

**SE 305**  
**SOFT SKILLS**  
**CASE STUDY**

**Introduction**

The **case study** method of teaching used in management education is quite different from most of the methods of teaching used at the school and undergraduate course levels. Unlike traditional lecture-based teaching where student participation in the classroom is minimal, the case method is an active learning method, which requires participation and involvement from the student in the classroom. For students who have been exposed only to the traditional teaching methods, this calls for a major change in their approach to learning.

This booklet is intended to provide students with some basic information about the case method, and guidelines about what they must do to gain the maximum benefit from the method. We begin by taking a brief look at what case studies are, and how they are used in the classroom. Then we discuss what the student needs to do to prepare for a class, and what she can expect during the case discussion. We also explain how student performance is evaluated in a case study based course. Finally, we describe the benefits a student of management can expect to gain through the use of the case method.

**What is a Case Study?**

There is no universally accepted definition for a case study, and the case method means different things to different people. Consequently, all case studies are not structured similarly, and variations abound in terms of style, structure and approach. Case material ranges from small caselets (a few paragraphs to one-two pages) to short cases (four to six pages). A case is usually a "description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person or persons in an organization."<sup>1</sup> In learning with case studies, the student must deal with the situation described in the case, in the role of the manager or decision maker facing the situation.

An important point to be emphasized here is that a case is not a problem. A problem usually has a unique, correct solution. On the other hand, a decision-maker faced with the situation described in a case can choose between several alternative courses of action, and each of these alternatives may plausibly be supported by logical argument. To put it simply, there is no unique, correct answer in the case study method.

The **case study** method usually involves three stages: individual preparation, small group discussion, and large group or class discussion. While both the instructor and the student start with the same information, their roles are clearly different in each of these stages, as shown in Table 1.

**Table 1**

**Teacher and Student Roles in a Regular Case Class**

<b>When</b>	<b>Teacher</b>	<b>Student or Participant</b>
<b>Before Class</b>	Assigns case and often readings	Receives case and assignment
	Prepares for class	Prepares individually
	May consult colleagues	Discusses case in small group
<b>During Class</b>	Deals with readings	Raises questions regarding readings
	Leads case discussion	Participates in discussion
<b>After Class</b>	Evaluates and records student participation	Compares personal analysis with colleagues' analysis.
	Evaluates materials and updates teaching note	Reviews class discussion for major concepts learned.

*Source: Michiel R. Leeenders, Louise A. Mauffette-Launders and James Erskine, Writing Cases, (Ivey Publishing 4<sup>th</sup> edition) 3.*

### **Case Studies in the Classroom**

Case studies are usually discussed in class, in a large group. However, sometimes, instructors may require individuals or groups of students to provide a written analysis of a case study, or make an oral presentation on the case study in the classroom.

### **Preparing for a Case Discussion**

Unlike lecture-based teaching, the case method requires intensive preparation by the students, before each class. If a case has been assigned for discussion in the class, the student must prepare carefully and thoroughly for the case discussion.

The first step in this preparation is to read the case thoroughly. To grasp the situation described in a case study, the student will need to read it several times. The first reading of the case can be a light one, to get a broad idea of the story. The subsequent readings must be more focused, to help the student become familiar with the facts of the case, and the issues that are important in the situation being described in the case – the who, what, where, why and how of the case.

However, familiarity with the facts described in the case is not enough. The student must also acquire a thorough understanding of the case situation, through a detailed analysis of the case. During the case analysis process, she must to attempt to identify the main protagonists in the **case study**(organizations, groups, or individuals described in the case) and their relationships.

The student must also keep in mind that different kinds of information are presented in the **case study** There are facts, which are verifiable from several sources. There are inferences, which represent an individual's judgment in a given situation. There is speculation, which is information which cannot be verified. There are also assumptions, which cannot be verified, and

are generated during case analysis or discussion. Clearly, all these different types of information are not equally valuable for managerial decision-making. Usually, the greater your reliance on facts (rather than speculation or assumptions), the better the logic and persuasiveness of your arguments and the quality of your decisions.

Broadly speaking, the different stages in the case analysis process could be as follows<sup>3</sup> :

1. Gaining familiarity with the case situation (critical case facts, persons, activities, contexts)
2. Recognizing the symptoms (what are the things that are not as expected, or as they should be?)
3. Identifying goals/objectives
4. Conducting the analysis
5. Making the diagnosis (identifying problems, i.e., discrepancies between goals and performance, prioritizing problems etc.)
6. Preparing the action plan (identifying feasible action alternatives, selecting a course of action, implementation planning, plan for monitoring implementation)

The components of a situation analysis for a typical marketing case are given in Exhibit 1. This consists of situation analyses at the corporate and product levels and a summary of the results of the analysis. Cases in other functional areas such as strategy can also be analyzed using similar frameworks. As mentioned earlier, the situation analysis should be followed by problem diagnosis and action plan recommendations.

