

Case Study

How to Read, Discuss, and Write a Case Study Analysis

Adapted from William Ellet's "The Case Study Handbook"

What is a Case?

- A verbal or written representation of reality
- The purpose is to represent reality, conveyed within the situation
- Has many crosscurrents and rough edges – including irrelevancies, sideshows, misconceptions, and little information or an overwhelming amount of it
- Case Studies are not necessarily logical or coherent
- However
 - They contain a significant business issue or issues
 - Have sufficient information on which to base conclusions
 - No stated conclusion
- Being an active reader
- Three ways to read:
 - Receive it: typical passive reading
 - Find it: looking for clues to develop a story
 - Make it: using evidence to support your opinion

TYPES OF CASES

- Problem:
 - Something important has happened, but we don't know why it did.
- Decision
 - The decision may be implicit or explicit [unclear/clear]
- Evaluation:
 - Expresses a judgment about the worth, value, or effectiveness of a performance, act, or outcome

Case Preparation

- Situation
- Questions
- Hypothesis
- Proof of Action
- Alternatives

Situation (5 Minutes)

- Most Difficult
- Bridging "No Knowledge to Sufficient Knowledge to Hypothesize"
- Understand the big picture first, then details
- Start by Asking "What is the Situation?"
 - Problem
 - Situation
 - Evaluation
- The first section, and then the last section
- Decision and Evaluation usually are stated in the beginning
- Problems are not so easy
 - Typically, absence of an actionable statement
 - Main Character is wondering what to do!

Situation (5 Minutes)

- After reading first and last section:
 - Put the case aside
 - Reflect on what you learned
 - Is it a Problem, Decision or Evaluation?
- Is there a "*causal*" framework, or criteria?
- Do you have enough information, or is it sparse?
- Are there hints of:
 - A possible cause (problem case), and criteria (decision or evaluation case)?

Questions (15 minutes)

- Knowing the case allows for questions pertinent to the case
 - *"What do I need to know about the situation?"*
- Problem (possible considerations)
 - *"Who or what is the subject of the problem?"*
 - *"What is the problem?"*
 - *"Are you accounting for a failure, success or something more ambiguous?"*
 - *"What is the significance of the problem?"*
 - *"Who is responsible for the problems?"*
- Decision
 - *"What are the decision options?"*
 - *"Are they strong or weak?"*
 - *"What are possible criteria?"*
- Evaluation
 - *"Who or what is being evaluated?"*
 - *"Who is responsible for the evaluation?"*
 - *"What is the most important criteria for this criteria?"*
 - *Is the criteria explicitly mentioned in the case?*

Questions (15 minutes)

- After questions, you can study the case further
- “Content Inventory”
 - Purpose: Locate useful information!
 - Reading “*Headings*” (*Note: Cases are not linear*)
 - Information to answer questions will be located in different sections
 - Don’t ignore the *Exhibits*

Hypothesis (45 Minutes)

- After answering the questions – form a Hypothesis!
- The most important phase of Case Analysis
- Problem
 - Thoroughly understand the problem that needs to be diagnosed
 - Think about the framework most appropriate for the situation
 - Use the lens of the cause you are most certain about
 - If the case has quantitative evidence, only use that which is relevant
 - Consider if the protagonist is the potential cost

Hypothesis (45 Minutes)

- Decision
 - Review criteria and select that which you are most confident in pursuing
 - Review decision options. Community seem especially strong or weak?
 - Investigate the strongest option with the criteria you have the most confident
 - If the case contains qualitative, evidence which criteria do you feel is most relevant
 - If you don't have a criterion relevant to quantitative evidence, formulate one
 - Work up as much relevant, high-value quantitative evidence as you can
- Evaluation
 - Review criteria and select that which you are most confident in pursuing
 - What are the terms of the evaluation going to be? Do any stand out in the case?
 - Do you favor a bottom-line evaluation? Why? Pursue those reasons
 - Start by applying the criterion
 - Investigate positive and negative of the criterion
 - If you don't have a criterion relevant to quantitative evidence, formulate one
 - Work up as much relevant, high-value quantitative evidence as you can

Proof and Action (40 Minutes)

- Hypothesis drives approach
- Prove something, don't look for something to prove
- Review evidence and identify that which supports your hypothesis
- Action – how would you implement your recommendations?
- What action is your diagnosis or evaluation called for?

Alternatives (15 Minutes)

- Though paradoxical, question your own hypothesis: *What is the greatest weakness of the hypothesis? What is the strongest alternative to it?*
- The purpose is to step back and critically review your hypothesis and evidence
- What if my hypothesis is wrong?
 - Re-examine your hypothesis. Resists the urge to reconsider evidence
 - You may have overlooked important information
 - Was there a specific tool to be utilized more effectively?
 - In the end, you may have to realize the evidence just does not exist. Move on.but