



# **GUIDELINES ON HOW TO APPROACH AND ANSWER CASE STUDIES**

**2012**

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## PURPOSE OF THIS GUIDE

**As you will be using case studies in many of the IMM GSM's postgraduate courses, it is important that you get off to a good start by learning the proper way to approach and answer them. This guide is a compilation of many renowned practical publications on the subject of case studies which are acknowledged in the list of references.**

### **1. Defining case studies**

A case study is a description of an actual administrative situation involving a decision to be made or a problem to be solved. It can be a real situation that actually happened just as described, or portions have been disguised for reasons of privacy. Most case studies are written in such a way that the reader takes the place of the manager whose responsibility is to make decisions to help solve the problem. In almost all case studies, a decision must be made, although that decision might be to leave the situation as it is and do nothing. A case study presents an account of what happened to a business or industry over a number of years. It chronicles the events that managers had to deal with, such as changes in the competitive environment, and charts the managers' response, which usually involved changing the business- or corporate-level strategy.

A case is used to achieve a business goal. It is a hypothetical, yet realistic, business situation that is developed to give the student a sense of the types of business situations a manager or business owner may encounter on a daily basis; a case analysis prompt usually includes information on the business's employees, goals and values. The situation requires a decision to be made and a solution to be proposed. Through careful consideration and examination of the information, students personally determine what the best remedy for the problem that the business is facing will be. There is no single solution to the problem, but there is an array of plausible solutions that depend strictly upon the characteristics of the person (people) involved in the decision-making process.

## 2. The case study method as a learning tool

Cases provide the student with more than rote memorisation of facts. They give the student background, so that when placed in similar circumstances, he/she will know how to effectively evaluate the situation and arrive at a potential solution. Case analysis helps students to acquire two skills:

- **Applying theories** to real situations
- **Generating solutions** to real problems.

The **case method** is therefore a learning tool in which students and instructors participate in direct discussion of case studies, as opposed to the lecture method, where the instructor speaks and students listen and take notes. In the case method, students teach themselves, with the instructor being an active guide, rather than just a talking head delivering content. The focus is on students learning through their joint, cooperative effort.

Assigned cases are first prepared by students, and this preparation forms the basis for class discussion under the direction of the instructor. Students learn, often unconsciously, how to evaluate a problem, how to make decisions, and how to orally argue a point of view. Using this method, they also learn how to think in terms of the problems faced by an administrator. In courses that use the case method extensively, a significant part of the student's evaluation may rest with classroom participation in case discussions, with another substantial portion resting on written case analyses. For these reasons, using the case method tends to be very intensive for both students and instructor.

Case studies therefore prove valuable in a course for the following reasons.

- First, cases provide you, the student, with experience of organisational problems that you probably have not had the opportunity to experience firsthand. In a relatively short period of time, you will have the chance to appreciate and analyse the problems faced by many different companies and to understand how managers tried to deal with them.

- Second, cases illustrate what you have learned. The meaning and implication of this information are made clearer when they are applied to case studies. The theory and concepts help reveal what is going on in the companies studied and allow you to evaluate the solutions that specific companies adopted to deal with their problems. Consequently, when you analyse cases, you will be like a detective who, with a set of conceptual tools, probes what happened and what or who was responsible and then marshals the evidence that provides the solution. Top managers enjoy the thrill of testing their problem-solving abilities in the real world. It is important to remember, after all, that no one knows what the right answer is. All that managers can do is to make the best guess. In fact, managers say repeatedly that they are happy if they are right only half the time in solving strategic problems. Management is an uncertain game, and using cases to see how theory can be put into practice is one way of improving your skills of diagnostic investigation.
- Third, case studies provide you with the opportunity to participate in class and to gain experience in presenting your ideas to others. Instructors may sometimes call on students as a group to identify what is going on in a case and through classroom discussion the issues in and solutions to the case problem will reveal themselves. In such a situation, you will have to organise your views and conclusions so that you can present them to the class. Your classmates may have analysed the issues differently from you, and they will want you to argue your points before they will accept your conclusions; so be prepared for debate. This is how decisions are made in the actual business world.

As said earlier, instructors also may assign an individual, but more commonly a group, to analyse the case before the whole class. The individual or group probably will be responsible for a thirty- to forty-minute presentation of the case to the class. That presentation must cover the issues involved, the problems facing the company, and a series of recommendations for resolving the problems. The discussion then will be thrown open to the class, and you will have to defend your ideas. Through such discussions and presentations, you will experience how to convey your ideas effectively

to others. Remember that a great deal of managers' time is spent in these kinds of situations, presenting their ideas and engaging in discussion with other managers, who have their own views about what is going on. Thus, you will experience in the classroom the actual process of what goes on in a business setting, and this will serve you well in your future career.

If you work in groups to analyse case studies, you also will learn about the group process involved in working as a team. When people work in groups, it is often difficult to schedule time and allocate responsibility for the case analysis. There are always group members who shirk their responsibilities and group members who are so sure of their own ideas that they try to dominate the group's analysis. Most business negotiations take place in groups, however, and it is best if you learn about these problems now.

So, a case study helps students learn by immersing them in a real-world business scenario where they can act as problem-solvers and decision-makers. The case presents facts about a particular organisation. Students are asked to analyse the case by focusing on the most important facts and using this information to determine the opportunities and problems facing that organisation. Students are then asked to identify alternative courses of action to deal with the problems they identify.

### **3. How to approach a case study**

There are basically two situations you will have to prepare case studies for:

1. Class discussions and assignments; and
2. exams.

These two situations will be dealt with separately since they require different approaches.

## **3.1 Preparing case studies for class discussions and assignments**

### **3.1.1 Introduction**

While there is no one definitive 'case method' or approach, there are common steps that most approaches recommend be followed in tackling a case study. It is inevitable that different instructors will tell you to do things differently; this is part of life and will be part of working for others. This variety is beneficial since it will show you different ways of approaching decision making. What follows is intended to be a rather general approach, portions of which have been taken from an excellent book entitled, *Learning with Cases*, by Erskine, Leenders, & Mauffette (1997).

Although the following discussion primarily refers to class discussions, you should follow the same guidelines when preparing to answer a case study included in your assignments.

The process of preparing for a case study starts by you getting a case study beforehand with guiding questions to be answered about the case study, and (sometimes) additional reading assignments that have relevance to the case subject.

Your work in completing the case can be divided into three components:

1. What you do to prepare before the class discussion
2. What takes place in the class discussion of the case
3. Anything required after the class discussion has taken place.

For maximum effectiveness, it is essential that you do all three components. Here are the subcomponents, in order. They will be discussed in more detail shortly.

#### **3.1.1.1 Before the class discussion:**

- Read the reading assignments (if any).
- Use the Short Cycle Process to familiarise yourself with the case.
- Use the Long Cycle Process to analyse the case.
- Usually there will be group meetings to discuss your ideas.
- Write up the case (if required).

### 3.1.1.2 In the class discussion:

- Someone will start the discussion, usually at the prompting of the instructor.
- Listen carefully and take notes. Pay close attention to assumptions. Insist that they are clearly stated.
- Take part in the discussion. Your contribution is important, and is likely a part of your evaluation for the course.

