Case Studies

Case studies are valuable in education because they offer students an opportunity to evaluate a specific scenario to arrive at a logical solution to a problem. Case studies are used in business when information is needed to solve a particular problem. Business case studies are useful because they present realistic scenarios that provide different perspectives to a business problem.

By using case studies, students can investigate examples of business problems. Case studies assist students in analyzing real-life scenarios by identifying business problems, defining objectives, examining alternatives, and discovering solutions to the problems.

Frequently, students are provided case studies to investigate and analyze in order to put newfound knowledge to practical use. Following are directions to conduct and write an effective case study analysis.

Preparing and Writing Your Case Study Analysis

Typically written in narrative form, a case study sets forth the events and organizational circumstances surrounding a particular managerial situation. Placing the reader at the scene, the simulated events provide an opportunity to evaluate alternative courses of action.

Case study analysis is used in academics to help demonstrate your ability to evaluate situations critically, to apply concepts you have learned in class, to solve problems, and to communicate your findings and conclusions.

Usually, no single right answer to a case exists. Most cases are intentionally ambiguous and can be viewed from many different perspectives. Several feasible solutions often are available for any case. The best solution is the one you can support with thoughtful analysis, logical arguments, and substantiating evidence through research or from your own experience. The goal in analyzing a case is to provide an effective solution to the situation and to support that solution with solid and persuasive evidence.

Overview

Analyzing a case study can take several forms, and you should check with your instructor for the specific approach or point of view that is recommended. For example, you might analyze the case from the perspective that you are the central character of the narrative and must report what you would do in the situation. On the other hand, you might play the role of an outside consultant hired to evaluate the circumstances and provide a report.

Make sure you allow enough time to perform the various tasks to investigate the scenario and write the analysis. These tasks are listed below and explained in more detail in the following sections.
Analyzing the Case
1. Read and study the case thoroughly.
2. Define the problems.
3. Select a focus for the analysis by identifying key issues and their causes.
4. Identify and apply course concepts in order to discover possible solutions.
5. Evaluate alternative solutions and select the solution you believe is best to resolve the problem.

Writing the Case Analysis
1. Determine how you want to present your views and to structure the paper.
2. Produce a first draft of the case analysis.
3. Revise and edit the draft.
4. Format and proofread the final report.

Analyzing the Case
1. Read and study the case thoroughly.
2. Read the case once for familiarity with the overall situation, background, and characters involved, noting issues that may be important. Read the case again and highlight all relevant facts. Make sure you understand the situation and have all facts. Make notes about issues, symptoms of problems, root problems, unresolved issues, and the roles of key players. Watch for indications of issues beneath the surface.
3. Define the problems.
   Identify the key problems or issues in the case. Case studies often contain an overabundance of information about a particular situation, not all of which may be relevant. Part of the skill of good case analysis is to determine which facts are relevant.
4. Select a focus for the analysis by identifying the key issues and their causes.
   Determine how to focus your analysis. Narrow the problems you have identified to between two and five key issues. Do not try to examine every possible aspect of the case. Identify the most important issues that relate to the concepts you have been studying in the course. Once you have focused on one or two key issues, try to gain a deeper understanding of their causes. Why do these problems exist? What caused them? What are the effects of the problems on the organization or the relationships among individuals in the organization? Who is responsible for or affected by the problems?
5. Identify and apply course concepts in order to discover possible solutions. (This section is included so that you become familiar with the application of case studies in the context of applying content-related course concepts.)
   a. Identify and apply one or more concepts discussed in class, covered in the readings, or learned from your own experience that would apply to the case and provide some insight or guidance in solving the problems.
   b. Review the texts and other readings in the course and your notes from class discussions, conduct outside research, and use your own knowledge and experience to decide what concepts, theories, or ideas could be relevant to solving the problem.
6. Evaluate alternative solutions and select the solution you believe is best to resolve the problem. Make certain you can support the solution with solid evidence from your case analysis. Weigh the pros and cons of each alternative. Which solution is the most feasible? Make certain you can defend that solution.

Now you are ready to present your ideas and structure your paper.

**Writing the Case Analysis**

Written case analyses are short, structured reports. Usually, the instructor will ask for between two and ten typed pages, depending on the complexity of the case. Some case studies are assigned as individual efforts; others are group projects. Still others may be a partial group effort, with the group collaborating in the analysis and each student preparing a separate written analysis.

Your task in writing a case analysis is to combine key issues of the case with your perceptions and supported opinions. You must then examine alternatives, select the most viable solution, and provide evidence to support your views. You obtain this evidence from text readings, class discussion, outside research, and personal experiences.

1. Determine how you want to present your views and structure your paper.

Case study analyses are written as reports with headings, not as essays. The report should clearly identify the relevant sections for the reader.

   a. Introduction.

Identify the key problems or issues in the case. Determine a thesis. Summarize, in one sentence, the principal outcome of your analysis. This is the thesis for the report, and it should be clearly stated in the first few paragraphs. The introduction always identifies the central problem.

   b. Background.

