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## Guide to Case Analysis

Case analysis can be quite challenging. As a student, it is your responsibility to construct a coherent analysis using the tools that you have learned in your courses, from the textbook, and from journal articles. The first thing to remember is that the case you are analyzing was chosen because it is an exemplar. Typically, students are responsible for identifying the problems that are present within the case.

The second key to analyzing cases is to recognize that only information provided within the case is important and that current knowledge of the organization is usually irrelevant and can actually bias the analysis. Cases are typically a few years old, and you are expected to make conclusions based on information from a specific time period. This is especially important for cases on business strategy, whether they be focused on finance, accounting, marketing, operations, or human resources. An example of bias in the analysis would be to identify a strategy as weak simply because you know that the company no longer exists, without delving into specifics about the weaknesses.

Students should follow the instructor's guidelines for structuring the document. If there is no outline provided, the following is an effective structure that guides analysis:

1. Title Page with Executive Summary
2. Introduction
3. Analysis of the Problem
4. Decision Criteria and Possible Options
5. Recommended Solutions with Justification
6. Instructions for Implementation and a Contingency Plan
7. Conclusion

### The Executive Summary

An executive summary is similar to an abstract, and should be the last thing that is written before the paper is submitted. Typically, the summary consists of one or two paragraphs (maximum) that summarize the content of the paper. Within the first paragraph, identify the major discussion points and the strengths and weaknesses of the organization/case that you are analyzing. The second paragraph should inform the reader what the recommendations are, even if the recommendation is to continue with the organization's current path. You should provide a very brief justification for your recommendations.

### Table of Contents

Only include a table of contents if your instructor specifies to do so. Typically, using a pre-formatted table based on your headings throughout the paper is easiest. Include appendixes in the table of contents, but do not include your Executive Summary.

### Introduction

The introduction is very important in that it sets the tone for your analysis. In the introduction, be sure to clearly outline the key problem as well as the key manager/person who needs to resolve this problem.

Assume the reader is unfamiliar with the case, so provide a detailed, succinct overview of the case you are analyzing. Finally, you should identify the key long-term problems and differentiate them from the short term problems the key person/organization faces.

## **Analysis of the Problem**

The analysis is the heart of the case analysis, and is where you will briefly analyze everything in the case and provide the information that guided your analysis. Make sure to make use of sources. For example, if the case is in the field of Human Resources, you may want to refer to the Employment Standards Act or to Human Rights Legislation to show you analyzed the case competently using relevant information. Use the referencing style assigned by the instructor, research the specific style guide, and be consistent.

## **Decision Criteria and Possible Options**

This section is often one of the most poorly completed parts of a case analysis. This section should begin by clearly identifying the criteria you will use to create your recommendations. Typically, in a business course, the first criterion is always “Is the recommended solution cost effective?” This usually is at the crux of all business decision making, no matter the field. Other criteria must be included and are created on a case by case basis. After the criteria are established, you must provide the reader with two or three possible options. Students should make sure that all the options are feasible. In this section, you should clearly outline the pros and cons of every option so that in the Recommended Solutions section you can easily explain why your recommendation is the best.

## **Recommended Solutions with Justification**

Your recommendation is very important to the whole case. This is the section where you identify the best course of action that the key manager/person should take to resolve their issues. This is very important because by analyzing the case, you are acting as a consultant. Your recommended solution should be systematically chosen based on the criteria that you identified in the previous section. One caveat is that students often forget to ensure that their recommendations are: (1) guided by theory, (2) ethical, and (3) legally compliant. Other justifications vary by field.

## **Instructions for Implementation and Contingency Plan**

Once you have presented your recommended solution, you should identify an implementation plan. This section should include a general timeline for implementation, a list of resources required for implementation, and who will be involved in the implementation. A contingency plan should always be included. Typically, the best contingency plan is the second best alternative from the possible options that you presented. You should identify what the contingency plan would be and identify why this is the best alternative.

## **Conclusion**

Your conclusion should be a very short paragraph which summarizes the main problem and how you solved it with your suggested plan of action. If you can, highlight why it was important to examine this problem, and potentially how to avoid it in the future.