### What you should expect

If you have read the case thoroughly, identified the business problems, rank-ordered the critical issues, proposed various solutions, and then identified how you will implement and communicate them, you can expect to be more or less as well prepared for classroom case discussion as your classmates. Here's what else you should expect:

- *An occasional cold call.* Be prepared for your lecturer to ask you to provide key details from the case, sometimes referred to as a 'shred'. Simply explain what happened in the case, identify the business and its principals, and give your best thinking on critical issues in two minutes or less. Do not worry about providing a solution just yet. Your lecturer is likely to want a more thorough discussion of the issues first. If you are feeling especially confident, you may wish to volunteer.
- *A logical, step-by-step approach.* If classmates offer information that is useful but not relevant or in line with the question the professor asks, expect the discussion to return to the issues the lecturer thinks are most important before you move on.
- *Different approaches from different lecturers.* No two lecturers are exactly the same in their approach or preferences. Virtually all of them, however, appreciate a bold, 'do something' approach over hedging, caution, and a reluctance to act.

## What you should not expect

- *More information.* From time-to-time, your lecturer will present you with a 'B' case that offers new or subsequent information. Such cases represent an extension of the facts in the 'A' case and usually provide another managerial decision opportunity. For the most part, though, the information given in the 'A' case is all you will have and you must make do with that.
- *A 'right answer'.* Because case studies are most often based on real events, no one can say for certain what would have happened if your ideas or other, 'better' ideas had been implemented. Some solutions are clearly better than others, but many ideas will work. Some of the very best ideas may not yet have been thought of or spoken aloud.
- *An explanation of what 'actually happened'.* Many lecturers either do not know what happened to the managers and the businesses described in your case studies, or they do not think that your having that information will be useful or productive in the learning process. Your own thinking may be limited or skewed if you focus on actual outcomes.
- *A single discipline focus to each case.* While some cases are principally about marketing, they may contain issues related to finance, operations management, human resources, or communication. Authentic business problems are rarely, if ever, one-dimensional. The more you are willing to think about other dimensions of business and their interdependency, the more you will learn about how real businesses work.
- *That your response will solve all of the problems in the case.* Focus on the most important, most urgent, and most relevant problems first. You may wish to identify issues for further thought or investigation by the management team described in the case, but you cannot and should not try to solve all the problems in the case.

In summary, your task is to read, identify and understand the business problems in the case. By identifying, rank-ordering, and exploring the critical issues it contains, you should be able to propose a workable solution, identifying how to implement and communicate it. From that point forward, you must explain your choices in writing and be ready to defend them in the classroom.

### **3.1.1.3 After the class discussion:**

- Review ASAP after the class. Note what the key concept was and how the case fits into the course.

### **3.1.2 Preparing a case study**

It helps to have a system when sitting down to prepare a case study as the amount of information and issues to be resolved can initially seem quite overwhelming. Remember, you are required to produce a case solution that demonstrates you are ready for management-level responsibility.

The following is a good way to start.

#### **3.1.2.1 The Short Cycle Process**

- **Quickly read the case.** If it is a long case, at this stage you may want to read only the first few and last paragraphs. You should then be able to:
- **Answer the following questions:**
  - Who is the decision maker in this case, and what is their position and responsibilities?
  - What appears to be the issue (of concern, problem, challenge, or opportunity) and its significance for the organisation?
  - Why has the issue arisen and why is the decision maker involved now?
  - When does the decision maker have to decide, resolve, act or dispose of the issue?
  - What is the urgency to the situation?

- **Take a look at the exhibits** to see what numbers have been provided.
- **Review the case subtitles** to see what areas are covered in more depth.
- **Review the case questions** if they have been provided. This may give you some clues as to what the main issues to be resolved are.

You should now be familiar with what the case study is about, and are ready to begin the process of analysing it. **You are not done yet!** Many students mistakenly believe that this is all the preparation needed for a class discussion of a case study. If this were the extent of your preparation, your ability to contribute to the discussion would likely be limited to the first one quarter of the class time allotted. You need to go further to prepare the case, using the next step. One of the primary reasons for doing the short cycle process is to give you an indication of **how** much work will need to be done to prepare the case study properly.

### 3.1.2.2 The Long Cycle Process

At this point, the task consists of two parts:

- A detailed reading of the case, and then
- analysing the case.

#### 3.1.2.2.1 A detailed reading of the case

When you are doing the detailed reading of the case study, look for the following sections:

- **Opening paragraph:** Introduces the situation.
- **Background information:** Industry, organisation, products, history, competition, financial information, and anything else of significance.
- **Specific (functional) area of interest:** Marketing, finance, operations, human resources, or integrated.
- **The specific problem** or decision(s) to be made.
- **Alternatives** open to the decision maker, which may or may not be stated in the case.
- **Conclusion:** Sets up the task, any constraints or limitations, and the urgency of the situation.

Most, but not all case studies will follow this format. The purpose here is to thoroughly understand the situation and the decisions that will need to be made. Take your time, make notes, and keep focused on your objectives.

Therefore, the first step to a successful case solution is to read the case, carefully and with an eye for detail – more than once. Personality theorists tell us that some people are eager to get to the end of a story quickly. “Don’t bother me with details,” they say. “Just tell me what happened.” Such people, often dependent on *Cliffs Notes* and executive summaries will bypass the details of a case in order to reach a conclusion about what happened in the story. They are often reluctant to read the case attachments and will frequently avoid tables of numbers altogether.

Many arrive at conclusions quickly and begin formulating responses before they have all the facts. The less clever in this crowd see the details of a case as a nuisance; reading the facts will only interfere with their preparation of a response.

After you have read and thought about the issues in a case, if you are uncertain about what to do, read it again. As you mature in the experiences of business school, you will get better at this, but at first, your best defense against being surprised or frustrated by a case is to read it thoroughly.

Students typically want to either underline or highlight much of what is contained in a book chapter, reprint, or essay. Case studies, however, are constructed a bit differently. Textbook chapters are typically organised in a hierarchical fashion, with key points and sub-points listed in order of importance, carefully illustrated and summarised. Not so, with case studies, which are often simply arranged in chronological order. Textbooks usually proceed in logical fashion, with one concept building on others that came before it. Case studies, on the other hand, are seemingly chaotic; many events happen at once, order and discipline are sometimes missing, and key issues are not always self-evident.

Case studies may also contain substantial amounts of information in tabular form; annual revenues, product shipment rates, tons of raw materials processed, or cost data

organised by business units. To know what such data mean, you will have, to read the tables and apply what you have learned about reading a balance sheet, or about activity-based costing. You may find crucial information contained in a sequence of events or a direct quote from a unit manager. Sometimes you will discover that the most important issues are never mentioned by the principals in the case – they are simply ideas or tools that they weren't clever enough to think of, or didn't think were important at the time.

Your notes should focus on the details you will need to identify the business problems involved in the case, the issues critical to solving those problems, as well as the resources available to the managers in the case. Those notes will be helpful in producing a case solution.

#### **3.1.2.2.2 Analysing the case**

Analysing the case should take the following steps:

- A. Defining the issue(s)**
- B. Analysing the case data**
- C. Generating alternatives**
- D. Selecting decision criteria**
- E. Analysing and evaluating alternatives and selecting the preferred one**
- F. Developing an action/implementation plan**

What follows is a detailed discussion of these steps.

#### **A. Defining the issue(s)/problem statement**

The problem statement should be a clear, concise statement of exactly what needs to be addressed. This is not easy to write! The work that you did in the short cycle process answered the basic questions. Now it is time to decide what the main issues to be addressed are going to be in much more detail. Asking yourself the following questions may help:

#### **What appears to be the problem(s) here?**

- **How do I know that this is a problem?** Note that by asking this question, you will be helping to differentiate the symptoms of the problem from the problem

itself. **Example:** While declining sales or unhappy employees are **a problem** to most companies, they are in fact, **symptoms** of underlying problems, which need to be addressed.