Place the central problem in a context for the reader, providing background information about the case, but not repeating unnecessary facts stated in the case. The background section demonstrates to the reader that you have researched the types of problems that the case study describes. Be sure to focus on the most important issues.

   c. Alternatives.

Now that you have researched the problems, identify possible alternative solutions to the problems. You do not need to analyze all possible alternatives. However, you should have considered several alternatives when you formed your opinion about the case. Discuss these alternatives and discuss why they were rejected. What are the constraints (e.g. money, time, personnel, resources) imposed and the reasons that you do not recommend the alternatives at this time?

   d. Proposed Solution.

Discuss your proposed solution, providing support with solid evidence. Generally, you should provide only one proposed solution. Keep in mind that in the context of the case study, the characters or company can start with only one solution at a time. Which one do
you propose and why? Justify why this solution is the best option through a logical argument supported by research. The proposed solution should be specific and realistic.

e. Recommendations.
This section discusses specific strategies to accomplish the proposed solution. You might want to recommend further action to resolve some of the issues. Be specific about what should be done and who should do it. (Check with your instructor as to whether this section should be included in your case analysis report.)

2. Produce a first draft of the case analysis.
3. Revise and edit the draft.
4. Format and proofread the final report.

Case study reports are written in a structured format, not as narrative essays. They might include an Executive Summary that contains a quick, easy-to-read summary of the main parts of the case study: introduction, background, alternatives, and proposed solution sections of the report. If an Executive Summary is included, it should contain only information discussed in the report. (Check with your instructor to see if an Executive Summary should be included.)

Tips for formatting the final report:

a. Use relevant headings, but do not include a separate heading titled “Introduction.”
b. Include any relevant appendices and references (if applicable) in proper APA format at the end of the report.
c. Use 12-point font for ease in reading.

Following the above guidelines will enable you to analyze the case successfully by identifying problems, examining alternatives, discovering solutions, and presenting your findings in a formal report. A sample case study scenario and corresponding analysis are provided below.

An APA standard format for Case Study assignments does not exist. APA is designed to prepare documents for publication and does not provide requirements on the correct format or content of Case Studies. This sample is to provide basic guidelines for Case Studies, and in the event that the faculty member’s standards differ from the sample, the faculty member’s own standards will prevail.

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**Sample Case Study Scenario**

XYZ Corporation (XYZ) markets widgets, and revenue has been increasing for the past four years. In order to increase profits further, XYZ plans to expand its business operations to an international market. The company seeks to open a branch in Japan because a preliminary study found that by expanding the market to include Japanese consumers, XYZ can expect increased revenues even during the first year of business in Japan.

Unfortunately, XYZ has no experience in international marketing, and CEO Tom Barker knows that several essential elements must be explored before the company embarks on the expansion: A new branch of the company must be opened in Japan; new employees, including management, must be hired; an advertising campaign must be created that will attract new Japanese consumers; and marketing materials must be developed for an international market.

Barker met with executives at XYZ to explain the proposed expansion and the dilemma of expanding the business to Japan and obtaining a successful outcome. Vice President Bill Higgins was tasked with determining the best course of action to create a plan to obtain profits in the new market as soon as possible.

Higgins understood that a major aspect in doing business with the Japanese was to understand the cultural differences between the United States and Japan. Many international business ventures have failed because of a lack of understanding of cultural values, and CEO Barker made it clear that XYZ’s goal was to increase business and profits with the proposed expansion. Therefore, Higgins must consider not only the challenges of the business expansion but also the problems of dealing with people in an international marketplace. He must consider several elements that would not be of concern in a domestic market but might reflect negatively
on XYZ in Japan if inadvertent or inappropriate words or actions on the part of company representatives are used during the course of business.

Overwhelmed by his task, Bill returned to his office, sighed, and said, “Where do I begin? What needs to be done to ensure a successful outcome in creating a plan to expand the business to Japan?”
XYZ Corporation (XYZ), like all businesses, strives to be successful and generate profits. Manufacturing widgets has been profitable for the company, and studies have indicated that the company could expect to see growth by opening a branch of the company in Japan.

Challenges are inherent in any international marketing effort, particularly for XYZ, because business interaction in a foreign culture can be drastically different from the business culture in America. CEO Tom Barker has directed Vice President Bill Higgins to create a proposed expansion plan by investigating approaches to opening a branch in Japan, hiring management and employees, and creating marketing materials that will be effective in attracting Japanese consumers.

Prior to any effort to increase profits through this expansion, problems must be recognized and solutions identified. The expansion plan must be clear and specific, and marketing materials must be appropriate for an international marketplace.

**Background**

This case study identifies issues involved with opening a new branch of the company in Japan and the problems associated with acquiring management and employees and developing marketing materials to attract consumers. This analysis will focus on the main issues that could affect the expansion.