## **Exhibit 1**

### **Components of a Situation Analysis**

#### **1. Corporate level situation analysis**

- Corporate mission and objectives
- Resources and competencies
- Environmental problems and opportunities
- Demographic
- Social-cultural
- Economic
- Technological
- Legal and regulatory
- Competition
- Portfolio analysis

#### **2. Product level situation analysis**

- Market analysis
- Describe the product-market structure
- Find out who buys

- Assess why buyers buy
- Determine how buyers make choices
- Determine bases for market segmentation
- Identify potential target markets
- Competitive analysis
- Identify direct competitors
- Assess likelihood of new competitors
- Determine stage in product life cycle
- Assess pioneer advantages
- Assess intensity of competition
- Determine the competitors' advantages and disadvantages
- Market measurement
- Estimate market potential
- Determine relative potential of each geographic area
- Track industry sales trends
- Assess company or brand trends in sales and market share
- Make forecasts
- Profitability and productivity analysis
- Determine the cost structure
- Identify cost-volume-profit relationships
- Perform break-even and target profit analysis
- Make projections of sales or market share impact of marketing expenditures

### **3. Summary**

- Assess performance (identification of symptoms)
- Define problems and opportunities

While preparing for the case discussion, the student can also make notes with respect to the key aspects of the situation and the case analysis. These could include points such as the following:

- Which company (or companies) is being talked about? Which industry is referred to?
- What are the products/services mentioned?
- How/Why did the company land in problems (or become successful)?
- What decision issues/problems/challenges are the decision makers in the case faced with?

### **Case Discussions in the Classroom**

A classroom case discussion is usually guided by the instructor. Students are expected to participate in the discussion and present their views. In some cases, the instructor may adopt a particular view, and challenge the students to respond. During the discussion, while a student

presents his point of view, others may question or challenge him. Case instructors usually encourage innovative ways of looking at and analyzing problems, and arriving at possible alternatives.

The interaction among students, and between the students and the instructor, must take place in a constructive and positive manner. Such interactions help to improve the analytical, communication, and interpersonal skills of the students.

Students must be careful that the contributions they make to the discussion are relevant, and based on a sound analysis of the information presented in the case. Students can also refer to the notes they have prepared during the course of their preparation for the case discussion.

The instructor may ask questions to the class at random about the case study itself or about the views put forward by an individual student. If a student has some new insights about the issues at hand, she is usually encouraged to share them with the class.

Students must respond when the instructor asks some pertinent questions. The importance of preparing beforehand cannot be emphasized enough – a student will be able to participate meaningfully in the case discussion only if he is knowledgeable about the facts of the case, and has done a systematic case analysis. A case discussion may end with the instructor (or a student) summarizing the key learning points (or 'takeaways') of the session.

Student performance in case discussions is usually evaluated, and is a significant factor in assessing overall performance in the course. The extent of participation is never the sole criterion in the evaluation – the quality of the participation is an equally (or more) important criterion.

### **Working in a Group**

If a group of students is asked to analyze a case, they must ensure that they meet to discuss and analyze the case, by getting together for a group meeting at a suitable time and location. Before the meeting, all the team members must read the case and come with their own set of remarks/observations.

The group must ensure that all the group members contribute to the preparation and discussion. It is important that the group is able to work as a cohesive team – problems between team members are likely to have an adverse impact on the group's overall performance.

### **Preparing a Written Case Analysis**

Quite often, a written analysis of the case may be a part of the internal evaluation process. When a written analysis of a case is required, the student must ensure that the analysis is properly structured.

An instructor may provide specific guidelines about how the analysis is to be structured. However, when submitting an analysis, the student must ensure that it is neat and free from any factual, language and grammar errors. In fact, this is a requirement for any report that a student may submit – not just a case analysis.

## **Making a Case Presentation**

The instructor may ask a group of students to present their analysis and recommendations to the class. Alternatively, an individual student can also be asked to make a presentation.

The key to a good presentation is good preparation. If the case has been studied and analyzed thoroughly, the content of the presentation should present no problems.

However, a presentation is more than the content. Some of points that need to be kept in mind when making a case presentation are:

- As far as possible, divide the content uniformly so that each team member gets an opportunity to speak.
- Use visual aids such as OHP slides, Power Point presentations, advertisement/press clippings etc., as much as possible.
- Be brief and to-the-point. Stick to the time limits set by the instructor.
- Be well prepared.

## **Evaluating Student Performance**

The evaluation of a student's performance in a case-driven course can be based on some or all of the following factors:

- Written case analyses (logical flow and structuring of the content, language and presentation, quality of analysis and recommendations, etc.).
- Case presentations (communication skills, logical flow and structuring of the content, quality of analysis and recommendations, etc.).
- Participation in classroom case discussions (quality and extent of participation).
- Case writing assignments or similar projects.
- Case-based examinations.

## **Benefits from the Case Method**

The case benefit has several advantages over traditional teaching methods. The skills that students develop by being exposed to this method are listed in Exhibit 2. The consequences to the student from involvement in the method are listed in Exhibit 3.

At the first stage you have to pass through the four stages

- Study
- Contemplate
- Decide and
- Implement

The most difficult part of solving the case study is to understand the case where majority of student fails. So as to overcome from this, above four stages can be beneficial.

