Writing a Case Study

Timothy M. Smith

Marketing 4030: Sales Management

Two written Case Summaries based on case analysis are required. Although students are encouraged to work in teams to analyze the case, each student is expected to turn in an original analysis. Students who fail to turn in any assignment before the beginning of class on the due date will lose a full grade (C instead of a B, etc.). The text of the written case study must fit on two 8 1/2” x 11” pages with 1” margins all around. The font should be no smaller than 10 font. Paragraphs may be single spaced with double-spacing between paragraphs. Text beyond the first two pages will not be read. Unlimited appendices may be used as supporting material, but they must be: (1) referenced in the text of the summary, and (2) kept in order of their reference in the text. Be careful that the point you make in the text by using an appendix is clear and that, in combination, the appendices are logically consistent.

Case Studies should follow the following format:

Introduction/Statement of Purpose

This section should provide a statement as to the purpose of your analysis. Given that you have limited space, eliminate the text about "how you have been hired to do a study" and quickly get to the point of what your analysis found and what the implications are for the firm should they fail to consider the recommendations you have outlined. The key to writing a good statement of purpose is to identify the situation confronting the firm (threat to profitability, market share, etc.) and how a failure to consider your recommendation could have deleterious consequences (further erosion of profitability due to cost escalation, market share shrinkage due to competitor encroachment, etc.). Students usually err in this paragraph by providing too much descriptive information about the situation. Remember, company personnel, your boss in this case, are most often aware of the general background. Your goal is to identify the "big picture" implications of the situation.

Recommendation

In many of the cases you will be asked to choose from a finite set of alternatives. Thus, it is important to both identify the alternative you think is preferable and the key steps required to implement this alternative. Where alternatives are less clearly defined, your first job is to succinctly identify the alternatives. The key to writing a good recommendation is identifying the timing of interdependencies and key uncertainties in the steps or stages of your recommendation. Your goal is to provide written evidence that you understand the second and third-order effects of your recommendation. For example, some steps in a recommendation will clearly lead to the next step (decision to expand into new geographic or product market requires capacity) and may...
be written as an assertion. But, this step may lead to the consideration of multiple alternatives and hence, the development of contingency plans (additional capacity might be pursued by revamping existing production facilities, construction of new facilities, or formation of alliances, all of which vary in the amount and sources of capital required). Indeed, thinking about your recommendation as a system of relationships with varying time dependencies may lead you to revise the order in which the steps in the recommendation are presented.

Rationale

Here is where you link your recommendation to your analysis of the firm and its markets. The rationale should clarify how your recommendation helps the firm overcome the situation you identified in the introduction. For example, if, in your introduction, you argue that the firm's profitability is threatened, be sure to identify how your recommendation specifically improves the firm's profitability. The key to writing a good rationale is to make your logic or line of reasoning come full circle. Again, as in the introduction, this should not be a descriptive analysis of the situation. It is a statement of how your recommendation helps the firm's managers address the key external and internal issues confronting them.

*Notice there is no conclusion. Unlike academic writing, writing for a business audience requires you to say your peace as quickly and succinctly as possible. Therefore, your busy reader - if willing to trust you - shouldn't have to read past the introduction to know what you are recommending and why.

Smith, Timothy M. A Case Study, Marketing 4030: Sales Management. Carlson School of Management, University of Minnesota. 11 Nov. 2002.