the case.
2. Sloppy presentation, lacking thoroughness.
3. Focusing on minor issues or symptoms.
4. Uncritical acceptance of case data.
5. Incomprehensible, excessive, or unnecessary exhibits.
6. Inadequate analysis: fails to isolate fundamental causes of problems in the case; lacks thoroughness; incorrect; fails to draw upon theories, concepts, or analytical devices presented in class where these are relevant.
7. Not organizing into sections (introduction, situation analysis etc.); answering only the questions provided by the instructor.
8. Unstated or unreasonable assumptions: State and justify anything you assume or claim.
9. Unclear or no recommendations: Do not provide recommendations that spring from nowhere. Make explicit links between recommendations and evidence in the case.
10. Making recommendations without consideration of any possible negative consequences: Nearly all courses of action have some flaws. Being creative does not rule out being realistic.
11. Ignoring unchosen alternatives.
12. Claiming lack of information as basis for no action: If you must have information to make a recommendation, demonstrate the value of that information (e.g., what you need and why, how you will get it, time and money costs of gathering information, etc.). Remember that you are not allowed to use information pertaining to the period after the date of the case.

What Happens in the Class?

The instructor will usually let the class members discuss. While the instructor may suggest the pros and cons of a particular decision alternative, only occasionally she or he will give their views. Instructor may present a framework on the board or document the discussion to help organize your thoughts. Instructor's role is to facilitate the discussion, ask questions, sometimes play the devil's advocate, follow up on members' reasoning, and highlighting issues. You will benefit most if you actively participate in the discussion. If you have an experience that is related to the topic, please share it. Towards the end of the class discussion, the instructor will summarize the discussion and draw out useful lessons and observations from the case study.

Class members will not necessarily reach a consensus at the end of the class discussion. Do not expect to learn the "the real problem" and "the answer" in the class. Management is not an exact science; there is no single, verifiable right answer to a business problem. There are usually a number of alternative possible solutions, each involving different degrees of risk, cost, and simplicity of execution. Although there is no best solution, there are better solutions and worse solutions. Sometimes the faculty may share the outcome of the case; what actually happened is not the answer either, it is just another answer.

Seeing the variety of ideas expressed by class members, and the challenge of defending your ideas in the face of questions they may ask, are the major benefits from case discussions. By seeing others' approaches and styles, you will also better understand your own style. After the case, you are advised to ask yourself "what did I learn?", "what can be generalized from this case?", "how does the course content relate to the case?".