

Case Study Guide

"I hear and I forget. I see and I believe. I do and I understand."
--Confucius (551-479 BC)



Focus:

- Formatting
- Content
- Important points
- Tips

THE CASE SOLUTION FORMAT

Since your case is, in fact, a form of business report, it should be carefully prepared using a series of headings and sub-headings. Furthermore, it should be concise and to the point. Be careful, though, that you do not fall into the trap of analyzing the problem on a superficial basis.

In addition, carefully check your completed work for proper grammar, sentence structure, punctuation, and spelling. Your case must also be presented in a professional and visually appealing manner.

Requirements

The following are the required deliverables for every case study that you submit for grading:

1. Title Page

A title page is an opportunity to create a visually appealing first impression on your reader. It is also a medium by which important information is communicated to the reader of the case. The following points of information are required on the title page of the case:

- Name or Title of the case
- Names and student numbers of all who produced the case
- Date
- Course Code and Section
- Professor's name
- Teaching Assistant's name

When producing a title page, make sure to include all the required information, but do not limit yourself to only that information. As long as the title page is professional and visually appealing, feel free to get creative with it in order to establish a quality first impression on those that read it. You cannot always judge a case by its cover, but you can create a positive outlook for those about to read the case.



2. Executive Summary

The executive summary is a tool used by writers to give a synopsis of the entire paper. There are many reasons for incorporating an executive summary, the most important of which is time. Managers and executives do not have the time to read through entire documents, and must rely on those that prepare the documents to summarize the information in a useful fashion on to one page (MAXIMUM!). The format for an executive summary is included on the following page:

EXECUTIVE SUMMARY

To: Manager / Executive / Professor

From: Name(s) Subject:

Title of the Case

Problem: Primary/Central Problem

- **1-3 sentences explaining the primary problem**
- **Short and sweet!!!**
- **No mention of satellite problems**

Alternatives:

1)

1) Mention all relevant, viable alternatives

Facts Considered:

1)

2)

3)...

- **These are facts directly from the case**
- **These are not assumptions**

Recommendation:

- **A brief paragraph stating immediate, short-term and long-term goals to solve the primary problem**

Worth 5 marks

All based on formatting

All or nothing 5/5 or 0/5

Important Note:

- Exec Summary must be one page max.
- Sentences in point form are necessary.
- Always write the Exec Summary after you have written your whole case.

3. Assumptions

As previously mentioned, students find it difficult to cope with real life business situations when faced with incomplete information. The lack of information can provide opportunities for students, but it can also provide pitfalls in which they can easily get caught. In order to handle the incomplete information, case preparers need to identify assumptions that they make to fill in the blanks that they believe are present.

One challenge that students have is coming up with logical assumptions that will add credibility and depth to the case. Because students all come from different backgrounds and have different life experiences, their perspectives of the cases presented will vary widely.

Do Not Assume the Case Away

Do **not** build your entire argument on assumptions because rarely are these arguments based on factual information.

Assumptions:

- f* Worth 0 marks but are not optional.
- f* Flow from the info in provided in the case.
- f* State facts that brought you to the assumption.

Formatting Tips:

- f* Use bullets.
- f* All assumptions must be in full sentence format.

4. Statement of the problem

One of the most important aspects in producing a quality case is problem formulation. The entire goal of the case format is to identify the primary problem(s) and to recommend methods by which these problems can be solved; if you do not properly identify the primary problem, then you are going to have alternatives that may not be relevant or helpful in solving the case.

Every case that is presented to you will have problems present, and there will be room for improvement each and every time. What you need to do is use the facts presented in the case and your assumptions based on these facts to identify all the problems that exist.

Satellite problems are the secondary problems that exist. They are either a cause or a result of the primary problem, and they are based on the facts of the case. Most often, satellite problems will be explicitly stated in the case. Be sure to identify these satellite problems in sentence format (if the satellite problem is taken directly from the case, remember to use footnotes or end notes), and be sure to elaborate on why they are problems (do not assume that the reader will understand why it is a problem). By analyzing the satellite problems, you will be able to arrive at the primary problem.

....based on the facts of the case....

....satellite problems will be explicitly stated in the case....

Satellite Problems:

- f* Worth 0 marks but are not optional.
- f* Lead you to the Primary Problem.
- f* Stated directly in the case.

→ **Formatting Tips**

- f* Use bullets.
- f* All points must be in full sentence format.

The primary problem(s) is the key part of the case. You must be concise and to the point to show your understanding of what is plaguing the organization and/or the people involved in the case. When looking at satellite problems, ask yourself “Why?” to determine if it is a cause or a result of the primary problem(s). What is important here is to pinpoint the basis for which the goal of your case will be built on.

Primary Problem:

- f* Worth 5 marks.
- f* Based on clarity and understanding of the situation.
- f* Always ask yourself “Why?”

▼ **Formatting Tips**

- f* In paragraph format.
- f* Primary problem should be 1-2 sentences long.
- f* Do not write a page in length!!!

