



## Case Study Analysis (for Undergraduates)

### Teaching and Learning Unit Faculty of Economics and Commerce



#### What is Case Study Analysis?

You will be required to analyse a case study in some subjects. This entails analysing a business situation based on a real or fictitious company(ies) and producing a report or essay-style response to it. (See **TLU Help Sheets: Essay Writing: The Basics, Essay Writing Attitude, The Report Format**).

The aim in case study analysis is usually to *pretend that you are a consultant (or manager) with a particular business problem that you need to solve*.

Case Study Analysis is a response by you (as the manager or consultant) to the situation in a company(ies) and your recommendations for overcoming the problems.

There are good reasons for learning the skills of case study analysis:

- They provide organisational problems that you probably have not experienced but may need to solve when you begin working in a real company.
- They provide a situation in which you can identify and solve problems by applying the

knowledge gained during the course (i.e., the theories and concepts).

- They are a good focus for discussing ideas in class or in tutorials. You may have to present your solutions to the case in class or in tutorials and argue for them. Debating is a useful skill.
- Debate and discussion about real cases simulates what happens in the business environment, so it is very appropriate for intending managers and future CEOs.
- Most corporate decisions are made by groups and therefore most case study analyses are done as group-work. Group tasks are deliberately set by your lecturers or tutors as *you need to learn organisational skills and skills in 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 have to do as a manager.

#### The Problem Solving Case Study Format

Use the following sections in your case study:

1. Title page
2. Letter/Memo of transmittal (optional)
3. Table of contents
4. Executive Summary

This should be about one page in length. An Executive Summary highlights all the main points covered in the report. It should be written last and it should be very succinct (see the **TLU Helpsheet: Writing an Abstract**). Overview the case report noting the main problems with the case that you discuss in the report and note your main recommendations. Note any assumptions you need to make. All case studies require some assumptions as you will not have all the information you need.

#### 5. Problem Identification and Analysis

This section is the place for presenting your findings about the case. Put the findings in the form of *problems* in the case under consideration. Don't just state the *symptoms* of the problems. Try to uncover the principal *causes*. The problems can be expressed in behavioural terms or in organisational behavioural terms, e.g., what is *happening* within the company that is influencing the company's profitability.

#### 6. Statement of Major Problems

In this part of the report give a very short statement about the problems that you have identified in the case under consideration. You will need to spend about half a page on this. Typically, you will identify a range of problems.

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Try to itemise which of the problems are most critical, and which need attention first. Prioritise them.

When writing later sections of the report make sure you return to this section. Use it as a “checklist”. Make sure you have covered all the problems in later sections that you have identified in this section. What you identify in this part should be addressed in detail in later sections.

## 7. Generation and Evaluation of Alternate Solutions

This section is for trying to solve the problems that you have identified in the previous section. Don't try to solve *all* the problems you identify. It is better to try to address a few very well rather than attempting to do too much. But equally, ensure that you cover the other problems in some detail, even if you do not solve all of them.

There will be—at the very least—two or three possible solutions for each problem. You need to identify these solutions and evaluate them in detail. What are the advantages and disadvantages of each solution? Which can be implemented easily and why? Which solution is more cost efficient? Resist the temptation to make a statement about the best solution for each problem here. You do this in the next section.

One more thing: Do not integrate theory into your solutions in this section. In this section only discuss the *practical* issues that are relevant to the case.

## 8. Recommendation(s)

In this section you are required to recommend a course of action in relation to the case. Which solutions should be adopted? In what order should they be adopted? Can they be adopted individually or in combination? Justify why you are making your recommendations. Why have you chosen *these* recommendations over others listed in the previous section? Give an account of how the solutions you propose will solve the problems in the case. You will need to integrate theory into your explanation. You will need to *recommend precise courses of action*.

**Note:** 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.

## 9. Implementation

In this section create an **action plan**. Include a timetable of what should be done when. This could be best expressed in the form of a table, but it does not have to be in this form.

In this section you should explain *how* you will implement the recommended solutions. Say exactly *how* they should be implemented, *where* they should be implemented and *who* will carry them out. Tell the reader which recommendation needs to be done first, and so on in order. Costing needs to be carried out—in rough estimates. Ensure that your recommendations are realistic and achievable.

## 10. Appendices (if any)

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

12. Bibliography (See: TLU Booklet: Basic Referencing Using the APA or Helpsheet: The Harvard System,)

### Writing up the Analysis:

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. So, we suggest that you *use (all or some of the) headings as shown in steps 1 to 12 above to structure your analysis*.

*Make sure your recommendations are logically linked to the analysis of what you found.*

*Write simple and clear sentences (See TLU Booklet: Good Writing).*

*Reference everything that you used. (See TLU Booklet: The APA System or The Harvard System)*

Further advice for case study analysis is given below. This information comes directly from Seperich, Woolverton, Beierlein and Hahn, 2003:

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. Read the case again more slowly, making notes as you go.
2. *Define the central issue.* Many cases will involve several issues or problems. Identify the most important problems and separate them from the more trivial issues. After identifying

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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).* The 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 problem(s) 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).

**Sources:**

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