



How to Analyze a Case Study

Adapted from Ellet, W. (2007). *The case study handbook*. Boston, MA: Harvard Business School.

A **business case** simulates a real situation and has three characteristics: 1. a significant issue, 2. enough information to reach a reasonable conclusion, 3. no stated conclusion.

A case may include

1. irrelevant information
2. unstated information that the reader must infer
3. a nonlinear structure in which related evidence is scattered throughout the text

How to Analyze a Case Study

1. Determine what type of case study you're reading. Types of case situations generally are:
 - problems – a situation in which something important happened but we don't know why
 - decisions – an explicit decision that must be made (look for options, criteria, relevant evidence)
 - evaluations – a judgment about the worth, value, or effectiveness of a performance, act, outcome
 - rules – quantitative methods to analyze an area of business
2. From the protagonist's point of view, develop a hypothesis (tentative explanation that accounts for the facts and can be tested) to resolve the protagonist's dilemma.
 - What do I need to know about the situation?
 - If it's a problem, what are the aspects, what's the significance, who is responsible, etc.?
 - If it's a decision, what are the options, what's at stake, what are the criteria, etc.?
 - If it's an evaluation, who or what is being evaluated, who's responsible, what's at stake, what are the most important criteria, etc.?
 - What's my hypothesis?
 - What evidence do I have to support my hypothesis? What additional evidence do I need?
 - What is the weakness of my hypothesis? What is the best alternative?

How to Write a Case Analysis

Generally, organize your essay around

1. A **definition or position statement** (your conclusion) – answers the question what?
2. An **argument** (your evidence – quantitative and/or qualitative) – answers why?
3. A **chronological action plan** (steps to solve a problem, implement a decision, improve performance, etc.) – answers how?

Organization of problem essays:

1. problem definition
2. diagnosis (summarize the principal causes of the problem)
3. proof of causes (show why the diagnosis is valid – causal links)
4. action plan:
 - goals based on the argument
 - specific steps
 - realistic short- and longterm steps
 - responds to major risk of plan

Organization of decision essays:

1. recommended decision (position statement)
2. decision options (alternatives to your decision)
3. decision criteria (explicit and relevant)
4. proof of recommended options (apply criteria to each option to show how good the fit is between your option and the information in the case)
5. critique of options (prove that the other options are less desirable)
6. action plan:
 - goals based on the argument
 - specific steps
 - realistic short- and longterm steps
 - responds to major risk of plan

Organization of evaluation essays:

1. bottom-line evaluation (position statement)
2. evaluation criteria
3. proof of the evaluation (organize proof by criteria (e.g., economic, political, social factors, and their advantages/disadvantages, strengths/weaknesses)
4. qualifications (factors not part of the evaluation that impact it)
5. action plan:
 - goals based on the argument
 - specific steps
 - realistic short- and longterm steps
 - responds to major risk of plan

Tips for a successful case analysis:

- Your reader does not want a transcript of your thinking or a lengthy summary of the case.
- Your reader wants the product of your thinking.
- To convince the reader that a conclusion about a case is valid,
 - offer credible evidence linked directly to the conclusion
 - give advantages and acknowledge disadvantages
 - show that you have considered alternatives