

**Man 513**  
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### **How to Analyze a Case <sup>§</sup>**

Although each case is different, the following steps are suggested to help you develop a systematic method of analyzing a case and reach a solution efficiently.

1. Read the case rapidly to obtain an overall understanding of the situation. At this point, you may wish to note the key facts that appear to provide the context for the problem and possibly even to write an initial statement of what you believe to be the main problem/s in the case.

2. Read the case again more thoroughly. Carefully study any exhibits and tables to identify the key facts in the case. These key facts should be listed in summary form as to their meaning. For example, "Retail margins are 18 percent" is a fact that conveys no meaning. If we add that "This represents a decrease in a margin from 25 percent, and as a result retailers are not providing much push," the fact of an 18 percent margin now has significance for our identification of the case problem and its solution.

3. State the central problem in the case. Frequently, additional subproblems may need to be stated so that the scope and nature of the central problem is clearly identified. The definition of the problem is the most important step in the decision-making process; if you have not correctly identified the problem for the case, it will be impossible for you to solve it. There is considerable truth to the point that a problem well defined is more than half solved. You should continually review and restate, if necessary, the problem definition as you work on the subsequent steps of your case analysis.

In defining a problem, it's essential to distinguish between the symptoms of the problem and the problem itself. A common example used is the symptom of declining sales, which often is called the *problem*. The key facts you have obtained from a careful study of the case generally represent *symptoms*. Only rarely is the real problem stated in the case. Often an "erroneous" problem will be given, which, even if solved well, will not get the firm out of its difficulty. In fact, the firm may even be worse off because attacking the real problem has been delayed.

Wasson, in his writing, urges that a distinction be made between the management action in question and the underlying issue that puts this action in question. A management-action question may be, Should management introduce its newly developed product? This question has no focus in that it does not help us decide what facts are needed. The underlying issue may be: Does this product offer consumers a significantly greater perceivable degree of satisfaction of some kind, at a price they consider fair? Now we have a direction as to what facts, concepts, and principles may have relevance to this issue. At this and some later stages, you may want to go back to your notes and texts from the courses you have had in various functional areas. They will help you put the issues in focus.

4. Identify and state the alternative courses of action that are reasonable and feasible for this firm to consider as possible solutions for the problem. It should be noted that one course of action may be to do nothing, that is, to make no changes from the present methods of operation.

5. Set forth the criteria you use to evaluate the acceptability of these alternatives as solutions for the problem. This is very important.

6. Analyze each of the alternative courses of action, discussing the advantages and disadvantages of each with support. In making your analysis, you may find it helpful to ask pertinent questions that will direct your investigation to the facts and information you need. Thus, you are forced to make certain assumptions. If you find that a course of action is crucial to your solution and that you have great uncertainty as to its validity, your recommendation may be that appropriate research be done to obtain the facts. If this is the case, you should be prepared to suggest what this research will cost and to defend the need for this expenditure. The comments in step 3 about supplementary reading apply here, too.

7. State your recommended solution, along with a well-organized defense of your selected alternative and the reasons for rejecting the other alternatives. Your analyses from step 6 should be most helpful in this presentation.

### **How to Present a Case §**

After you analyze a case, you may be asked to present the case in a written report and/or verbally to the class. During your presentation, you have two overall objectives. First, you should inform your instructor and your classmates of the results of your case analysis. Here you will discuss the steps you completed during case analysis, including the formulation of the problem and the subproblems, the identification of important variables, the objectives and the goals of the organization, constraints and restrictions to be considered, alternatives facing the organization, important assumptions, the quantitative technique/s employed, the input data for and solution from the quantitative techniques, how the solution was tested and analyzed, how the action plan was formulated, and suggestions for action plan implementation, evaluation, and maintenance.

Your second objective is to convince your instructor and classmates that your approach and action plan are the best. Here you will market and sell your ideas to others. You need to note other action plans you considered and reveal why yours is better and will help the organization discussed in the case to better obtain its goals and objectives while solving its inherent problems.

If you are preparing a written case, you should have a well-organized report. Although there is no one best way of organizing the written report, the following outline may be used as a model in preparing the major sections:

#### **I. Contents**

II. Summary of Findings

III. Background Information ( This section provides a very brief overview of the case.)

IV. Problem Statement (This section summarizes the most salient problem/s pertinent to the case.)

V. Analysis of Alternatives (It should be easy to understand, i.e., as non-technical as possible.)

VI. Detailed Recommendations (It should be precise and based on the assumptions and analysis.)

VII. Implementation and Evaluation

VIII. Appendices (All exhibits should be appropriately titled and referred to in the text.)

In developing the written report, develop a draft and then revise it in producing the final written report. Before you write the draft, consider the level and needs of the reader, carefully organize and outline the report, and determine what you plan to say and how you will persuade others to accept your action plan.

When writing the draft, do the following: write quickly and without hesitation, not worrying about spelling or grammar; use paragraphs that contain only one or two major ideas; use familiar and simple words; support all statements with facts; and use forceful and convincing arguments. In revising the draft, check the organization of the paper to make sure it is logical and clear, correct and accurate, and free from grammatical errors and problems. Also, remember to number every page of your report.

The same outline employed with the written report can be used for an oral presentation. When making an oral presentation, keep a number of points in mind:

1. Adequately prepare the case before class.
2. Keep an open mind.
3. Market and sell your ideas.
4. Incorporate outside experiences.
5. Listen to others.
6. Be brief.
7. Take an offensive position instead of a defensive position.
8. Listen to and learn from other students.
9. Be courteous and constructive.
10. Don't repeat yourself; don't repeat others.
11. Don't overemphasize one particular idea.
12. Avoid changing the topic suddenly.

By following these guidelines, you should have a successful experience with case analysis. You will also develop a set of problem-solving skills and communication techniques that will be valuable to you in any job. Good luck!

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<sup>§</sup> Adapted from Cases and Readings in Production and Operations Management, Joseph C. Latona and Jay Nathan, Allyn and Bacon, 1994.