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## A STRUCTURED APPROACH TO CASE ANALYSIS AND REPORTING

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### ABSTRACT

Although the case method of instruction is popular in the business school, one frequently finds students entering case courses without experience in case analysis. In the case method primary importance is placed upon the development of skills in decision-making; whereas in the normal classroom lecture the focus is on acquisition of knowledge. This difference in emphasis requires a significant adjustment for the introductory student. They quickly find that the instructor will not provide the right answers, but rather attempts to guide them through a variety of decision-making experiences so that they develop their own skills. The amount of guidance, and structure, that the instructor provides in a case course can have an important effect on student performance and attitudes. The problem of this introductory adjustment and the guidance that should be given to students are the subjects of discussion in this paper.

### INTRODUCTION

Case analysis and reporting is more an art than a science; there are no "cookbook" rules that lead to brilliant analyses and presentations for each case. However, it is possible for instructors to give students aids--guidelines, checklists, and examples--which describe the "science" aspect of case analysis. Then, as students gain experience in case analysis, they will identify further guidelines, checklist items, and examples to add to the tips given by their instructor to lead to more effective and efficient analyses.

A checklist is an enumeration of key points about a topic. Each point can be explained by a brief comment and, often, an example (e.g., a checklist on "How to Participate in Class Discussions" might include: Prepare Before Class, Push Your Ideas, Listen to Others, Recognize Flow of Discussion, etc.). A checklist covers a topic area that might take a short book to treat fully. Thus, the topic of each checklist cannot be discussed completely; however, we believe that a checklist can provide worthwhile advice for students on the conduct of tasks. This is accomplished by designing checklist items that serve one of the following functions.

1. The Outstanding "Do's": Most tasks have elements that one strives to execute. For example, during the in-class discussion, one tries to word contributions to be brief and to the point. Concentrating attention on the "Do" elements of a task improves its overall execution.

2. The Common Errors: In a similar fashion, drawing attention to the common errors made in a task improves the performance of anyone who happens to make that error. For example, in the checklist on writing style, "Don't Overuse the Passive Voice" is one of the "Don'ts".

3. Reminders about Theory: In applying an extensive theory to a problem (e.g., marketing to a case situation), one must be sure to relate all one's knowledge to the problem. The systematic review afforded by the checklist ensures that no important areas of theory are inadvertently ignored.

### HOW TO ANALYZE CASES

Case analysis is the intellectual process of formulating recommendations for management actions to further the interests of certain persons or organizations in the situation described in a case; thus, it is an example of decision-making. Case analysis gives students practice in bringing experience, theory, quantitative tools, outside research, and ingenuity to bear on the formulation of action plans in real (or realistic) situations. Although case teaching has many benefits for students, the use of cases as a vehicle to give students practice in diagnosing an organization's situation and formulating action plans is its most important function.

Student activities in learning by the case method are so different from those in learning by the lecture method, that students take some time to adjust to the new demands. Traditional teaching requires the student to learn theory and facts and to apply them to problems that are given. Cases can require that the student determine the problem, select the appropriate tools, and formulate a plan of action, all in the absence of complete information. Further, there may be no best action plan--unique optimal solutions cannot necessarily be identified by the instructor or by the class. These complications, all typical of job experiences soon to confront the student, embody the challenges and opportunities of case analysis.

Some of the topic areas where introductory students need guidance as it relates to case analysis include: development of a framework to organize the analysis, a review of the quantitative and financial ("hard") tools useful for case analysis and the marketing and behavioral concepts ("soft tools") that are often relevant for case analysis. Checklists are valuable learning aids to each of these areas. For example, a framework to analyze cases includes: (1) comprehend case situation, (2) diagnose problem areas, (3) state problem, (4) generate alternatives, (5) evaluate alternatives and select best, and (6) defend implement. Details of this framework and others may be found in "The Guide to Case Analysis and Reporting."

### HOW TO WRITE CASE REPORTS

Case reporting gives students valuable training in communicating and selling the results of their analysis and solutions of problems in management and administration. These abilities in formal written and oral communication are vital to successful management careers.

Students, in theory, enter case courses with the background and skills to write and present case reports. They supposedly have analytic, writing and speaking abilities sufficient to produce high quality case reports. However, most every instructor is disappointed to see how poorly beginning students put these skills together. Students need specific direction in communicating

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case analysis.

This communication involves: (1) selecting material appropriate for the presentation; (2) organizing the material for presentation; and (3) using the media (written words or oral speaking) to convey the message depend upon the setting of the presentation. Such factors as the objectives of the report, the time constraints, the familiarity of the audience with the subject, and the analytic background of the audience are important considerations in selecting and organizing material. All these areas can be conveniently summarized by checklists.

### HOW TO PRESENT ORAL CASE REPORTS

One skill above all others rapidly earns a reputation for unusual competence. It is the ability to stand on one's feet and deliver clear, forceful, interesting speeches. Anyone who aspires to management positions will be frequently called upon to deliver extemporaneous and prepared remarks to audiences of all sizes. The oral case report affords students an excellent opportunity to develop their abilities in public speaking.

As examples of the problems beginning students find with case reporting, consider the following. The selection and organization of material for an oral case report is not the same as for a written case report. The written report is a detailed, logical development of arguments. The oral presentation must hold the interest and attention of the audience before anything is accomplished; thus, oral reports cannot use intricate arguments or examples with many details. Audiences are easily bored by arguments and examples they cannot follow. The most important rule in preparing an oral presentation is: include only material that is essential to the main argument and present it in a simple, straightforward fashion. This means that some illustrations, clarifications, and contents that would be included in a written report are left out of an oral presentation. In written reports one can refer to earlier points; no such opportunity is available during speeches.

There are other areas of presentations where the structure afforded by checklists are a valuable aid for students. These include: how to organize the presentation, tips on public speaking, and examples of oral presentations.

### SUMMARY

This paper argues that introductory students entering the typical case course need substantial guidance and direction in case analysis and reporting. This guidance, or structure, can be provided through the development of guidelines, checklists and examples covering such topics as how to analyze a case, how to write a case report, and how to make an oral presentation. The essence of the case method is to teach students how to act intelligently, creatively, and morally in realistic situations. Students need more than exposure to theory (lectures and readings) and exposure to situations (cases). They also need guidelines telling them how to turn the theory into action.