Presently, an average Indian student does not have specific procedure to solve the case study nor their lecturer teaches. This procedure has different logical steps. A comprehensive list of steps to attain the best possible solution for the case is as follows.

I attached a case for insight.

**Case:**

“John is a sales person in an insurance company, yesterday at 6:30 pm he gets an urgent appointment from his client for what he was waiting for 20 days, this deal may increase his sales volume, he has to meet him tomorrow by 10:30 to 11:00 am at his office in Mumbai, presently, John is in Delhi.”

With the help of case mention above we can better understand all the steps.

**1. Problem Identification:**

This should describe what is required to be achieved through the proposed solution. As per the above case the problem with John is to go to Mumbai by tomorrow morning itself. He has very short time to go to Mumbai.

**2. Define Boundaries:**

In this stage specify the limits and boundaries under which case has to be solved. These may be given in the case clearly or you need to assume it. (Some information has to be consider while solving the case.) As per our case John has to arrive at Mumbai before 11:00 otherwise he may miss the opportunity.

**3. Case:**

This heading should contain the key words given/narrated in the case. This is very important step but often student rewrite the whole case in this heading. But it gives bad impression to reader of case.

**4. Assumption:**

The gaps in the data noticed while writing the keywords have to be filled in by making assumptions. These assumptions should be clearly stated and reason for making the assumption should be stated.

**5. Possible solution for case:**

Under this heading as much as solution you can give that should write under sub heading.  
Ex.

1. Solution:  
Advantages:  
Disadvantages:

2. Solution:  
Advantages:

Disadvantages:

3. Solution:  
Advantages:  
Disadvantages:

**6. Select best possible solution:**

This paragraph should give the answer why this solution is best solution for the case and how it can be helpful for case, what competency it has. It may be single solution or mixture of more than one solution.

**7. Managerial Application:**

Under this heading student should write which managerial theory used to get the solution.

**8. Conclusion:**

A summary by comparing what was the problem, how the action plan on the basis of optimal solution.

Here student should sum up the case which describe the problem and how the implementations plan of the best solution tackles it optimally.



**Exhibit 2**  
**Inventory of Skills Developed by the Case Method**

1. Qualitative and quantitative analytical skills, including problem identification skills, data handling skills and critical thinking skills.
2. Decision making skills, including generating different alternatives, selecting decision criteria, evaluating alternatives, choosing the best one, and formulating congruent action and implementation plans.
3. Application skills, using various tools, techniques and theories.
4. Oral communication skills, including speaking, listening and debating skills.
5. Time management skills, dealing with individual preparation, small group discussion and class discussion.
6. Interpersonal or social skills, dealing with peers, solving conflicts and practicing the art of compromise, in small or large groups.
7. Creative skills, looking for and finding solutions geared to the unique circumstances of each case.
8. Written communications skills, involving regular and effective note-taking, case reports and case exams.

Source: Michiel R. Leenders, Louise A. Mauffette-Launders and James Erskine, *Writing Cases* (Ivey Publishing, 4th edition) 7. Some of the advantages of using case studies are given below:

- Cases allow students to learn by doing. They allow students to step into the shoes of decision-makers in real organizations, and deal with the issues managers face, with no risk to themselves or the organization involved.
- Cases improve the students ability to ask the right questions, in a given problem situation. Their ability to identify and understand the underlying problems rather than the symptoms of the problems is also enhanced.
- Case studies expose students to a wide range of industries, organizations, functions and responsibility levels. This provides students the flexibility and confidence to deal with a variety of tasks and responsibilities in their careers. It also helps students to make more informed decisions about their career choices.

**Exhibit 3**  
**Consequences of Student Involvement with  
the Case Method**

1. Case analysis requires students to practice important managerial skills- diagnosis, making decisions, observing, listening, and persuading – while preparing for a case discussion.
2. Cases require students to relate analysis and action, to develop realistic and concrete actions despite the complexity and partial knowledge characterizing the situation being studied.
3. Students must confront the intractability of reality- complete with absence of needed information, an imbalance between needs and available resources, and conflicts among competing objectives.
4. Students develop a general managerial point of view – where responsibility is sensitive to action in a diverse environmental context.

Source: 1993, C. C. Lundberg and C. Enz, 'A framework for student case preparation', Case Research Journal, 13 (Summer) 134/ Michael A. Hitt, R. Duane Ireland and Robert E. Hoskisson, Strategic Management (Thomson Southwestern, 6th Edition) Cii.

- Cases studies strengthen the student's grasp of management theory, by providing real-life examples of the underlying theoretical concepts. By providing rich, interesting information about real business situations, they breathe life into conceptual discussions.
- Cases provide students with an exposure to the actual working of business and other organizations in the real world.
- Case studies reflect the reality of managerial decision-making in the real world, in that students must make decisions based on insufficient information. Cases reflect the ambiguity and complexity that accompany most management issues.
- When working on a **case study** in a group, students must also be able to understand and deal with the different viewpoints and perspectives of the other members in their team. This serves to improve their communication and interpersonal skills.
- Case studies provide an integrated view of management. Managerial decision-making involves integration of theories and concepts learnt in different functional areas such as marketing and finance. The case method exposes students to this reality of management.