- **What are the immediate issues that need to be addressed?** This helps to differentiate between issues that can be resolved within the context of the case, and those that are bigger issues that need to be addressed at another time (preferably by someone else!).
- **Differentiate between importance and urgency for the issues identified.** Some issues may appear to be urgent, but upon closer examination are relatively unimportant, while others may be far more important (relative to solving our problem) than urgent. You want to deal with important issues in order of urgency to keep focused on your objective. Important issues are those that have a **significant** effect on
  - ❖ profitability,
  - ❖ strategic direction of the company,
  - ❖ source of competitive advantage,
  - ❖ morale of the company's employees, and/or
  - ❖ customer satisfaction.

The problem statement may be framed as a question, e.g.: What should Joe do? Or How can Mr. Smith improve market share? Usually the problem statement has to be rewritten several times during the analysis of a case, as you peel back the layers of symptoms or causation.

## **B. Analysing case data**

In analysing the case data, you are trying to answer the following:

- **Why or how did these issues arise?** You are trying to determine cause and effect for the problems identified. You cannot solve a problem that you cannot determine the cause of! It may be helpful to think of the organisation in question as consisting of the following components:

- **resources**, such as materials, equipment, or supplies, and
- **people** who transform these resources using
- **processes**, which creates something of greater value.

Now, where are the problems being caused within this framework, and why?

- **Who is affected most by these issues?** You are trying to identify who are the relevant stakeholders to the situation, and who will be affected by the decisions to be made.
- **What are the constraints and opportunities** implicit to this situation? It is very rare that resources are not a constraint, and allocations must be made on the assumption that not enough will be available to please everyone.
- **What do the numbers tell you?** You need to look at the numbers given in the case study and make a judgment as to their relevance to the problem identified. Not all numbers will be immediately useful or relevant, but you need to be careful not to overlook anything. When deciding to analyse numbers, keep in mind why you are doing it, and what you intend to do with the result. Use common sense and comparisons to industry standards when making judgements as to the meaning of your answers to avoid jumping to conclusions. Enough cannot be said about the analysis of case data since the extent of your analysis will either steer you away from or towards the optimal solution for the case problem(s).

In each case, at least one fundamental business problem is present. It may be a small, tactical issue, such as how this company will collect money from a delinquent customer. However, the issue may be broader in nature: “How can they reduce accounts receivable ageing to 30 days or less?” Larger, strategic problems might involve the company’s chronic, critical cash-flow difficulties. “If this company were no longer cash-starved, what longer-term opportunities might open up?”

You may identify more than one problem in a case. Complex cases often involve several such problems simultaneously. They may be technical in nature and involve accounting or cost control systems. They may involve the use of technology. You might see supply-chain problems in the business you are studying. You may identify

marketing deficiencies. Alternatively, you might see human problems that involve supervision, communication, motivation, or training.

Once you have identified one or more business problems present in the case, think about the outcome(s) you would most hope to see for the company and people you have read about. If you were asked to consult on this company's problems – and that is the role, most business students are playing as they read a case study – what results would you hope for? Do not limit your thinking to what the company should *do*, but what the most *successful outcome* would look like. Be specific about how the company will know if they have succeeded. Quantify the desired results whenever you can. Identify the critical issues that are at the heart of the case. If you miss a critical issue, you may not be able to solve the case to the satisfaction of your lecturer.

- ***Some issues are interdependent.*** That is, a solution to one issue might necessarily precede or depend on another. In a product-contamination case, for example, a media relations team cannot draft a press release until the production or packaging team knows what is wrong with the product. The team responsible for a new product launch cannot make final advertising and promotion decisions until issues related to packaging, transportation, and distribution have been solved.
- ***Some issues are more important than others are.*** A company may have a great opportunity to launch a product line extension, but not have sufficient market research data to support the idea. More to the point, they may not have the talent on staff to understand and properly use such data. Thus, hiring a market research chief might be more important than simply contracting with an outside firm to find the data.
- ***Each issue has a time dimension.*** While two problems may be equally important to the success of a company, one may be near-term in nature while the other is long-term. Setting up a corporate website may be important, but it will not solve the longer-term issue of marketing strategy: Should we sell direct over the web or use retail partners to market our

products? Specify which problems must be addressed first, but think, as well, about the duration of the solutions – how long will it take to fix this?

➤ ***Some issues are merely symptoms of larger or deeper problems.***

Two managers in open warfare with each other about budget or resource issues may be symptomatic of more serious, long-term budget problems, inadequate communication among the management team members, or perhaps a corporate culture that encourages confrontation over minor issues. When Sears-Roebuck & Co. discovered that auto service managers in California were charging customers to replace parts that were not yet worn out, the problem was deeper than a few overzealous managers were. After analysing the complaints brought by the California Attorney General, Sears realised that their compensation system rewarded managers for selling more parts, and not for simply servicing customers' vehicles.

Accept the fact that much of the information contained in the case will not be useful to your analysis. You should also accept the fact that you will never know all that you would like in order to produce a solution. Life is like that. So are case studies. Identify the relevant facts contained in case and think carefully about them. Identify additional information you might like to have – that might be part of your solution – but do not dwell on it.

Separate facts from assumptions. Recognise that there are some things you will know for sure and others that you will not. Recognise further that you may be required to subjectively interpret some evidence and to assume other evidence not directly stated in the case. The more suppositions you make, however, the weaker your analysis becomes.

You should be able to describe the problem or challenge in one or two sentences. You should be able to explain how this problem affects the strategy or performance of the organisation. You will need to explain why the problem occurred. Does the problem or

challenge facing the company come from a changing environment, new opportunities, a declining market share, or inefficient internal or external business processes? In the case of information systems-related problems, you need to pay special attention to the role of technology as well as the behaviour of the organisation and its management. Information system problems in the business world typically present a combination of management, technology, and organisational issues. When identifying the key issue or problem, ask what kind of problem it is: Is it a management problem, a technology problem, an organisational problem, or a combination of these? What management, organisational and technology factors contributed to the problem?

- To determine if a problem stems from management factors, consider whether managers are exerting appropriate leadership over the organisation and monitoring organisational performance. Consider also the nature of management decision making: Do managers have sufficient information for performing this role, or do they fail to take advantage of the information that is available?
- To determine if a problem stems from technology factors, examine any issues arising from the organisation's information technology infrastructure: Its hardware, software, networks and telecommunications infrastructure, and the management of data in databases or traditional files. Consider also the whether the appropriate management and organisational assets are in place to use this technology effectively.
- To determine the role of organisational factors, examine any issues arising from the organisation's structure, culture, business processes, work groups, divisions among interest groups, relationships with other organisations, as well as the impact of changes in the organisation's external environment – changes in government regulations, economic conditions, or the actions of competitors, customers, and suppliers. You will have to decide which of these factors, or a combination of factors, is most important in explaining why the problem occurred.

