



CASE STUDIES 1

Use this sheet to help you:

- conduct an analysis of a business situation of a real or fictitious company appropriate for undergraduate coursework
- produce a report which presents your analysis and associated recommendations

5 minute self test

Number the main sections of a Case Study Analysis 1 – 9 to establish a typical structure. The first has been done for you.

1-9	Name of section
	Implementation
	Executive summary
	Statement of major problems
	Generation and evaluation of alternate solutions
1	Title page
	Table of contents
	Problem identification and analysis
	Recommendations
	Reference list

Check your answers on Page 5

What is case study analysis?

In some subjects, you may be required to analyse a case study. This involves analysing a business situation based on a real or fictitious company (or companies) and producing a report or essay-style response to it. The task usually requires you to pretend you are a consultant or manager facing a particular business problem. Your role is to analyse the situation carefully and to provide recommendations.

(See **Study and Research Helpsheets: Essay Writing: The Basics, Essay Writing Attitude, Research Reports Format**).

Why is this task important?

As with any task at university, there are reasons to take this task seriously beyond desire for a good mark. Below are some of these:

- The task can introduce you to organisational problems that you may not have experienced but may need to solve when you begin working in a company
- The task presents an opportunity to identify and solve realistic problems by applying knowledge gained during the course (i.e., the theories and concepts)
- The task can become a focus for discussion of ideas in tutorials. You may have to present your solutions and argue for them and thereby build valuable debating skills
- Debate and discussion about real cases simulates what happens in the business environment, making the task appropriate for future managers and CEOs
- Most corporate decisions are made by groups, and therefore most case study analyses are done as group-work. Group tasks are set by your lecturers or tutors as you need to learn organisational skills and skills for managing yourself and others. Putting together a final report from parts written by different members of a group, keeping others motivated, etc., is not easy, but this is exactly what you will have to do as a manager.

The case study analysis format

The following sections are generally required in a case study analysis:

1. Title page

This contains the title, your group member's names, the class name and the date of submission.

2. Letter / Memo of transmittal (optional)

This may be required in corporate reports announcing the presentation and a report. It functions like a **cover letter** for a job.

3. Table of contents

4. Executive summary

The executive summary is a brief overview of the case which sets the scene and notes any important assumptions made. (You will not have all the information you would like, so you may need to make some assumptions). In addition, you should give a synopsis of your case report, noting very briefly the major problems identified and the recommended solutions. Approximately one page is required.

5. Problem identification and analysis

In this section, you should identify all major problems associated with the case in behavioural terms (i.e. if you are studying a management subject, in management / organisational behaviour terms. Try to get to underlying causes of problems, not just symptoms.)

You should link each problem identified to relevant theory and to actual evidence from the case. Remember, you must integrate theory and reference all non-original work. (See **Study and Research Helpsheets: The APA System** and **The Harvard System**)

6. Statement of major problems

In most case studies, you will identify a number of problems – too many students attempt to actually solve all the identified problems in the number of words allowed. It is crucial to make it very clear which are the major two or three problems or key issues that must be addressed first. Therefore, this section should consist of a concise statement of the problems you are going to solve in the remainder of the case. Approximately half a page is adequate.

Having identified the key problems, you should continually check back to ensure that you are actually attempting to solve them, rather than focusing on other minor problems that you may have identified. This section is crucial for a good case report.

7. Generation and evaluation of alternate solutions

While most problems will have a very large number of possible solutions, it is your task to identify and evaluate a number of the more appropriate ones (at least two to three for each major problem identified).

Each alternative solution should be briefly outlined and then evaluated in terms of advantages and disadvantages (strong and weak points). It is not necessary to make a statement in this section as to which alternative is considered best – this is stated in the next section. Do not integrate or recommend theory in this section. Practical solutions to the problems are required.

8. Recommendations

This section should state which of the alternative solutions (either singly or in combination) identified in Section Six are recommended for implementation. You should briefly justify your choice, explaining how it will solve the major problems identified in Section Six. Integration of relevant theory is appropriate here.

