How to Solve a Case Study

Cases are included in many courses in Administrative Studies to give students an appreciation of the hard realities of business and the constraints involved in decision making. By exposure to a variety of situations and diverse problems, the student can experience, to some degree, the challenges and dilemmas of the decision maker. Cases are usually based on real situations. For reasons of privacy and confidentiality, the persons, the companies, and the locations involved are typically disguised.

When assigning case analyses, instructors expect that students will:

• Study the information provided in each case,
• Attempt to diagnose the nature of the problem or problems involved,
• Search for alternative ways in which the problems can be resolved,
• Recommend and justify the course of action that is most

likely to be effective. *The justification should rely, to a large extent, on theoretical principles.*

Sometimes students feel disappointed because the cases sometimes do not appear to be "dramatic." However, because the cases do represent the realities of organizations, they are often likely to be somewhat mundane, at least to the outside observer. Most of the incidents are based on events that were actually faced by managers and their subordinates on a day-today basis. Very often, cases do not contain all the information that the student would like to have. This is often done intentionally, or at least knowingly, by the case writer. In real life, a manager must frequently make decisions on the basis of limited information.

Sometimes students exert much energy searching for the "correct answer" or the "one best solution" without realizing that, in case studies, the stress is not on the "right" or "wrong" answer. Instead, the emphasis is on the student's ability to take into account all the variables that might have a bearing on the situation and then find an answer that is feasible and the best among a limited number of alternatives. Rarely are there situations for which there is only one solution.

Most real problems confronted by managers are multifaceted, involving such factors as motivation, culture, structure, technology, communication, and inter-personal concerns. In dealing with an organizational problem, a student has to be able to comprehend all its aspects, including the complex personal interrelationships involved.

The overall learning objectives of a case study can include the following:

- To improve a student's ability to think logically and imaginatively;
- To improve his or her ability to communicate;
- To provide an opportunity for experiential learning particularly when it involves group work;
- To develop analytical ability and personal involvement in problem solving;
- To reinforce theoretical learning in the course and provide the opportunity to evaluate critically previously learned theories;
- To bring about an awareness of the constraints in decision making; and
- To integrate the knowledge and skills gained studying the diverse areas within an administrative studies or business program.

A METHOD OF CASE ANALYSIS

There are many different methods that can be used to analyze successfully an organizational problem. Each requires a comprehensive understanding of the case information and its interrelatedness; a correct decision as to which principles, models, and theories of organizational behavior should be applied; and competent application of that selected area of knowledge to the problems or issues at hand.

Below is outlined one method of incorporating those criteria into a step-by-step procedure for case analysis. It is not the only feasible approach; but it is a method that will work, if applied carefully.

1. **Read the case study two or three times (more, for a long or complex case) in an undirected manner.**

"Undirected" means do not think about the questions asked or the method of analysis.
The goal here is to become familiar with the management situation that is described without filtering that perception with a premature focus on solutions or answers. If the assigned questions are considered prematurely, the case reader will unavoidably become solutions-oriented from the very first perusal. These solutions are likely to be both superficial and very hard to change as the study of the case proceeds.

2. **During the final reading, make notes regarding salient issues.**

These issues will not necessarily conform to those upon which the assigned questions are based (although there will most likely be a strong relationship which will eventually become clear).

3. **Now read and study the assigned question(s). Record information from the case that appears pertinent to its analysis.**

Do not, however, attempt to answer the questions yet. At this stage, focus on organizing your previous impressions of the case in terms of the assigned areas of inquiry. It will usually be necessary to return to the case for further information.

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4. **Decide which principles, theories, or models, if any, can be applied to the observed data in order to generate answers to the questions.**

The key is to match the theories, etc. to the case information and the assignment. The temptation that must be avoided is to generate solutions based mainly upon intuition, and then try to force-fit some handy theoretical rationale to the preconceived answers. Theoretical material is to be used in the analysis and solution of organizational problems, not as an afterthought.

5. **Apply the selected general principles, theories, or models and determine what solutions are suggested by this application. Select the ones that appear to best deal with the assigned questions.**

Often, more than one answer is supportable for a particular question. A search for additional theoretical rationale and an application of informed judgment should eventually resolve this difficulty. Part of the answer to the case study assignment may require that the rationale for the alternatives and solutions presented also be given. The major strength of any case report does not reside chiefly in the specific solutions offered, as these are always arguable. Rather, it is the **reasons** for the solutions that will either support or ultimately undermine the student's efforts. The reason will reflect correct or incorrect applications of management science and refined judgment.

WHEN SPECIFIC QUESTIONS ARE NOT ASSIGNED

Occasionally, case studies are assigned for analysis without specific questions. The student must then devise a framework that will enable the analytical and/or synthetic treatment of strategic issues. One general approach is as follows.