...pinpoint the basis for which the goal of your case will be built on....

Implications are split into two sections; *Implications on the Organization* and *Implications on the Personnel*. By identifying the implications of the problems, you show an understanding of what is happening and what can happen if these problems are not solved. Implications are a look to the future at potential problems that can occur, and we ask you to separate your analysis in to the Organization and the Personnel involved.

The implications on the organization look at the entity / entities involved in the case, and you need to identify what is going to happen to the organization if the problems persist. The implications on the personnel look at the impact of the problems on all the people that are involved in the case.

Whereas the primary and satellite problems identified above are based on the facts of the case, the implications will be your interpretation of the facts. This is your opportunity to show a thorough understanding of the problems and what will happen if they continue. Similar to the writing of the assumptions discussed above, you should identify the implication and then identify the facts from the case that led you to the implication.

Formatting Tips

- f* Bullet form.
- f* In full sentence format.
- f* Each set of Implications should have 5 points.

.....should identify the implication and then identify
the facts from the case that led you to the implication.....

Example:

Do not write

Implications on the Personnel

- f* Low morale

Write elaborate and detailed sentences that justify your claim, such as the example that follows

Implications on the Personnel

- f* The recent firings of several middle level managers will lead to a low morale amongst the remaining middle level managers, who may now fear for their jobs.

By seeing what is wrong as a result of the problems, you are now ready to look in to how to make things right.

5. Alternative Solutions

Identifying problems within a real life situation creates an opportunity to solve those problems. Be intelligent and innovative in developing methods that could alleviate the problems at hand. This section involves practically applying theories and concepts to real life situations.

Alternatives:

- f Worth 50 marks
- f Each alternative is worth 50/ #of alternatives
- f
- f 3-5 alternatives is expected

...is to ensure that you understand the severity of

The case analysis is a developmental paper that follows the logical thought process incorporated in solving problems. The reason that the **status quo** is analyzed is to ensure that you understand the severity of the situation at hand and be able to outline what will occur if no changes are made. You have been told that all alternatives presented must be capable of solving the problems, but, even though the No Change Scenario will not solve the problems in the best manner, it must still be presented and analyzed thoroughly. When formatting your paper, ensure that the No Change Scenario is the first alternative presented; this is to highlight your logical thought process in understanding the current situation before suggesting possible changes.

~~the situation at hand and~~
be able to outline what will occur if no changes are made...

...must still be presented...

Alternatives must be presented in a logical and comprehensive manner. In order to leave no room for misinterpretation for the readers, we recommend that you present your alternatives as follows:

Very Important:

...description should start with a few sentences which contain the theory or concept supporting the chosen alternative...

...the following sentences should describe how the theory or concept could be practically applied to the particular problems at hand...

Description: Your description should start with a few sentences which contain the theory or concept supporting the chosen alternative. The following sentences should describe how the theory or concept could be practically applied to the particular problems at hand. This will allow you to apply the material from the course to real life business situations.

Pros & Cons: This section is a basic comparison of the advantages and disadvantages of the alternative put forth as a prospective solution to the problems identified.

Analysis: In this section, it is important to weigh the pros against the cons, and evaluate the applicable consequences, and you must tie the alternative back to the primary problem(s) and the situation presented in the case as a whole. You must conclude each alternative presented with a judgment as to whether or not it will solve the problems presented. Is it the most effective way to solve the problem? Will it solve the problems without creating new ones? Are there options available that are more viable or feasible?

An example of how you could structure and present your alternatives, but that you are not limited to, follows:

No Change Scenario (or Status Quo)

Your first paragraph should be a paragraph thoroughly outlining what the alternative involves. To not include a description of the alternative and jump right in to the pros and cons of the alternative is to leave too much room for interpretation for the reader, and leaving room for interpretation can often lead to misinterpretations. In order to ensure that you and the reader are both clear on what the alternative involves, describe it here. An insufficient description would be "Allow all things to remain as they are". You need to describe what will continue to happen if nothing changes and elaborate on key points that lead you to believe what your pros and what your cons are.

Pros

Pros and cons can be listed as presented here, or they can be in a table side by side with the cons

Pros can be listed using bullets as they appear here, but they must be presented here in full sentences – the reader must understand what you are trying to communicate, and saying something to the effect of "It saves money" is insufficient

Be sure to cover all possible pros and cons; a thorough presentation of the alternative will touch on all aspects of the case

Cons

There is no magic number for pros and cons that should be listed for each alternative. The status quo will obviously have very few pros and many cons if problems truly do exist, while viable alternatives that can solve the problems can have many pros and few cons.

You must use the listing of pros and cons to differentiate alternatives that are somewhat similar in nature.

Analysis / Summary / Evaluation

Any of the above sub-headings are sufficient for identifying this portion of the alternative. If it's not a viable solution for the problem, then it probably should not be presented.