Be aware that students often confuse the findings, conclusions and recommendations.

- **Findings** are factual and verifiable statements of what happened or what was found
- **Conclusions** are your own ideas that you deduce from your findings
- **Recommendations** are what you want done

You will need to recommend precise courses of action that the company needs to take.

9. Implementation

Write your recommendations in the form of an action plan. It is good to include a timetable of what should be done when.

More specifically, in this section you should explain how you will implement the recommended solutions: what should be done, by whom, when, in what sequence, what they will cost (rough estimates) and other such issues. Remember, if a recommended solution cannot be implemented realistically, then it is no solution at all.

10. Appendices (if any)

11. End notes (if any, depending on the referencing system used)

12. Reference list (See: Study and Research Helpsheet: Basic Referencing Using the APA or The Harvard System,)

Further advice

Think about the format carefully. There is no right way, but it is possible to adopt a confusing, repetitive and disorganised format if you are not careful. We suggest that you use all or some of the headings as shown in Steps 1 to 12 above to structure your analysis.

The following advice of Seperich, Woolverton, Beierlein and Hahn (2003) may also be useful when conducting case study analysis:

1. Read the case thoroughly

To understand fully what is happening in a case, it is necessary to read the case carefully and thoroughly. You may want to read the case rather quickly the first time to get an overview of the industry, the company, the people, and the situation. Then, read the case again more slowly, making notes as you go.

2. Define the central issue

Many cases involve several issues or problems. Identify the most important problems and separate them from the more trivial issues. After identifying what appears to be a major underlying issue, examine related problems.

3. Define the firm's goals (only if applicable)

Inconsistencies between a firm's goals and its performance may further highlight the problems discovered in Step 2. At the very least, identifying the firm's goals will provide a guide for the remaining analysis.

4. Identify the constraints to the problem (only if applicable)

Constraints may limit the solutions available to the firm. Typical constraints include limited finances, lack of additional production capacity, personnel limitations, strong competitors, relationships with suppliers and customers, and so on. Constraints have to be considered when suggesting a solution.

5. Identify all the relevant alternatives

The list should include all the relevant alternatives that could solve the problems that were identified in Step 2. Use your creativity in coming up with alternative solutions. Even when solutions are suggested in the case, you may be able to suggest better solutions.

6. Select the best alternative

Evaluate each alternative in light of the available information. If you have carefully taken the preceding five steps, a good solution to the case should be apparent. Resist the temptation to jump to this step early in the case analysis. You will probably miss important facts, misunderstand the problem, or skip what may be the best alternative solution. You will also need to explain the logic you used to choose one alternative and reject the others.

7. Develop an implementation plan

The final step in the analysis is to develop a plan for effective implementation of your decision. Lack of an implementation plan even for a very good decision can lead to disaster for a firm and for you. Don't overlook this step. It is important as a future manager to be able to explain how to implement the decision.

(Seperich, G.J, M.J. Woolverton, J. G. Beierlein and D. E. Hahn, 2003)

And of course, you must not forget to:

- write simple and clear sentences (See **CELT Booklet: Good Writing**).
- reference everything you use (See **Study and Research Helpsheet: The APA System or The Harvard System**)

Answers

5 minute self test

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8	Implementation
3	Executive summary
5	Statement of major problems
6	Generation and evaluation of alternate solutions
1	Title page
2	Table of contents
4	Problem identification and analysis
7	Recommendations
9	Reference list

References

- Kimberley, N. & Cotesta, P. (1998). *Student Q Manual*, Melbourne, Australia: Monash University.
- Seperich, G.J, M.J. Woolverton, J. G. Beierlein and D. E. Hahn, eds.(1996). *Cases in Agribusiness Management*, Gorsuch Scarisbrick, Scottsdale, AZ
- Soy, S. K. (2003). *The Case Study as a Research Method*. Accessed 10/10/03, from <http://www.gslis.utexas.edu/~ssoy/usesusers/l391d1b.html>
- Yin, R. K. (1984). *Case Study Research: Design and Methods*. Newbury Park, CA: Sage