### C. Generating alternatives

This section deals with different ways in which the problem can be resolved. Typically, there are many and being creative at this stage helps. Things to remember at this stage are:

- **Be realistic!** While you might be able to find a dozen alternatives, keep in mind that they should be realistic and fit within the constraints of the situation. The alternatives should be mutually exclusive, that is, they cannot happen at the same time.
- **Not making a decision pending further investigation** is not an acceptable decision for any case study that you will analyse. A manager can always delay making a decision to gather more information, which is not managing at all! The whole point to this exercise is to learn how to make good decisions, and having imperfect information is normal for most business decisions, not the exception.
- **Doing nothing** as in not changing your strategy can be a viable alternative; provided it is being recommended for the correct reasons, as will be discussed below.
- Avoid the *meat sandwich* method of providing only two other clearly undesirable alternatives to make one reasonable alternative look better by comparison. This will be painfully obvious to the reader, and just shows laziness on your part in not being able to come up with more than one decent alternative.
- Keep in mind that any alternative chosen will need to be implemented at some point, and if serious obstacles exist to successfully doing this, then you are the one who will look bad for suggesting it.

Remember, every problem lends itself to more than one solution. Keep looking for good ideas, even when you have already thought of one that will solve the problem. Listing possible solutions is a form of brainstorming that will later permit you to assign values or weights to those ideas: is one solution less expensive than another is? Will one be more effective than another will? Will one idea work more quickly? Will one of these ideas have a more enduring effect? Once the alternatives have been identified, a method of

evaluating them and selecting the most appropriate one needs to be used to arrive at a decision.

#### **D. Key decision criteria**

How you are going to decide which alternative is the best one to choose? Other than choosing randomly, you must always employ some criteria in making any decision. Think about the last time that you make a purchase decision for an article of clothing. Why did you choose the article that you did? The criteria that you may have used could have been:

- Fit
- Price
- Fashion
- Colour
- Approval of friend/family
- Availability.

Note that any one of these criteria could appropriately finish the sentence; ***the brand/style that I choose to purchase must....*** These criteria are also how you will define or determine that a successful purchase decision has been made. For a business situation, the key decision criteria are those things that are important to the organisation making the decision, and they will be used to evaluate the suitability of each alternative recommended.

#### **Key decision criteria should be:**

1. Brief, preferably in point form, such as
  - ❖ improve (or at least maintain) profitability,
  - ❖ increase sales, market share, or return on investment,
  - ❖ maintain customer satisfaction, corporate image,
  - ❖ be consistent with the corporate mission or strategy,
  - ❖ within our present (or future) resources and capabilities,
  - ❖ within acceptable risk parameters,

- ❖ ease or speed of implementation,
  - ❖ employee morale, safety, or turnover,
  - ❖ retain flexibility, and/or
  - ❖ minimise environmental impact.
2. Measurable, at least to the point of comparison, such as alternative A will improve profitability more than alternative B.
  3. Be related to your problem statement, and alternatives. If you find that you are talking about something else, that is a sign of a missing alternative or key decision criteria, or a poorly formed problem statement.

Students tend to find the concept of key decision criteria very confusing, so you will probably find that you rewrite them several times, as you analyse the case. They are similar to constraints or limitations, but are used to evaluate alternatives.

### **E. Evaluation of alternatives and selecting the preferred one**

If you have done the above properly, this should be straightforward. You measure the alternatives against each key decision criteria. Often you can set up a simple table with key decision criteria as columns and alternatives as rows, and write this section based on the table. Each alternative must be compared to each criteria and its suitability ranked in some way, such as met/not met, or in relation to the other alternatives, such as better than, or highest. This will be important to selecting an alternative. Another method that can be used is to list the advantages and disadvantages (pros/cons) of each alternative, and then discuss the short and long-term implications of choosing each. Note that this implies that you have already predicted the most likely outcome of each of the alternatives. Some students find it helpful to consider three different levels of outcome, such as best, worst, and most likely, as another way of evaluating alternatives.

After assigning weights and values to the various solutions you have thought about, select the one you like best and prepare to defend it. Show why the ideas you have thought about are superior and how they will work. If you have rejected other more obvious ideas, you may want to explain why.

## **F. Recommendations**

You must have one! Business people are decision-makers; this is your opportunity to practice making decisions. Give a justification for your decision. Check to make sure that it is one (and only one) of your alternatives and that it does resolve what you defined as the problem.

**Decide how to implement the best solution.** Having good ideas is insufficient. You must be able to put them to work. Graduate students of business are often praised by executives for being theoretically well grounded, but criticised for lacking practical application. “A team of young MBA’s told me that we needed to sell this division of my company,” said an executive in the chemical industry. “But they couldn’t tell me what to do or how to go about it. All they knew was that we should try to find a buyer. Interesting,” he concluded, “but not very helpful.”

**Explain how to communicate the solution.** In a management communication case study, you will be asked to identify key audiences for your message. That means identifying which groups you want to communicate with and the means you will use to reach them. Think carefully about the broad range of stakeholders in the case: employees, customers, shareholders, business partners, suppliers, regulators, and the market-place-at-large. Identify exactly how you would plan to transmit your message, assure that it has been received and understood, and how you would analyse feedback from those audiences. You should think, as well, about timing and sequencing of messages. Whom should you speak with first? Who should send the message? How should this particular audience hear about this particular message?

**Write it up.** Different lecturers will have different expectations about what they want from you in a written case solution. They will probably not provide you with specific, detailed instructions regarding their expectations, but they will certainly tell you if you have missed the boat or have produced a solid response. Some will ask for wide-ranging responses that cover many issues, while others will expect a more focused response. Just provide your lecturer with your best thinking and be as detailed as you

think you can within the page limits you have been given. The report should at least have the following sections and in this order:

1. **Title page**
2. **Table of contents**
3. **Executive summary**
4. **Problem (issue) statement**
5. **Data analysis**
6. **Key decision criteria**
7. **Alternatives analysis**
8. **Recommendations**
9. **Action and implementation plan**
10. **Exhibits**

#### **Notes on written reports:**

Always remember that you will be judged by the quality of your work, which includes your written work such as case study reports. Sloppy, disorganised, poor quality work will say more about you than you probably want said! To ensure the quality of your written work, keep the following in mind when writing your report:

- **Proofread your work!** Not just on the screen while you write it, but the hard copy after it is printed. Fix the errors before submitting.
- Use spell checker to eliminate spelling errors.
- Use grammar checking to avoid common grammatical errors such as run on sentences.
- Note that *restating of case facts* is not included in the format of the case report, nor is it considered part of analysis. Anyone reading your report will be familiar with the case, and you need only to mention facts that are relevant to (and support) your analysis or recommendation **as you need them**.
- If you are going to include exhibits (particularly numbers) in your report, you will need to refer to them within the body of your report, not just tack them on at the end! This reference should be in the form of supporting conclusions that you are

making in your analysis. The reader should not have to guess why particular exhibits have been included, nor what they mean. If you do not plan to refer to them, then leave them out.

- Write in a formal manner suitable for scholarly work, rather than a letter to a friend.
- Common sense and logical thinking can do wonders for your evaluation!
- You should expect that the printer **would not** be functioning in the twelve hours prior to your deadline for submission. **Plan for it!**

**Proofread your work!** This cannot be stressed enough. If you do not feel that you are a good proofreader, have someone else read it through. Often we are too close to a report and do not see simple spelling errors. Or put it aside and go back a day later – this can make all the grammatical mistakes more obvious. Fresh eyes may see more mistakes than tired ones!!

