# Business Case Study Analysis - Basic Format

A *case study analysis* is not merely a descriptive but, as the term itself suggests, a critical exercise, typically an examination of a situation or institution with view towards making recommendations. Case study analyses are included in many courses to give students a sense of the constraints involved in decision making. Cases are usually based on real situations, although for the sake of confidentiality the names of persons and institutions may be disguised.

**Analysis Method**

Many methods can be used to analyze case studies. The outline below, although it provides a step-by-step procedure that can be applied in many situations, is not the only feasible approach. Always consult your instructor for the particular requirements of a given assignment.

1. Read the case study attentively at least two or three times. Become familiar with the key points of the situation without adopting a *position* on the case. Read as carefully and objectively as you can.
2. After becoming thoroughly familiar with the case, make notes regarding the main issues *as you see them*. Typically, the instructor will provide prompts or questions to help you focus on these.
3. Consider the question(s) assigned by your instructor. Record all information pertinent to these in the form of case notes.
4. Decide which principles, theories, or models (usually part of the assignment) best apply to the observed facts of the case to prepare your answers. Remember that your analysis is likely to be founded on a specific theory, and avoid solutions based mainly upon personal intuition.
5. Develop your solution in consideration of the principles, theories, or models that you have selected. The assigned questions may require you to consider alternative solutions. Remember the importance of showing not merely your judgement but the basis for it.

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 (above).
2. Identify the key problems and their root causes.
3. Develop solutions to the identified problems. Wherever possible, specify objective or quantitative criteria to assess the solutions (qualitative indicators of success may be too subjective).

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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. In most cases you will select an optimal approach and provide a realistic assessment of your solution's strengths and weaknesses.
6. Present the chosen solution(s) in detail.
7. Use an appropriate format for your case study analysis. Use suitable headings and subheadings. Do not forget the value of graphics; a chart or table can present information more effectively than unsupported text.

**Tricks and Traps**

Most comprehensive case studies contain some information that is of marginal importance to the main issues—or at least, to the issues you are directed to examine. Remember to consider the implications of your theoretical framework(s): unacknowledged assumptions can limit your thinking and your critique of alternative solutions. When you begin to prepare your "recommendations" section, stop and review the assignment yet again; many case study analyses fail to address the issues identified by the instructor.

**Sample Format**

1. Abstract/Executive Summary: single paragraph summary including recommendations
2. Problem Statement: Overview of key issues arising from case analysis
3. Case Analysis: Theory-driven analysis of case(s) identifying factors underlying key issues
4. Alternative Solutions: Pros and cons of possible solutions to problems
5. Recommendations: Detailed description of optimal solution with rationale

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