Preparing an Effective Case Analysis

Using the Case Method

The case method brings reality into the classroom. When developed and presented effectively, with rich and interesting detail, cases keep conceptual discussions grounded in reality.

The case method can help your analytical and judgment skills. Case analysis also helps you learn how to ask the right questions. Students aspiring to be managers and business owners can improve their ability to identify underlying problems, rather than focusing on superficial symptoms through development of the skills required to ask probing, yet appropriate, questions. The particular set of cases your instructor chooses to assign the class can expose you to a wide variety of organizations and managerial situations. This approach vicariously broadens your experience base and provides insights into many types of situations, tasks, and responsibilities. Finally, experience in analyzing cases definitely enhances your problem-solving skills.

Furthermore, when your instructor requires oral and written presentations, your communication skills will be honed through use of the case method. Of course, these added skills depend on your preparation as well as your instructor’s facilitation of learning. However, the primary responsibility for learning is yours. The quality of case discussion is generally acknowledged to require, at minimum, a thorough mastery of case facts and some independent analysis of them. The case method therefore first requires that you read and think carefully about each case.

Student Preparation for Case Discussion

If you are inexperienced with the case method, you may need to alter your study habits. A lecture-oriented course may not require you to do intensive preparation for each class period. In such a course, you have the latitude to work through assigned readings and review lecture notes according to your own schedule. However, an assigned case requires significant and conscientious preparation before class. Without it, you will be unable to contribute meaningfully to in-class discussion. Therefore, careful reading and thinking about case facts, as well as reasoned analysis alternatives should flow logically from core problems identified through study of the case.
Your Job
- Read the case at least once.
- Allow adequate time to prepare the case.
- Be ready to “open the case” with the facts and your thoughts.
- Focus on the key issues in each case.
- Look at the case in the time period in which it exists. Adapt to the appropriate time frame with its economic and social norms. Do not answer the issues based on today’s conditions.
- Draw on all your business knowledge.

My Job
- Discussion leader.
- Maintain focus.
- Get students involved.
- Facilitate comprehension of concepts.
- Bring my personal observations from successful entrepreneurs in similar situations.
- Play ‘Devils Advocate.’

Written Case Analysis

The written analysis should be no longer than 3 pages double spaced in 12 point type and is due the day the case is discussed.

1. Cover page: centered on the first page should be the following information:

   Your name
   Title of the Case
   B283
   Case Analysis

2. Introduction:

   In clear, concise language give an introduction to the case. Included in this section the personalities of the characters involved and the environment in which the organization operates. Don’t go overboard on this section. This section should not be more than two paragraphs.

3. Problem Analysis:

   In an objective manner, describe what you think are the major problems and challenges facing the employee and organization in this case. Problems can include what the characters have mentioned and things that you might infer from reading the case. At the end of this section it is also appropriate to mention things that you think
the organization is doing right and does not necessarily need to change. Common examples of problems experienced by companies include: inappropriate organizational structure; poor management, employee communication; lack of employee motivation or weak leadership.

4. Recommendations:

Recommendations should be specific and to the point. Do not give opinions or blanket recommendations (i.e. “hire a consultant” or “require more training”). They should address specific problems the organization is facing. Also, don’t give recommendations to problems which have not been mentioned in the problem section. Don’t give blanket recommendations. (Try to be creative in this section- try to think like a business consultant.)

5. Conclusion:

How do you think the company will do if it implements the recommendations you have set out. Will they succeed? Will they fail regardless of what you recommend? This section should only be as long as the introduction.

Oral Preparation

You should come prepared to handle questions such as:

1. What is really going on in the case?
2. What is interesting about it?
3. Would you mind getting us started?
4. What conclusions can we reach?
5. What would you do to alter adverse results if there are any?
Common Errors in Case Analysis

1. Failure to understand the facts of the case and deal adequately with numbers.
   -Read the case carefully and, if necessary, consult with others before you proceed with the case analysis.

2. Students simply repeat and rehash data provided in the case.
   -Analyze data, don’t repeat it. Remember that your analysis of the data is more important for grading purposes than your recommended course of action.

3. Failure to pursue analysis to a logical conclusion.
   -Don’t stop halfway through; cover all the important issues.

4. Some students conclude that there is not enough information in the case to make a good decision.
   -You MUST recommend a course of action based on the information you have or relevant information you are able to gather from outside sources. Gathering more information can be an additional recommendation.

5. Failure to be decisive.
   -This is ESPECIALLY IMPORTANT when making your recommendations. When in doubt, don’t hedge. MAKE A DEFINITIVE RECOMMENDATION!

6. Failure to organize report adequately.
   -In preparing your report, use the recommended format with appropriate headings and subheadings. The grader looks for reports that flow and have continuity.

7. Excessive grammatical errors.
   -Spelling, punctuation, and grammatical correctness may affect the grade of your report.

8. Failure to proofread the report after it has been prepared.
   -Correct grammatical errors and be sure all pages and tables are included as well as your name. Your instructor can only grade what is turned in, and the way it is turned in.