**ANNEXURE A** GIVES EXAMPLES OF CASE STUDIES AND THEIR SOLUTIONS (pdf. documents)

## **3.2 Preparing for and writing a case study exam**

### **3.2.1 Exam writing skills**

It is not uncommon for students to call on counselling services for help in learning how to write exams. Case study exams in particular can pose difficulties for students who have otherwise studied diligently to learn their course material. Although exams give a student the opportunity to show that they have learned the course learning objectives, a weakness in test-taking skills can result in exam scores that are below the student's potential. In other words, 'exam-wiseness' can significantly affect your exam scores. Educational research has shown that by learning exam-taking skills students can often improve their test scores by 10-15 percentile points, and in some cases even more. Therefore, the good news is that these academic skills can be learned. Let us look at some ways to improve your exam results.

### 3.2.1.1 Study

First, there is no magic system for taking exams that is a substitute for studying and learning the course content. Read the IMM GSM's learner guide on "**How to Prepare for and Write an Open Book Exam**" for some studying guidelines.

### 3.2.1.2 Prepare

It makes sense that you should prepare yourself to write your exams. Appropriate preparation for your exams includes not only regular and thorough reviews of your course materials in order to ensure that you have covered the course learning objectives, but also:

- Be familiar with the expectations and IMM regulations governing exams, including ordering and paying for exams, unwritten exams, supplemental exams, and appealing exam results.
- Know when and where you will write your exam. Schedule your study time and course reviews to peak just before your exam. When students misjudge the timing of their studying and/or ordering of exams they can end up scrambling to coordinate their efforts in a way that increases their stress and anxiety, something that can be disruptive to a more appropriate exam-taking state of mind.
- Tackle exam anxiety early in the course rather than later or not at all if you know that exam anxiety detracts from your ability to do your best on exams.
- Prepare yourself physically and emotionally to write your exam. These include things that seem more obvious but are overlooked with surprising frequency.
- Get a good night's sleep before the exam rather than staying up late in order to cram.
- Have an appropriate (for you) breakfast before a morning exam or lunch before an afternoon exam.
- Arrive early enough to write so you can get yourself into your best exam-writing state of mind, but neither too early nor at the last second.

### **3.2.1.3 Exam taking skills**

With a solid foundation of effective study skills and proper exam preparation under your belt, we are ready to look at some strategies of 'exam-wiseness'.

## **3.2.2 Exam strategies**

### **3.2.2.1 Exam time management strategies**

Running out of time because of spending too much time on a few questions and therefore missing the opportunity to earn easier marks on later questions happens unfortunately too often. Here are some ways to avoid that pitfall.

- Take a few moments to get an overview of the exam, looking at each page to get a sense of the questions, seeing how many pages there are in the exam booklet, and what the total number of questions is. This overview allows you the perspective to plan your strategies for tackling the exam. In particular, note whether every question is worth the same number of marks or not. If not, you will have to balance a strategy of doing the easy questions first and quickly versus spending more time on the harder, more valuable questions.
- Divide the total number of minutes of the exam (e.g. a 2-hour exam = 120 minutes) by the total number of questions on the exam. This will give you an estimate of the average number of minutes you can take per question. Some questions will take less time, some will take more. Based on this number, make a mark beside the question number, which you think you should have reached by the end of the first hour (and the second hour if you are allowed more than two hours). This will tell you whether you are on schedule to finish the exam on time, are ahead of time and can focus longer on more difficult questions, or behind time and must focus on the questions you can answer with quicker certainty. You should bring a watch or clock in order to regularly monitor the exam time remaining.
- Generally, your strategy should be to read each question closely yet quickly, then answer the ones you are fairly sure of, but place a mark beside questions that will take more thought, and then move on to the next question. Do not worry about the questions you do not answer at first because you will come back to them.

Having read the harder question, your subconscious mind can be making connections and your memory can be stimulated by information in other questions you read as you move through the exam. Then, when you return to the unmarked questions, you will more likely be in a more primed state of mind to answer them.

- Do not rush yourself into choosing your answer too soon. Even if one of the answers is the one you expected from the question, take time to read the other alternatives in case there is an even better answer.

### **3.2.2.2 Question-reading strategies**

Not taking enough time to read each question closely can cause you to miss key words and therefore choose a wrong response. Here are some guidelines for reading each question.

- If the question uses confusing grammar such as double negatives, say the question to yourself in the positive.
- Underline key words in the question so they stand out from other possibly distracting words and help you get clear on what is being asked.
- Since 'distractors' may be intentionally inserted into the question to test your ability to sort the useful information from the useless, try to get a sense of what is relevant and what is not in the wording of the question.
- If none of the alternatives fit the question, go back and re-read the question to emphasise more precisely what the question is asking for and then re-read the alternative answers.
- Note words in the question such as 'not', 'always', 'never', 'everyone', etc. These specific qualifiers should guide your choice of answer.
- Note whether the question is asking for only one answer or whether several or all the answers could be correct.

### 3.2.2.3 Thinking strategies

A common study skills error is for students to think they understand a piece of information when, in fact, they can only recognise it. While some questions are written to test the student's recognition memory, other questions demand higher-level thinking processes such that the question may not even be recognisable from the specific course content yet can be answered correctly by thinking about the course concepts in ways other than simple recognition. Exam preparation study methods and exam-writing strategies should both include these types of information processing in order to best answer questions that assess how well you have learned the material. The following are types of information processing.

- Recognition – being able to recognise important facts is a necessary part of learning. Recognising something is different, however, from producing it without any external cues. If your study method requires you to do the latter, then you will be better equipped for questions that go beyond simple recognition. For example, if you find that you consistently have difficulty distinguishing between two similar answers, then your studying may be focused on recognition rather than conceptual understanding. Similarly, if you only memorise the words of a definition but do not emphasise the concept, then a test question may state the concept in new words. Will you be able to recognise the concept or just the words from the text?
- Analysis – assessing your understanding through these kinds of questions may involve separating out parts of theories or ideas, possibly requiring you to contrast several different parts in order to choose the right answer.
- Integration – questions of this type require you to make connections between different pieces of information. This may involve comparing similarities, perceiving a more theoretical linkage, or seeing the larger picture that encompasses the pieces of information provided in the question.
- Transfer – a deeper level of learning can be assessed by questions that require you to apply the course information to new situations or in new ways that may not have been covered in the text. If you understand the ideas, then you will be able to choose answers that use the course concepts in different situations/ways.

### **3.2.2.4 Selection strategies**

Over the years, students have evolved many different approaches to questions. Here are some of them.

- It is okay to take a few moments to recall pieces of information related to the question since this will assist your memory in linking to other relevant course content that will likely make your answer choice more obvious.
- Check the wording of the question.
- Be cautious with alternatives that you remember reading in the text.

**So, you've been to your tuition, you've read the advance information hundreds of times and the material to take with you into the exam...you're ready, right?** Well, nearly. In addition to the above guidelines, here are some more examination pitfalls to avoid.

### **3.2.2.5 Go to the right exam hall**

Let us start with a simple one. Do not follow your friend to a certain hall just because you have both been there. The hall allocation system is not very sophisticated; the only factors taken into consideration are your seating choices. This is done on a session-by-session basis so always check how to find the address of your exam hall. Please do not be the person who arrives at an exam hall late although the invigilators will do their best to allow you to sit but it is a very stressful way to start the exam.

### **3.2.2.6 Read the instructions to candidates document**

This is published on the IMM GSM website alongside your admission details. It is updated with every minor point but sometimes with something more important (like the change to black pens only).

