Note on Case Analysis

Cases are not like exams. Obvious solutions are seldom correct. You must apply information from many sources (text, lecture notes, the case itself, and outside references) to develop a recommendation that is both conceptually appropriate and managerially feasible. If there are specific questions provided or suggested for a case make sure that you address them in the analysis.

Approach the case as an outside consultant called in by the senior manager named in the case. Double space and limit your report to five text pages and a maximum of three exhibit pages. Use side heading to introduce topics.

In the opening paragraphs present your problem description followed immediately by the recommended solution. Be very specific when describing implementation steps, for example, “The Sales Manager, Mr. Barnum, should hire two sales people for assignment in the Denver and Cincinnati regions by March of this year. Estimated costs are between $60,000 and $100,000. Breakeven in units of 4,000 should be reached easily, thus justifying this decision.”

Pay particular attention to the who, when, how, where dimensions of the recommendations, as well as the what. Do not dump the problem back in your client’s lap with a recommendation like, “You must develop a new mission statement to better define strategic opportunities. Additional marketing research is recommended to support this decision.” Give them a sample mission statement using available information so they can see what you are talking about.

Subsequent paragraphs should present evidence supporting both problem identification and recommended course of action. Your opinions do not constitute evidence, but are still important if they synthesize the exiting information. Information consists of more than simply restating case exhibits and other factual information. Rework case data (which is most often simply a financial or operating summary) into ratios or indexes that capture a trend. Do not just report isolated numbers, “First quarter market share was 23%,” instead use data comparisons to make a point, “DHL may be under pricing document deliveries in comparisons to FedEx by 20 to 30% below what their customers would be willing to pay given the quality difference. This leads to first quarter share of 23% on a unit basis, however, it could be higher (33%) on a dollar basis with a price increase of 20%.”

To communicate effectively remember your goal; to persuade a senior manager into implementing your recommendation. Get to the point, write sparingly and convey as much relevant supporting information as possible. Avoid flowery language, slang, colloquialisms, etc. This is a formal report to someone that you do not know very well. Never make reference to “the Case”, it is not a case to them, it’s their career and future at stake. Use active voice and take a stand.

Appearance, grammar, spelling all count (just like at work). Use reasonable margins all around and 12 cpi. Cite outside reference properly. In sum, communicate professionalism.