Your analysis is a paragraph or two in sentence format that gives you the opportunity to weigh the pros against the cons. It is insufficient to simply rehash all the points that you brought up above in the listing of the pros and cons; the first half of the alternative was focused on presenting information, and now is your opportunity to interpret and evaluate that information. Be thorough in your analysis, and come to a conclusion on whether or not the alternative solution presented here is a viable option that could possibly be pursued.

Important Tips:

- f Avoid “Hiring Consultants” as an alternative. You are the consultants, and you’ve got a problem to solve. Don’t pass it off on to somebody else.
- f Make sure that your alternatives are reasonable. When seeing that a manager may not be effective, don’t immediately propose to fire him. The majority of the cases that you will be presented with have problems where the underlying factors are more than just the individuals involved. Be certain before toying with peoples’ lives.
- f Be sure to apply any theories that you present to the real life situation of the case study, and do not simply present generic concepts.

Now that you know how to properly format, present, and prepare an alternative solution, you are ready to learn how to structure your recommended solution.

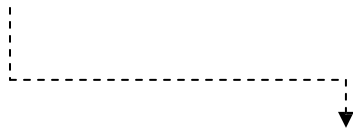
6. Recommended Solution

Now is your opportunity to select the alternative or combination of alternatives that best solves the primary and satellite problems. In the paragraphs that make up your recommended solution, you must outline:

- which problems the alternative(s) solves, and any problems that it may not solve
- why it solves them better than other viable alternatives,
- how the combination of alternatives, if recommended, is better than any individual alternatives (or vice versa)
- a forecasting look at how the recommendation will benefit the personnel and the organization.

Recommended solution should be selected based on all the alternatives that were presented in the case. While each alternative is evaluated independently in the alternative section of the case, each alternative should be evaluated compared with or contrasted against other alternatives presented as viable solutions. Explaining how your solution best solves the problem and setting it apart from the viable alternatives that you are rejecting indicates that you are a practical and reliable problem solver.

Please be thorough and elaborate in these paragraphs so that the readers understand exactly why and how this solution solves the problems. The last step is making your solution come to life!



Recommendation:

- f Worth 5 marks.
- f Always tieback to the primary problem.
- f Take the marker step by step through how this Alt solves the primary problem.
- f What separates this alternative from the others?

7. Implementation

The implementation section is the place where a **great case can distance itself from a good one**. The purpose of outlining methods of implementing your solution is to allow you to outline how your theories and concepts and ideas that you recommended can become a reality. By defining the problems, you show you understand what needs to be corrected; by recommending a solution, you show you understand the concepts of what needs to be done; by logically and properly implementing a solution, you show that can comprehend real life situations through a logical dissection.

Implementation is broken down in to three separate sections, with each section being allocated five marks. It can be presented in sentence format in bulleted lists as long as the reader understands what is required.

Immediate action

The immediate action required is all that needs to be done between today and six months from now. The business world is a fast paced environment, and if a problem exists, it needs to be dealt with right away. This must be a logical and sequential format, and you must reasonably establish a chronological method by which your solution can become a reality. For example, if your solution is to change the management style of the organization, it will be insufficient and illogical for your first step of immediate action to involve telling the manager that he must change his style. Be reasonable and rational, and show an understanding of a real life situation.

....must be logical and sequential....

Short term action

The action required in the short term needs to be accomplished between six months and one year from the present. Many aspects of the short term action will be following up or adding to things that were completed in the immediate time frame; there will also be many aspects of short term action that can only be introduced to the solution in a time frame of at least six months from the present.

....will be following up or adding to things that were completed in the immediate time frame....

Long term action

The long term action is any action required one year from the present and beyond. It is also a combination of items that are following up on items introduced in the previous year, and the introduction of new items. This is also a good time to reflect back on the solution and evaluate its success after a year.

...reflect back on the solution and evaluate its success after a year...

Implementation:

- f* Bullet form.
- f* Each section is worth 5 marks
- f* Bullets in full sentence format.

8. Spelling, Grammar, and Presentation

Cases that are submitted that include spelling, grammar, punctuation or presentation errors are unprofessional, and for this reason, errors in this category are inexcusable. If your case has one error present, you will receive 7 out of 10; if you have two errors, you will receive 6 out of 10; if you have three errors, you will receive 5 out of 10; if you have more than three errors present from this category, you will receive 0 out of 10 for this section.

Everyone starts off with 10 out of 10, and everyone should be able to keep those 10 marks – the key is to have your case PROOF READ several times. You must resist the temptation to say your case is done when you've finished writing it, and that there is still plenty of work to be done. It is highly recommended that someone other than the preparer(s) proof read the case because they'll be able to catch things that you would not notice having written the paper yourself.

Hopefully the above guidelines and suggestions have cleared up any misconceptions that you may have had regarding preparing a case. You should use this information as a guide, but not limit yourself to the information presented here, presented in ADM 1300 or presented in the seminar. Please feel free to get creative and innovative while working within the boundaries and parameters that have been established.