

An Introductory Guide to Case Analysis

*Taken from the course website for Amy Wrzesniewski's Managing Organizations
<http://www.stern.nyu.edu/mgt/mo/wrzesniewski/>*

Many students find case analysis to be difficult due to the relative lack of structure of most management problems. No correctly answered list of questions or mechanical process will lead to the "right" answer. In fact, there is no "right" solution to most managerial problems. When analyzing a case, remember that there are many possible approaches and solutions. The goal is not to figure out "the answer" but to sharpen your analytic, problem-solving, and decision-making skills. The following steps outline the basic approach that you should follow when analyzing a case, whether for class discussion or in preparation for a written analysis.

First, read the assigned chapter and review the relevant power point slides. The material in the chapter and slides should play an important role in your analysis of the case. Remember that case analysis in this course is cumulative. Thus material from earlier chapters may be relevant and should be applied where relevant.

Second, read the case and the questions in the Case Preparation Guide. Take notes about the important issues that the case raises and the text material that seems to apply. The questions provided should be considered a guide to issues that you must consider but you will generally need to go beyond merely answering the questions to effectively analyze the case. The finished product should be an integrated analysis, not a sequential set of answers to the questions.

Third, analyze what is occurring in the case and why. You should be able to identify outcomes in the case and/or issues that the organization faces. These outcomes may be bad (e.g., shrinking market share, hostile employees, conflict among departments, inability to control operations), or they may be good. There may be numerous problems and issues. The goal of analysis is to explain the underlying mechanisms that are producing the outcomes or problems that you see in the situation. This process will require you to distinguish between symptoms and casual mechanisms. Consider the following example: You go to the doctor with the "problem" of a cough or a fever. It may be easy for the physician to treat the cough or fever with a number of medicines much like we could treat worker dissatisfaction by paying higher wages. However, it is important for the physician to determine the causes of the problem. If the cause of the cough is tuberculosis then only treating the cough is apt to lead to serious long-run consequences because the underlying disease process will still be at work. Clearly the cough is just a symptom of a deeper underlying problem, the disease of tuberculosis. Good analysis cleverly weaves symptoms into a causal map that gets to the underlying root of the situation. What your instructor will look for in your case analyses is the cogency of your explanation of the process leading to the symptoms. At the outset you are likely to struggle with this. It is a difficult and time consuming process to develop clinical skills.

Remember that specific cases are assigned because they present good opportunities to practice using theory and course frameworks. Therefore, you know in every instance that some theory in the assigned chapter and possibly other theories from earlier chapters must be applicable to the case. You will find theory and course frameworks essential for

supporting your analyses. You should view the theories as a way to explain the underlying causal mechanisms contributing to the outcomes in the case, and as a way to organize and justify your arguments. Be explicit in your use of course concepts and theories, but avoid the tendency to throw in course terminology merely as “buzzwords.” This is almost always obvious to the instructor and may hurt rather than help your grade.

Recognize that some cases do not have problems as such. The organization may be doing quite well. Cases are real-world situations, not necessarily examples of bad management. Don't make up problems when none exist. Take the situation for what it is rather than approaching it with a point of view. Be alert for the danger that some information in some cases is coming from biased participants and therefore must be taken with a grain of salt.

A characteristic of cases is that you never have all the information that you want and there is often considerable information that is irrelevant, trivial or even obfuscating. The absence of essential information may force you to make one or more assumptions. Assumptions should always be clearly labeled as such, they must be necessary and they must be realistic. In general, you should try to avoid assumptions.

Assume that your instructor has read the case and is aware of all the facts. Do not describe events in your written analysis. This is merely a waste of space. Rather, you should use material in the case to support your analysis or to provide examples to back up your arguments. Remember, your objective is to explain, not describe or report.

At the conclusion of each case analysis, you will need to offer recommendations for change, or recommendations for how the situation could have been better handled. Keep in mind that recommendations typically have both positive and negative consequences. For example, a solution may eventually work but be very costly, difficult to implement and take a long time to have a significant impact. You should develop the recommendation that has maximum positive impact and minimum negative consequences.

Recommendations should logically follow from the analysis and they should be feasible. For example, firing the boss and replacing her/him with a better manager may be a good "theoretic" solution but it may not be feasible in a given set of circumstances. Recommendations must be effective and efficient. Killing a fly with a bomb is effective but not efficient. Keep in mind that only 20% of your grade will be based on your recommendations. The remaining 80% will be based on your analysis. Space allocation should reflect this distribution.

Finally, make sure that your paper is well-written, clearly organized, and has a logical flow. Poor writing will affect your grade. It usually helps to provide a brief summary statement and “roadmap” at the beginning of the analysis to orient and guide the reader. Also make sure that any recommendations you provide follow directly from your analysis of the problem, and that your overall conclusions are consistent with your analysis.

Participating in Case Discussions

1. Keep in mind that there is usually more than one right answer. A case is a problem-solving situation, and managerial effectiveness often depends upon seeing different solutions.
2. Offer your ideas, substantiating them with facts from the case and course material.
3. Adopt an open-minded stance, entertain new ideas from others and consider how your recommendations might change in light of these new insights.
4. Listen to your classmates and build on what they have to say. Resist the impulse to focus so strongly on what you want to say next that you lose track of where the discussion has moved.
5. Be fearless, but professional and most important, respectful in questioning or disagreeing with a colleague. Case discussions are also an opportunity to refine interpersonal skills. "I see some drawbacks to your proposal" or "I'm wondering if you considered the effects of x on y" creates a much different climate than "You're wrong" or "That's not a good idea."
6. Write down new ideas that occur to you and make note of any theories or course concepts brought to bear that you did not apply in your analysis.
7. Evaluate the discussion and your participation in it. What could you do to improve in the next case discussion?