

Analyzing A Case

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NOTE: this information is provided to assist you in developing your **individual research case study**). For the team case study, you will be asked to address questions about the case as presented by the professor. Since all teams will be working on the same case, there is no need to summarize the specifics of the case (as indicated below under "Components") since those are well known to each team member and to the professor.

Specific Requirements:

As you will see below, a case study consists of three parts: identification, analysis and recommendations. It may be helpful to organize your work by considering the study to be three separate -- but very much related -- papers of several pages each. However, it should be noted that it is the overall study that will be evaluated and graded. In other words, the whole should be greater than the sum of its parts.

Research and Writing:

The following is excerpted and summarized from pp. C-2 to C-12 of Thompson, Arthur A. Jr. and Strickland, A.J. III. (2003). *Strategic management: concepts and cases* (13th ed.) New York, NY.: McGraw-Hill Irwin. The Thompson and Strickland book is the primary text for MGMT670, Strategic Management. Direct quotes from the text *are in italics*; text in block letters are this author's summary or insertion. (It should be noted that this section was omitted from later editions.)

1. According to Thompson and Strickland, some of the **objectives** of a case study are: *Increase your understanding of what managers should and should not do in guiding an organization to success.*
2. *Build your skills in sizing up organizational resource strengths and weaknesses and in conducting...analysis in a variety of industries and competitive concerns.*
3. *Get valuable practice in identifying...issues that need to be addressed, evaluating...alternatives, and formulating workable plans of action.*
4. *Enhance your sense of business judgment....*

The **components** of a case study are:

1. *identify...the pertinent issues management addressed or needed to address.*
2. *perform whatever analysis and evaluation is appropriate.*
3. *propose an action plan and set of recommendations addressing the issues you have identified*

Identification

Thompson and Strickland define identification as "*diagnosis of...issues and key problems and that you demonstrate a good grasp of the organization's present situation....Consider beginning your paper with an overview of the organization's situation, its strategy, and the significant problems and issues that confront management* (p. 370).

The opening section of the case study should identify the issue(s), their historical development (briefly!) and what strategy management is (or appears to be) employing. If no strategy is apparent, then there should be some explanation as to why there appears to be no strategy.

Analysis and Evaluation

As Thompson and Strickland note "*This is usually the hardest part of the report. Analysis is hard work!*" (p. 370)

Thompson and Strickland propose five steps in conducting the analysis and evaluation, summarized below. However, **not all steps are equal and not all steps are even necessarily relevant**, depending on the nature of the organization being studied. You should utilize those steps appropriate to the organization you are studying.

- Is the organization's strategy producing satisfactory results? Why or why not?
- Is it apparent that the organization doesn't have a strategy? Why?
- What competitive forces does the organization face? How is it responding to these forces? If it isn't responding, why?
- Is the organization being simply responsive or is it being proactive? Is it merely attempting to meet challenges or is it anticipating challenges and planning accordingly?
- Your interpretation of facts, statements, etc., should be reasonable and objective; don't rely on generalizations and platitudes. Avoid presenting a one-sided argument that excludes factors not favorable to your conclusions.

In addition to these five points, the analysis should also include the identification of any issues the study's authors overlooked, failed to give adequate attention, etc.

Recommendations:

Your section on recommendations should include:

1. A set of definite recommendations that constitute a plan of action.
2. Recommendations should logically follow your analysis.
3. Your recommendations must be realistic. For example, if a recommendation would require additional resources, how should the organization acquire those resources? Are your recommendations workable given the culture of that field of activity and the internal culture of the organization?

Thompson and Strickland advise "*Avoid recommending anything you would not yourself be willing to do if you were in management's shoes.*" Keep in mind the size limitation of the case studies (10-12 pages for the individual research case study; 8-10 pages for the team case studies) in assessing the extent to which you utilize the above information