### **3.2.2.7 Hot (or cold) outside does not mean hot (or cold) inside**

One of the major complaints received after examinations are the conditions within the exam. It is not uncommon to get 'too hot' and 'too cold' complaints from the same hall

on the same day. If the temperature is 25 degrees outside on exam day wear a t-shirt, but remember that your exam hall will be chilly after sitting still for 4 hours. Equally, if it is cold and rainy do not assume heat inside the exam hall. The key is layers of clothes that you can add/take away as necessary.

### **3.2.2.8 Take your own clock**

Although every hall should have a clock, you may not be able to see it easily from your seat. Take your own watch or clock, and set it so it matches the one used to time the exam. Timing is key in any exam and particularly the case study; it can become very stressful as the minutes tick by.

### **3.2.2.9 Do not expect it to be silent**

Everyone wants exam halls with good transport links, easy parking and facilities nearby. This is usually in the middle of a town or city, probably in a hotel or conference centre, so it will not be completely silent. If you are easily distracted, take earplugs (preferably not ones linked together with string; invigilators might want to check them during the exam!)

### **3.2.2.10 Talk to the invigilators**

Invigilators are there to make sure everything goes smoothly for you, as well as according to the rules. If you are uncomfortable with something (e.g. the sun is in your eyes, your desk is in a cold spot (the open window next to you is distracting you) stick your hand up and tell them. They might be able to do something – at least they can note it down should you need to apply for special consideration. If you do have a problem, such as illness or a disturbance during the exam (or just before it) you can request special consideration.

### **3.2.2.11 Listen to the invigilators**

Do what the invigilators say. This is particularly important at the end of the exam, when you must submit your script, including page numbers or your candidate number. The

reason for this is that the invigilator may think that you are altering your answer, especially if they spot you at a distance.

### **3.2.2.12 Do not expect tutor sized desks**

**You** know how big exam desks are, in the case study they are no larger than any other exam. Your exam pad, exam paper, advance information, lucky mascot and all your preparation notes must be juggled onto this desk. Remember, the aisles are fairly narrow, and the invigilators need to walk up and down them. In the event of a fire, know your way to safety.

### **3.2.3 Answer formats**

During exams, case studies have a list of questions you must answer. Depending upon the nature of the question, you may have to shape the format of your answer, which could be

- short answers,
- essay answers,
- multiple choice answers, and
- open book answers.

What follows is a brief analysis of the nature of these answer formats.

#### **3.2.3.1 Short answers**

Short answer exams tend to require answers that are a sentence or paragraph long. They mainly focus on knowledge and understanding of terms and concepts of the subject. Here is a template for preparing for questions requiring short answers. Breaking unit notes into these categories as you are revising will help you to recall the information and explain it thoroughly in the exam.

Key concepts/ terminology	Meaning in your own words	Issues that need to be explained or clarified	Example/ application

During the exam, first analyse the question so you are clear about exactly what it is asking.

- Divide the question into parts if needed
- Underline the topic words (**what** you are to write about)
- Circle the task words (**how** you are to write about)

**Example question:** In the case study, what is meant by the term Foreign Direct Investment? Describe the difference between the flow of foreign direct investment and the stock of foreign direct investment.

A. Divide the question if needed:

- What is meant by the term Foreign Direct Investment?
- Describe the difference between the flow of foreign direct investment and the stock of foreign direct investment.

B. Underline the key words:

- What is meant by the term Foreign Direct Investment?
- Describe the difference between the flow of foreign direct investment and the stock of foreign direct investment.

C. Circle the task words:

- What is meant by the term Foreign Direct Investment?

- Describe the difference between the flow of foreign direct investment and the stock of foreign direct investment.

D. Answer the question:

- A good short answer in an exam specifically answers the question in the first sentence. The rest of the paragraph is used to explain your answer.

### 3.2.3.2 Essay answers

The aim of essay answers is to show your ability to synthesise information and organise your thoughts on paper. The structure of your answer includes an introduction, body and conclusion in much the same manner as an assignment.

During the exam, in the same way as for short answers, first analyse the question so you are clear about exactly what it is asking.

- Divide the question into parts if needed
- Underline the topic words (**what** you are to write about)
- Circle the task words (**how** you are to write about)

Then structure your answer using an introduction, body and conclusion. The length of your essay and the amount of time spent on it should be equivalent to the number of marks assigned to the question. Direct your efforts where they will reap the richest reward. Common types of essay questions that can be asked are:

- Explanatory – you are asked to explain various aspects of a topic and uses task words like: describe, outline and explain.
- Interpretive – you are often given some form of data (e.g., scenarios, graphs, tables, pictures) and you are asked to apply your knowledge to interpret the information given. You need to write about the knowledge you have and the way it applies to this information.
- Argumentative – you are asked to take a position on a topic giving reasons for your views. You should also address any arguments that oppose your position.

The best way to prepare for essay questions is to write practice essays.

### 3.2.3.3 Multiple-choice answers

There are common misconceptions that these types of questions are not associated with case studies and that they are easy. They are however invaluable when choices are to be made from multiple possible solutions to problems.

Many students find the multiple choice format challenging as there are often numerous questions to answer in a short time frame and the wording can be quite confusing. For maximum success, you must understand the purpose of the questions and the principles behind the question structure.

Multiple choice questions are testing:

- Basic knowledge (facts, figures, definitions) and the best learning strategy is rote learning for memorisation
- The application of knowledge to a particular context and the best learning strategy is reading case studies and examples in textbooks
- Analysis, synthesis and evaluation, combining and using knowledge to address a 'real life' scenario and the best learning strategy is to collect and learn information in a table format so as to see distinctions and similarities between concepts.

Here are some tips for answering multiple choice questions:

- Start with the questions you can answer easily.
- Cover the answers and try to answer the question before looking at them.
- Lightly cross out the answers you know are wrong.
- Underline key words in the question.
- Read all the alternatives.
- Watch for key words like: totally, absolutely, all, never, only, always.
- Translate double negative statements into positive ones.
- Answer every question unless there is a penalty for wrong answers.

### 3.2.3.4 Open-book answers

Although the IMM GSM has published a separate guide on open book exams, some aspects are worthwhile repeating.

The myth has it that open book exams are easy because you have all the answers with you. The reality is that open book exams generally require more than formulaic answers. You must be prepared for them.

- You need to have a thorough general knowledge of the topics, which may be in the exam. Study your textbook, take notes and do the questions. Summarise your notes from lectures and readings. Develop an overview of the topics, which may be in the exam. Understand how they link together.
- You do not have a lot of time to look for information in the exam. You need to know exactly where everything is. Organise your notes into cards or pages. Use sticky notes or tags in your books.
- Questions in open book exams require complex answers. You are expected to give a considered answer using reason and evidence to back it up.
- During the exam, first analyse the question so you are clear about exactly what it is asking.
  - Divide the question into parts if needed
  - Underline the topic words (**what** you are to write about)
  - Circle the task words (**how** you are to write about it).

### 3.2.4 Case study processes during the exam

Regardless of the question format, there are three processes involved in successfully answering a case study during an exam, namely:

- A. Identification of issues and problems
- B. Solutions
- C. Recommendations

Remember that a case study is not just the recount of the issues and problems, it is **also** the detailing of solutions and recommendations, e.g. an action plan, to fix the problems the questions relate to. What follows is a discussion of the three processes.

### 3.2.4.1 Identification of issues and problems

There are three steps involved in the identification and analysis of issues and problems.

#### Step 1 – overview of the case study (background context)

Understanding the background issues helps to understand the context of the case study. **Read the case study to gain an overview, ask,** and answer the following questions as you read.

