

Management117

CASE STUDY GUIDE

Louise A. Mauffette-Leenders, James Erskine and Michiel R. Leenders discussed case preparation in their book "Learning with Cases". The following guide borrows heavily from their work in an attempt to provide additional information on writing case studies. This guide is designed to assist you in capturing critical issues and developing a thoughtful recommendation for action. Your case study should present enough information for the reader to follow your thinking about an issue facing the organization.

Section One: Background

It is important to clearly restate key facts in a case. In large organizations, senior management may not be fully aware of critical issues developing at lower levels. Your job is to set the stage for the CEO. You will discuss key actors in the case (if this is a real case study, use titles not names), the agenda (what does the actor want to gain in this situation), the organization's structure (use models in the text to help you with this section), reporting relationships (use of charts helps in this section), and background information about the key players. You can organize this data in any format that you determine will assist the reader.

Section Two: Define the Issue

The first job in a case analysis is to produce a clear and comprehensive statement of the issue (s) involved in the case. For this assignment you are to pick only one ETHICAL issue and explain why you think it is most important. The concern, problem, decision, challenge, or opportunity you decide to analyze needs to be clearly identified. Use of your glossary of terms to frame the issue will be very helpful.

The old adage, "stating the right problem takes you more than half way toward the right solution" works in this instance. If you don't pose the right questions, you are unlikely to find the correct answers. Don't be too hasty in your analysis. What may appear to be a problem could be a symptom. Look for deeper hidden issues.

The problem statement can start out with a general observation - sales at xyz have dropped over the last six months. The second sentence should be the issue or opportunity you are going to address - A major contributor to sales reduction is high sales staff turnover.

Section Three: Analysis of Case Data:

Issues or opportunities you find in the case tend to have two parts, **immediate and basic**. Immediate issue refers to the specific ETHICAL decision, problem, challenge, or opportunity faced by the decision-maker in the case. For example, the decision focus may be on increased sales. To increase sales there are a number of options available to the organization. Sale increase is therefore an immediate issue. Basic issues are larger and more generic in nature. They relate to the concepts, theories and models discussed during the course. For example, the organization may be focusing on INCREASED SALES as the only means of creating a high performance work environment. What maybe the deeper (basic issue) is the worth of the product to society as a whole.

For the purpose of this case study you are to focus on the immediate, while providing a short discussion of the basic issue(s). There are two judgements that help you select your immediate issue. The first is **Importance**. Could it make or break the organization? Could it be a source of major competitive advantage? Could it have a major effect on morale in the organization? The second is **Urgency**. Issues of this nature would be meeting the emergency room requirement in a hospital. For the organization to remain viable everything must be dropped to address this issue. If the problem, issue, decision, or opportunity you have selected does not meet these two criteria, keep looking.

Once you have defined the issues, it is important to determine **cause and effect** relationships of variables creating the problem. It is important that you think about events as well as relationships between people. You can usually see a cause and effect relationship by looking at one or more of five categories of causes: Equipment, People, Methods, Materials, Other. Is the source of the ethical problem the equipment used, the values of the people involved, the methods (procedures, policies, practices of the organization), the actual material used in the product or some other contributing factor.

You can approach your analysis using quantitative or qualitative assessment techniques. It is necessary to briefly explain why you selected your analytical approach.

Section Four: Alternatives

The goal of this section is to present ways of removing the cause(s) of the ethical problem(s) in the case. This is a section where you can stretch your creativity. Remember that your analysis will be graded on your **ability to link** your alternatives to a theory, concept, or model presented in the text or during

lectures. The inclusion of doing nothing should be part of your analysis. Doing nothing helps frame your options and causes by forcing you to think about the effects of your alternatives.

Section Five: Recommendation

Now is the time to sell your thinking. You can support your recommendation with quantitative arguments: increased profit, decreased cost, higher return on investment, greater market share, increased capacity, shorter delivery times, lower risks, greater cash flow, high rate of inventory turn over, increased productivity, lower staff turn over, short time to complete projects, greater rates of growth, and increased quantities. Another approach would be qualitative support: greater competitive advantage, increased customer satisfaction, increased employee morale, improved corporate image, acceptance of change, increased synergy, improved ethics, greater flexibility, increased safety, improved visual appeal, decreased obsolescence, heighten cultural sensitivity, motivation, and goodwill. Remember to support your position utilizing **the borrowed authority provided in your readings.**

Remember: **Link all significant aspects of sections 2,3,4, and 5 to course material (Borrowed Authority of S.D/A.F) In addition Edit, Edit, and Edit.**

Mauffette- Leenders, Erskine, James A. and Leenders, Michiel. (1997) Learning with cases. London, Ontario: Richard Ivey School of Business. University of Western Ontario.

