



Student Instructions for Preparing Case Studies

Brief Overview

In place of an Abstract, include a brief overview of the situation with the company/enterprise involved in the case study. Assume that I have read the case study, and you are just refreshing my memory.

Strategic Issues

It is essential that, early on in the paper, a sharply focused diagnosis of **strategic issues, key problems, and key issues** (these can be subsections) is provided that demonstrates a good grasp of the company's present situation. Make sure that you can identify the firm's strategy and can pinpoint whatever strategy implementation issues that may exist. Consult your texts, handouts, and any other analytical guides that may be of help. State problems and other factors as clearly and succinctly as you can.

Analysis and Evaluation

This is usually the hardest part of the report. Analysis is hard work! Check out the firm's financial ratios, its profit margins, and rates of return, and its capital structure, and decide how strong the firm is financially. Use the book or other financial texts to assist in this effort. Similarly, look at marketing, production, managerial competence, and other factors underlying the organization's strategic



success and failures. Decide whether the firm has valuable resource strengths and competencies, and if so, whether it is capitalizing on a strategic advantage.

Check to see if the firm's strategy is producing satisfactory results, and determine the reason why or why not. Probe the nature and strength of competitive forces confronting the enterprise. Decide whether and why the firm's competitive position is getting stronger or weaker.

You are obliged to offer analysis and evidence to back up your conclusions. Do not rely on unsupported opinions, overgeneralizations, and platitudes as substitutes for tight, logical argument backed up with facts and figures.

Demonstrate that you have command of the strategic concepts and analytical tools to which you have been exposed. Do not be afraid to use quantitative calculations, tables, charts, and graphs correctly cited in APA style. Include an in-text citation to the table or figure in the body of the report to the full table and figure reference at its end.

Your interpretation of evidence should be reasonable and objective. Be wary of preparing a one-sided argument that omits all aspects not favorable to your conclusions. Likewise, try not to exaggerate or over-dramatize. Endeavor to inject balance to your analysis and to avoid emotional rhetoric. Never use "I think," "I feel," and "I believe." ***Do not use first person in formal academic writing.*** The past tense and the active voice is preferred in academic writing.



Recommendations

The final section of the written case analysis should consist of a set of definite **recommendations** and a **plan of action**. Your set of recommendations should address all of the problems/issues you have identified and analyzed. If the recommendations come as a surprise or do not follow logically from the analysis, the effect greatly weakens your suggestions of what to do. Obviously, your recommendations for actions should offer a reasonable prospect of success. High-risk, bet-the-company recommendations should be made with caution. State how your recommendations will solve the problems you identified. Be sure the company is financially able to carry out what you recommend; also check to see if your recommendations are workable in terms of acceptance by the persons involved, the organization's competence to implement them, and prevailing market and environmental constraints. Try not to hedge or weasel on the actions that should be taken.

By all means state your recommendations in sufficient detail to be meaningful—get down to some definite nitty-gritty specifics. Avoid such unhelpful statements as "The organization should do more planning," or "The company should be more aggressive in marketing their product." For instance, do not simply say, "The firm should improve its market position," but state exactly how you think this should be done.

The key is to offer a definite agenda for action, stipulating a timetable and sequences for initiating actions, indicating priorities, and suggesting who should be responsible for doing what. Use the following as a guide:



1. List your specific recommendations for the firm in detail. Explain why each recommendation was made, including the information used and the logic (or analysis) applied to reach your conclusion. As you prepare your analysis, remember that no decision is complete until the financial impact of the decision is determined.
2. If your recommendation(s) need to be taken in a particular sequence, be sure to indicate the proper sequence and the reasons for the sequence.
3. Discuss the events or uncertainties that are most likely to cause trouble in the implementation of your recommendation(s), and how you would react to them if they were to occur.

In proposing an action plan, remember there is a great deal of difference between, on the one hand, being responsible for a decision that would be costly if it was proved to be in error and, on the other hand, casually suggesting courses of action that might be taken when you do not have to bear responsibility for any of the consequences. A good rule to follow in making your recommendation is: ***Avoid recommending anything you would not yourself be willing to do if you were in management's shoes.*** The importance of learning to develop good managerial judgment is indicated by the fact that, even though the same information and operating data may be available to every manager or executive in an organization, the quality of the judgments about what the information means, and which actions need to be taken does vary from person to person.



It goes without saying that your report should be well organized and well written. Great ideas amount to little unless others can be convinced of their merit—*this takes tight logic, the presentation of convincing evidence, and persuasively written assignment.*



References

Place your references in APA style on a separate page, on the last page of the paper, double-line spaced and listed alphabetically by the author's last name. Indent the second and subsequent lines of each reference by half an inch. This is an important element of your study. It demonstrates your scholarship and research. Your resources should support your analysis, recommendations, and provide theoretical support for your arguments.