- What background facts influence the current problems the questions are referring to?
- What are the constraints or obstacles of the situation?

#### Step 2 – identifying the problems

Identifying the major problems and their causes at this stage is vital to identify appropriate solutions later. **Reread the case study and summarise or list the issues and/or problems in your own words.** Make sure you

- sort the **major problems** from the minor problems,
- identify **evidence** from the case study which relates to each of the problems, and
- identify underlying **causes** of the problems.

A useful strategy is to represent the problems and their relationships as a mind map.

#### Step 3 – linking theory to problems and case evidence

**Relating the identified issues and/or problems to theory is vital** when answering case studies. This is where you demonstrate your knowledge of the theory in your course and your ability to relate it to practical situations. Use your readings to select appropriate theories to match the identified problems. Integrating relevant theory into your case study answer is vital. This allows you to demonstrate how theory relates to

the actual issues/problems found in the case study, as well as to demonstrate your understanding of your course content.

### **3.2.4.2 Solutions**

This section evaluates **potential** solutions for the identified key problems. Often there is more than one solution, so it is useful to evaluate each solution in terms of its **advantages** and **disadvantages**. This will also assist in determining your recommendations. How you structure your analysis, is very important – it should be clear and concise. Use headings and subheadings where possible. Bullet points or numbered lists can also be used to list the advantages and disadvantages.

### **3.2.4.3 Recommendations**

This section should outline your recommendations based upon the given solutions for each of the questions (identified problems). It may also need to include an action plan, e.g. what should be done by whom and the associated timelines. Each recommendation should be realistic, i.e. practical and achievable, and be linked back to relevant and supporting theory.

### **3.2.5 How to write a case study**

The case studies you will be preparing and answering for class discussions, assignments and the exam, have already been written and compiled by someone else. However, sooner or later it will be expected of you to write a case study on some or other practical situation. This section explains how to write such a case study.

The first thing to remember about writing a case study is that the case should have a problem for the readers to solve. The case should have enough information in it that readers can understand what the problem is and, after thinking about it and analysing the information, the readers should be able to come up with a proposed solution. Writing an interesting case study is a bit like writing a detective story. You want to keep your readers very interested in the situation.

A good case is more than just a description. It is information arranged in such a way that the reader is put in the same position as the case writer was at the beginning when he or she was faced with a new situation and asked to figure out what was going on. A description, on the other hand, arranges all the information, comes to conclusions, tells the reader everything, and the reader really doesn't have to work very hard.

When you write a case, here are some hints on how to do it so that your readers will be challenged, will 'experience' the same things you did when you started your investigation, and will have enough information to come to some answers.

There are three basic steps in case writing: research, analysis, and the actual writing. You start with research, but even when you reach the writing stage you may find you need to go back and research even more information.

### **The research phase:**

- 1. Library and Internet research.** Find out what has been written before, and read the important articles about your case site. When you do this, you may find there is an existing problem that needs solving, or you may find that you have to come up with an interesting idea that might or might not work at your case site. For example, your case study might be on a national park where there have been so many visitors that the park's ecosystem is in danger. Then the case problem would be to figure out how to solve this so the park is protected, but tourists can still come. Or, you might find that your selected site doesn't have many tourists, and one reason is that there are no facilities. Then the case problem might be how to attract the right kind of businesses to come and build a restaurant or even a hotel – all without ruining the park.

Or your case study might be on historic sites that would interest tourists – if the tourists knew where the sites were or how to get to them. Or maybe your case study is about how to interest people in coming to your country so they can trace their family's historic roots (origins).

Once you have decided on the situation or issue you would like to cover in your case study (and you might have several issues, not just one), then you need to go to the site and talk to experts.

**2. Interview people who know the place or the situation.** Find

knowledgeable people to interview – they may be at the site itself or they work in a government office or company that deals with historic preservation. In addition to people who work at the site, talk to visitors.

When you are interviewing people, ask them questions that will help you understand their opinions, questions like the following:

- “What is your impression of the site (maybe it’s an old fort, or a burial site, or an excavation of historic interest)?”
- “How do you feel about the situation?”
- “What can you tell me about how the site (or the situation) developed?”
- “What do you think should be different, if anything?”

You also need to ask questions that will give you facts that might not be available from an article, questions like:

- “Would you tell me what happens here in a typical day?”
- “What kind of statistics do you keep? May I have a copy? How many businesses are involved here?”

When you ask a question that doesn’t let someone answer with a ‘yes’ or a ‘no’ you usually get more information. What you are trying to do is get the person to tell you whatever it is that he or she knows and thinks – even though you don’t always know just what that is going to be before you ask the question. Then you can add these facts to your case. Remember, your readers can’t go to your site, so you have to ‘bring it to them’.

**The analysis phase:**

**1. Put all the information in one place.**

Now you have collected a lot of information from people, from articles and books.

You can't include it all. So, you need to think about how to sort through it, take out the excess, and arrange it so that the situation at the case site will be understandable to your readers. Before you can do this, you have to put all the information together where you can see it and analyse what is going on.

**2. Assign sections of material to different people.**

Each person or group should try to figure out what is really important, what is happening, and what a case reader would need to know in order to understand the situation. It may be useful, for example, to put all the information about visitors on one chart, or on a chart that shows visitors to two different sites throughout a year.

**3. Try to formulate the case problem in a few sentences.**

When you do this, you may find that you need more information. Once you are satisfied with the way you have defined the problem you want your readers to think about and break the problem down into all its parts. Each one represents a piece of the puzzle that needs to be understood before the problem can be solved. Then spend some time discussing these with the others in your group.

**For example suppose:**

- a. Your heritage site doesn't have many visitors, but many people say they would like to visit if it had services.
- b. There is unemployment in the village around the site.
- c. The town is big enough to be able to accommodate many more visitors.
- d. The surrounding environment (animals, trees and plants) need to be protected from too many visitors.
- e. The town is far away, but there are no places to eat or sleep around there.
- f. The government owns the location, but the government does not want to own and operate either a restaurant or a hotel.

Ask yourselves: "How much information do people who will read your case study need to have in order to be able to discuss items **a** through **f**?"

One answer to ‘a’ is that they need to know data about past numbers of visitors, and they need to know what evidence exists that more people want to visit but are discouraged from going there. Your evidence will come from the articles and statistics you have gathered, and from the interviews you have completed.

Once you have broken down the problem into pieces, you can analyse the information you now have and see if you can think about possible answers to each of the pieces. If you have enough information, then you can think about how to write the case study itself.

### **Writing the case study:**

#### **1. Describe the problem or case question you want the reader to solve.**

In a detective story, the crime happens right at the beginning and the detective has to put together the information to solve it for the rest of the story. In a case, you can start by raising a question. You can, for example, quote someone you interviewed. For example, suppose you interviewed a tourist official and she told you she thought more people should be interested in visiting, and she can’t understand why they don’t come. Then you could write something like this:

*The historic town of XX is located in the mountains of country X. The town tourism supervisor, Mrs. Joan Smith, said that she thought “many more people should visit here, but they just don’t come. I don’t know why – maybe we don’t have the right kinds of places for them to eat or sleep and it’s too far to travel in one day from the nearest big city.” The case writers wondered what would have to happen in order to make the town more attractive to tourists.*

Because you are the authors, you and your fellow students can write questions like this and set the stage for the rest of your case story. What your introduction does is give clues to the reader about what they should be thinking about. Once you have told the reader what one person associated with the tourist area thinks the problem is – *how to make the place more attractive* – you can give them the information they need to come to their own conclusions.

