

### What is a 'case'?

A case is a scenario that gives you the opportunity to identify problems, apply theory and recommend a course of action in a business situation. The case may be real or fictional, but will usually represent a complex situation with no ready solutions.

### What is your role as an analyst?

In analysing a case your task is to

- identify the problem(s) in the situation presented in the scenario
- analyse the key issues within the context of theory/ies presented in your course
- develop and compare alternative solutions to the problems
- consider the advantages and disadvantages of various possible solutions
- select the best solution and make recommendations for action
- write up your case analysis in appropriate case analysis report format.

### Why are you asked to write case analyses?

You are asked to write case analyses in some of your courses to enable you to demonstrate that you can apply conceptual frameworks from your course to real situations and integrate topics in your analysis.

Case analyses also enable you to improve your critical thinking and analytical abilities, your ability to evaluate sources of information and your written communication skills.

Case analyses are often used in employment interviews to assess:

- how you think
- how you structure problems
- your ability to \*conceptualise, \*draw clarity from ambiguity, \*form views, \*make recommendations.



### **What are the stages in preparing a case analysis?**

There are a number of stages in preparing a case analysis. These are:

- understanding the case
- identifying the core problem in the case
- analysing the issues in the context of a theoretical framework
- exploring alternative solutions with reference to a theoretical framework
- choosing the best solution
- making recommendations for action.

### **What do you need to do to understand the situation?**

Your first task is to understand the scenario you are given. When you read the scenario you should identify the facts of the case. The following questions can guide you in doing this.

- What is the mission of the organisation?
- Who are the "stakeholders" within the organisation?
- Who are the "stakeholders" or target groups outside the organisation?
- What is the formal decision making process in the organisation?
- What are the informal decision making processes in the organisation?
- What is the process of production or service delivery?
- Who are the competitors?
- What external factors impact on the organisation?
- What is the major problem?
- What are subsequent problems and implications?
- What is the role of management in relation to the problem?
- What is the role of production/service providers in relation to the problem?

As you are reading you will also need to fill in gaps based on your knowledge of theory and of the world and ignore irrelevant details.

### **What are the steps in identifying the core problems?**

As you identify the facts of the case you will begin to think about the problems and to decide which problems are core problems. In doing this you will need to

- distinguish between symptoms of the major problems and the major problems themselves
- distinguish between immediate and longer term problems
- find evidence to support your decision about what you believe to be the core problems.

### **What are the steps in analysing the issues?**

As you identify the core problem(s) you will begin to analyse the issues underlying these problems. The following steps assist with this.

- Identify any bias in the way the case is described.
- Classify the factors that influence the problem as internal or external to the organisation.
- Reflect on theoretical principles from your course that might explain aspects of the case.
- Apply analytical models from your course to further illuminate the situation.
- Identify the decisions that need to be made.
- Identify strategic issues.
- Identify risk factors.
- Identify historical precedents.

### **What are the steps in exploring alternative solutions?**

As you are analysing the issues you will begin to think about alternative solutions. You should:

- consider individual and organisational levels
- consider the long and the short term
- define the alternative possible solutions
- compare the alternative solutions in regard to \*theoretical grounding, \*strengths and weaknesses, \*risk factors.

### **How do you choose the best solution?**

As you explore the alternative solutions you will begin to decide on the best solution for the organisation in solving its problems. It is important at this stage to provide a justification for the solution you choose.

### **What are the steps in making a recommendation?**

When you have decided on the best solution you will be able to make a recommendation or recommendations.

At this stage you should do the following:

- Express your recommendation(s) precisely.
- Ensure that your recommendations are complementary.
- Ensure that it is feasible to implement the recommendations.

### **How do you present your case analysis?**

A case analysis is presented as a report. Refer to the EDU handout on reports for guidance on how to format a report. The following is a suggested structure for a case analysis report:

|                  |   |
|------------------|---|
| Introduction:    | Describe the situation and identify the main problem.   |
| Body:            | Analyse the problem and the issues underlying the problem.<br>Present and analyse alternative solutions to the problem. |
| Conclusion:      | Identify the best solution.   |
| Recommendations: | Identify the courses of action needed to implement the best solution.   |

### What makes a good case analysis?

A good case analysis:

- clearly identifies the core problem(s)
- provides a justification for the choice of core problem(s)
- analyses the issues underlying the problem in terms of the relevant theory
- uses appropriate terminology
- justifies the alternative solutions in terms of appropriate theory
- justifies the choice of the best solution
- presents feasible and complementary recommendations for implementing the best solution
- is presented in appropriate report format.

### Is there a best answer for a case analysis?

It is important to remember that there is no one correct answer to any case analysis. As in real life, there is more than one way to interpret a case and solve problems, so there is no single answer. The approaches, interpretations and recommendations of different students will probably vary considerably. This provides a useful opportunity to compare and discuss different analyses and alternative solutions, which is a common practice in real life before finally recommending one solution.

### Are all case analyses similar?

The general principles explained in this handout are relevant for all case analyses. However, there are some differences in requirements from one course or one case analysis or one lecturer to the next. Sometimes, for example, it will not be necessary to make recommendations. These notes provide a general understanding BUT you should always give priority to your lecturer's requirements!

### Do I answer 'critical incident' questions in the same way as case analyses?

Sometimes, especially in an exam, you may be presented with a case study in the form of a 'critical incident' and asked a series of questions about it. In this case you do not have to write a case analysis according to the format described in this handout. You simply answer directly the questions you are asked.