1. **Follow steps one and two of the procedure given above.**

2. **Identify the salient problems** (no more than three or four can be treated in a typical five- to ten-page case report). The problems may also be divided into symptoms and root causes, thus providing an opportunity later to suggest measures that might be effective at either or both levels. Make notes linking the information in the case to an identified problem.

3. **Employ internal and external constraints and relevant values to establish criteria by which the proposed solutions to the identified problems may be judged.**

Wherever possible, ensure that these criteria are objective or quantitative in nature. Qualitative indicators of success tend to be ambiguous and subject to argument. Too short a list of criteria will result in an incomplete judgment of solutions. Too long a list may be unsatisfactory and unwieldy. Typically, about four to eight criteria will usually do the job for each salient problem. They must, however, be very carefully chosen to reflect the key areas that will mean success or failure to the firm.

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4. **Follow steps four and five above to identify and apply theoretical concepts.** A list of alternative solutions should emerge from this stage.

5. **The final selection of a solution from alternatives is based upon how well it meets the criteria you have established.**

Any solution to a strategic problem will be, at best, an optimal approach that satisfies the criteria reasonably well. Sometimes, all that can be found is the lesser among evils. Rarely, indeed, is any solution a perfect one, meeting or exceeding all criteria. Moderate your enthusiasm for your selected solution with a realistic assessment of its merits and drawbacks.

6. **Present the chosen solution(s) in detail and realistically.**

Section titles for a case report following this format might then be: "statement of the problem"; "selection of criteria"; "selection and evaluation of solution alternatives"; and "conclusion" (presentation, rationale, and detailed assessment of the chosen solution).

7. **Choose an appropriate format for your case study.**

The use of headings, subheadings, and reasonably sized paragraphs that develop the themes of your work enable the reader of your case study to comprehend your analysis more easily. These structures help the reader to adapt to your way of thinking. The use of point form has its place, particularly when listing items.

However, make your points into full sentences. Short, fragmented points will not mean nearly as much to the reader of your work as they do to you. When you are discussing, analyzing or drawing conclusions, paragraph form is nearly always a more effective way to communicate your thoughts. Do not forget the value of images. A graph or a table can be very effective to present data that would be difficult to explain in words alone.

FOUR COMMON PITFALLS TO AVOID

Salience of Data and Issues

Most comprehensive cases (and real world situations) contain much information of little real importance to the main problems or issues that must be dealt with. Many problems or issues may themselves be spin-offs of deeper, more important root causes; or perhaps they are incidental and of little consequence to the major concerns. One of the tasks of the case study analyst is to "separate the wheat from the chaff," or identify and focus upon the truly essential elements of the problem at hand. To do otherwise is to become side tracked by issues of little gravity,

and therefore to neglect, in direct proportion, the real goal of the exercise. Often students are asked to take the role of employees, management, upper level executive, or of a consultant to those groups. This viewpoint should form the filter by which the case material is perceived. A careful balance must be struck between the rigorous case report and the scattering and weakening effects of being diverted by too many minor matters.

The Superficial Solution

These may arise due to an inadequate analysis and/or the use of too little case information; the failure to establish comprehensive, rather than vague criteria; or some other way in which the case report was not pushed far enough in important directions. For example, suppose the case refers to an ineffective work group, and the assignment is to make corrective recommendations. If the case report states, "The managers must improve their leadership skills," that is probably a superficial recommendation. Detailed descriptions of precisely what changes are required and why, and perhaps also how to carry out these improvements would constitute a much better answer.

Strive to be specific and to include as much detail as possible relevant to the major issues, analyses of those issues, and solutions. The test of a superficial statement is to ask, first, does it apply equally well to many firms or specifically relate to the one at hand; and second, would it constitute only vague hints to management, or would it give specific directions that management could follow.

The "More Information" Syndrome

It is often a temptation in a case report to "reluctantly" conclude that the data is woefully incomplete, and thus a firm conclusion is impossible. It would be necessary, as the next line usually reads, to obtain more information before reaching any definite

Conclusion In the real world, sometimes this is precisely what happens. In a case study, it is almost always tantamount to ducking the issue. The educational goal of a case study is usually to depict a situation for the purpose of analysis and recommendations; and that cannot be accomplished if the information is said to be incomplete and you stop at that point.

You will, of course, never receive that additional information; and the exercise's goal is frustrated. It is important to complete the case report with the information at hand. If there is legitimate cause to seriously question the quantity or quality of the information provided, then this can be noted as qualifying the competence of the solution. A complete answer should still be attempted.

Finally, Answer the Question!

Just as the organizational decision-maker must ultimately reach some conclusion, so the preparer of a case report must avoid "waffling" or sitting on the fence when a specific recommendation is requested. Many times it may seem difficult to decide between two or more alternatives. The wisest course is to make the best choice possible and then note that other alternatives may be almost equally attractive. In your struggle to analyze a complex management situation, do not ever lose sight of the question that was asked. When you complete your work, reread the question and ask yourself, "did I answer the question as completely as possible?"

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