## 2. Organise the sections of the case.

You will probably need to organise your information under topics like the following:

- a. **Introduction** to the problem
- b. **Background on the place** – where is it, how big, what climate, etc. – this part should be a brief, overall description. Think about having two pages of written material, photos, or even a video, so that your readers can really get a feel for what the place looks like. Summarise the main features of the place. What makes it special?
- c. **Visitors to the place** – you want to make the reader do some work, so you can say that the number of visitors are shown on a table or chart you have compiled. You might want to include a chart that shows the number of visitors that come to another similar kind of place that does have facilities. This will let your readers make some comparisons. If possible, include information you received when you talked to visitors – what did they like, dislike? What did visitors think should happen to make the place more attractive?
- d. **Government policy** – include information about what government policy is with respect to this place. What is allowed, what is not allowed. Can policy be changed, and by whom?
- e. **Business opportunities** – you have already said there are not enough facilities for tourists. Well, now you need to provide information on what it might cost to put in a nice restaurant for tourists. Suppose in one of your interviews, you talked to a businessperson who said that it would cost R25,000 to put a snack bar by the historic site. You need to give your reader that information, but that's not all. You also have to provide some information about what a typical snack bar menu would have, how much the food would cost to make and sell, and what price the owner would have to put on each item so that the price would not be too high for people to pay. And your reader has to figure out how many people would have to eat there in order for the snack bar to make money. This is where the statistics come in. Are there enough people who visit now that the snack bar could expect to make money? How about the number of visitors to the

other similar place – what if that same number of people came. How would the snack bar do then?

- f. **Potential employees.** You can't add facilities without adding people to staff them. Are there enough people in the local community to fill the new jobs that would be added? Do they have the right kind of education and training to fill those jobs, or would the snack bar owner, or the new hotel owner, have to train people, or bring people in from other locations? Could the local school system provide the necessary training?

You do not have to do all the calculations for the reader, but you need to do them yourself so that you know the reader will have enough information in the case to do them. For example, before you can decide whether a snack bar might be a good idea, you have to estimate whether you could get more visitors – and how many more. Can you match the number that go to the other similar place that has facilities? Or is your location so much further to travel that you don't think that many more people would come. And just how many people have to use the snack bar in order for the owner to get back his R25,000 investment and also make some profit to pay himself a salary? This kind of analysis is really looking at the question of what kind of business opportunities are there. Would a souvenir shop be a good idea?

Did you do this kind of analysis before writing? If not, then you will have to stop and think some more. Maybe you will need to find more information before you can continue writing.

- g. **Environmental implications for animal and plant life of changes in the area.** Since you already know that more visitors will cause a change, an important factor to consider is what will be the impact on plants and animals. Some places protect the plants by only letting visitors walk on special paths and visitors cannot pick any flowers or plants. Others say visitors can not feed the animals, or rules say visitors must hire a guide if they are going into certain areas. Whatever the situation, you need to consider this question very carefully.

**Other sections of the case.** Depending on the case you are researching and writing, the sections of the case will need to be organised so that each type of information is in its own section and understandable to the reader. You might not use all the sections described above, but certainly your case study will need to consider the business and economic implications of tourists for your area, and equally important, the implications for the plant and animal life. Tourism has economic implications and environmental implications. Good planning must take both into account.

**Conclusion.** Your case will need a conclusion. Rather than putting in your answer in the case, leave the reader with some more questions. For example, you might have learned that there is a government policy that says “*No private enterprise is allowed to change any part of the historic site.*” So you might conclude with a paragraph like this:

*The mayor and tourism minister discussed with the case writers whether or not it would be a good idea to prepare a plan for putting a snack bar inside the old fort without changing the way the building looks. The plan could be used to show the government that a policy change to allow private enterprise would be a good idea. “Is there enough value in adding jobs in the village?” asked one of the case writers. Another said, “I think there is enough evidence that expansion would be the right thing to do.” Still another case writer disagreed. What is your conclusion?*

By ending your case on a question like this, you let your readers discuss the situation themselves. If you have written a good case, they will have enough information to understand the situation and have a lively class discussion.

The whole purpose of writing cases and sharing them with others is to share experience without all of us actually having to be in the same place. There is a trade-off between developing a place to make it more accessible to tourist so local jobs can be created and on the other hand protecting the environment from too many visitors. And this is a question that faces more than one country. But how the trade-off is resolved can vary from country to country. One country’s solution might be useful for another country to know.

## **Making sure your case can be used in another country**

Since different countries have different languages and cultures, you need to prepare a *note for the instructor* giving additional background material that the teacher might need to know in order to help guide the student discussions.

It is often interesting to record any changes that actually occurred after or while the case was being researched and written. Once students have learned about a situation, they find it is very interesting to learn more. But this information should be separate from the case study so that it doesn't influence the class discussions.

If your case uses special terms, words, or refers to cultural customs that people in another country might not recognise, information about them should be put in the case (at the end in an appendix) or in the *note for the instructor*.

## **4. Conclusion**

After failing previously, Peter (not the person's real name) was delighted to achieve a mark of 60 in the May 2011 exam. We asked how he prepared for this attempt.

### **How did you approach your revision?**

**"I made sure I had the core skills:** I made my **practice purposeful**. One thing I had not done before was practice case studies repeatedly until it was like clockwork. Every second that you practice a question to time, is as if it was the real thing. I reassured myself I had the best teaching available. I also improved my studying techniques drastically."

### **Did you have tactics for keeping focused during your preparation phase?**

**"I maintained my work-life balance:** I planned adequate time for study but also made sure I had friends, and got fresh air. Detach from the study otherwise the sight of rules bores your brain. Use no alcohol, get to the gym (even the day before the exam), and sleep well. Do not work late. In terms of mental robustness, I found it important to

identify and deal with any areas of anxiety, take them for what they are and be mindful they exist but do not be afraid, you have a job to do – chin up.”

### **How did you approach the live exam?**

**“Preparation is important:** I turned up on the day one and half hours in advance. I sat in a café and literally wrote (short hand) some of the relevant facts. It got the information flowing through my mind, my brain switched on and settled.

**“Timing is also important:** Ultimately, all the questions are worth equal marks. I learnt to move on after my time on that section is done. Start afresh for the each section. I put a small box at the top right hand corner of my planning sheet for sub-sections of the question. This kept me on track and stopped me running over time.

**“Planning is essential:** Plan each answer in quite a bit of depth. I did okay at this previously but the rough work helped me to be regimented, ensured a flow to the answer, and covered all vital parts. I did not do a front cover or terms of reference. Spend time on what can get you the most marks for.

**“Self-belief:** Silly as it sounds I had a small flashcard with a few points that I read to myself in the exam while others gazed around and chit chattered. I once read that pro athletes do the same before a big event. They tell themselves repeatedly they can do it, literally convincing themselves.”

### **Any final words of advice for a student taking future exams?**

“For me the key changes I made between my failing attempts and passing were:

1. **Purposeful practice** – as much as it took for me to learn
2. Making sure I nailed **timing & planning**
3. Knowing and using **business concepts and issues**.

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# ANNEXURES

## **A: Case studies and their solutions (attached as pdf. Documents):**

- **Trane**
- **Classic Airlines**
- **IT Organisation**
- **Service Offering in Solution Marketing**
- **Developing a Rural Market e-hub**