Higgins’ task is difficult. The key issue is that because of the cultural differences, methods of doing business with Japanese customers could be different from those dealing with American consumers. The problem centers on learning about and understanding the cultural
differences between America and Japan in order to effectively complete the steps necessary to ensure success of the business venture.

**Key Problems**

One of the main problems is that no one at XYZ has the experience in international business to effect a successful outcome in an international market. The key problems that Vice President Higgins needs to investigate before presenting a plan to CEO Tom Barker include the following elements:

- Locate new company offices
- Hire management for Japan
- Hire new employees
- Develop new marketing materials

**Locate New Company Offices**

The first task is to decide on a location. Many major companies have offices in Tokyo, and it might be best for the company to create a presence in this major city, but cost-of-living must be considered. Once the city has been decided, an appropriate location within the city must be found.

**Hire Management for Japan**

To hire managers that can direct Japanese operations, Higgins must make three major decisions: hire someone within the company, hire an experienced American executive, or hire a Japanese executive. These choices have advantages and disadvantages.
Hire New Employees

This will be a minor problem once the location and management decisions have been made. The main employment problems are whether to hire Japanese or American employees or a combination of the two.

Develop New Marketing Materials

In an international market, focus must be on the values of the culture in which the advertising takes place. The problem here is a lack of information about the cultural values of Japan. Insensitive marketing materials could sabotage the company objectives by reducing or eliminating demand for the product. Solving this problem is critical to the success of the venture.

Possible Solutions

Higgins realized that he must do extensive research to discover the best course of action for the company. Through a preliminary search of international business on the Internet, Higgins learned that the most effective method for businesses to obtain information about a foreign market is to hire a consultant who is an expert in the culture and business traditions of the country.

According to one business article, “Every problem has an inherent variety of solutions” (“International Business,” 2005, p. 8.) Perhaps the best course for Higgins to follow is to outline the list of problems and create a list of possible solutions. Johnson (2003) suggests that solutions must not be implemented without a complete understanding of the situation, the problem, and the outcome. There are several viable alternatives to solve Higgins’ problem.
Locate New Company Offices

The first step is to determine the city where the office should be located. The company must develop minimum parameters for the city as well as for the location of the building within the city. A consultant could be hired who is familiar with the area and the culture. Another solution could be commissioning a study to investigate possibilities, examine issues, and present a conclusion.

Hire Management

As stated in one business article, “A company is only as successful as its managers” (“How to Develop a Successful International Business,” 2005, p. 18). Since management is an important element of a successful business venture, XYZ must be careful in making the correct decision. The possibilities are to promote a manager from within, bring in an outside manager from the United States, or hire an experienced Japanese manager who is familiar with the culture and who has experience in conducting business with an American company.

Transferring a current company manager would be advantageous because he or she would already be familiar with the company culture. Promoting from within “always has advantages for the company; however, it can also be beset with disadvantages. A current employee can begin new tasks with a small learning curve while someone brought in from outside the company requires indoctrination into the company culture” (Smith, 2004, p. 83). Since the manager would be transferred to an international market, the advantages of a current company employee might be offset by a lack of experience in the international marketplace.
**Hire New Employees**

The decision to hire new employees cannot be made until the management decision has been made. XYZ could hire only Japanese employees or transfer some employees from the United States. Using only American employees would be problematic to the success of the company because it could be perceived that XYZ would not be supporting the local economy.

**Develop Marketing Materials**

The problems are obvious in developing marketing materials for an international audience. Cultural values need to be explored, and Japanese perceptions must be understood to develop any effective marketing tools. This means that the current advertising campaigns used in the United States probably would be ineffective in the Japanese market. The problem then becomes identifying cultural values and creating effective marketing tools.

**Proposed Solution**

Higgins’ responsibilities are enormous. If he suggests an incorrect course of action, the expansion could be costly and unsuccessful. However, if he recommends viable alternatives, XYZ will, most likely, succeed in its efforts to create a presence in Japan and increase business.

Higgins recommends to CEO Barker that the first thing XYZ should do is hire a consultant who is familiar with the business culture in Japan. This could be done by contacting the Japanese consulate in San Francisco to locate names of executives with experience both in dealing with American companies and with managing a successful business in Japan.

Once retained, the consultant would be instrumental in suggesting possible successful locations for the business and in recommending the most appropriate alternatives to create a successful expansion. Since the management culture in Japan is so different from that in the United States, it is probably best to use Japanese managers and employees, yet have an American
president or CEO who understands the culture and has successful business experience in Japan. Although this approach might be unpopular with current company managers who are hoping for a transfer, it is probably the best alternative.

The consultant could also work closely with the Marketing Department to develop appropriate marketing materials for a Japanese market. The most viable alternative is to hire a Japanese public relations firm that would collaborate with the top marketing people at XYZ to create a successful advertising campaign.

**Conclusion**

Considering the above elements has made Higgins more prepared to accomplish his assigned task. By examining the cultural differences and evaluating the different approaches the company could take, Higgins will able to create an effective plan that will be instrumental in creating a successful international business venture.
References


