

Case Study Guide

THE CASE SOLUTION FORMAT

Case studies allow students to apply concepts and theories to real-life business situations to solve a problem. The focus of your case study solutions will be on the process – how are you identifying and solving the issue at hand? There are several ways that the solving approach could be undertaken. The focus in this approach is to develop critical business skills of problem solving and critical thinking.

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.

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, in addition to making it look professional.

2. Executive Summary

The weighting of the executive summary is five (5) percent. The executive summary is a tool used by writers to give a synopsis of the entire report. 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**. The format for an executive summary is included on the following page.

EXECUTIVE SUMMARY

To: Manager / Executive / C.E.O.

From: Name(s)

Subject: Title of the Case

Date: Date of case submission

Critical Assumptions

Problem: Primary/Central Problem

- **Short and precise!**
- **No mention of satellite problems**

Alternatives:

- **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**



Important Note:

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

3. Critical Assumptions

Critical assumptions are weighted at five (5) percent. It is sometimes challenging 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, preparers need to identify critical assumptions that they make to fill in the blanks that they believe are present.

One challenge is coming up with logical critical assumptions that will add credibility and depth to the case. Because students 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*
- f* Flow from the info in provided in the case.
- f* State facts that brought you to the assumption.

4. Problem Analysis

The problem analysis section is weighted at 20 percent. 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 this problem (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. Frequently, 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.

Primary problem is the most important 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).

f Primary Problem: *f*
f Based on clarity and understanding of the situation.
Ask yourself “why?”



Formatting Tips

f In paragraph format.
Primary problem should be precise.
f Do not write a page in length!!!

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

5. Alternative Solutions

The alternatives section is weighted at 35 percent. 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 problems.

Alternatives must be presented in a logical and comprehensive manner. In this course, you should note that there is always more than one alternative. In order to leave no room for misinterpretation for the readers, we recommend that you present your alternatives as follows:

Description: Your description should start with a precise statement of the alternative. Then, this should be followed by 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 problem at hand. This will allow you to apply material from the course to real life business situations.

Pros and 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 and cons, and evaluate the applicable consequences. You must tie the alternative back to the primary problem and the situation presented in the case. You must conclude each alternative presented with a judgement 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 problem without creating new ones? Are there options available that are more viable or feasible?

Important Tips:

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- 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.
- 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.
- 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

This section is weighted at 10 percent. 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.

The recommended solution should be selected based on all the alternatives that were presented in the case report. 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!

7. Implementation

The implementation section is the place where a great case can distance itself from a good one and is weighted at 15 percent. 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.

Immediate

The immediate action required is all that needs to be done right away. 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. Here, you are generally looking at what to undertake from the present to about 6 months from the present.

Short term

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 several months from the present. Generally, we are looking at six months and one year from the present.

Long term

The long-term is a combination of items that are following up on items introduced in the previous terms and the introduction of new items. This is also a good time to reflect back on the solution and evaluate its success. Generally, we are looking at a period of time that is one year and beyond from the present time frame.

8. Spelling, Grammar, and Presentation

This has a weight of 10 percent. In addition to the quality of writing in each section, case reports will be judged on their overall spelling, grammar, punctuation and presentation.

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 must appreciate that there is still 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.