

FRAMEWORK FOR CASE ANALYSIS

Adapted from UMASS BOSTON COLLEGE OF MANAGEMENT
Framework for Case Analysis

Case studies are excellent tools to bridge the gap between academic learning and real-world situations and are widely used to analyze business problems or dilemmas. During your academic career, you may be expected to analyze a business case by identifying underlying issues, solving problems, and writing a report or delivering an oral presentation to present a feasible course of action. This handout provides information that will help you in thinking about cases and preparing reports or delivering presentations.

WHAT IS A CASE?

A case

- relates a story that illustrates a business theory or concept
- presents a problem or problems to solve
- ends typically in a dilemma faced by the character or organization in the case
- is often accompanied by questions to address
- asks you to identify problems and underlying issues and/or determine a course of action to take in the future

WHY CASE COMPETITIONS?

Case competitions

provide students with opportunities to develop essential critical thinking and analysis skills, such as the aptitude to:

- ⇒ respond actively and constructively to conflicts in organizational life
- ⇒ understand the consequences and limitations of managerial actions
- ⇒ consider multiple opinions and perspectives on a situation, using theories, concepts, discussion, or research
- ⇒ differentiate between facts and opinions
- ⇒ examine the total situation instead of focusing on its more obvious or pressing elements
- ⇒ recognize that a case may have many problems and that different stakeholders will hold varying viewpoints on the situation
- ⇒ integrate learning into business analysis to develop and advance one's thinking

CASE ANALYSIS PROCESS

ELEMENTS of ANALYSIS

1. Use theory, concepts, models, and research findings to identify problems and deepen your understanding of the case; locate relevant info in the case	7. Identify additional information needed to analyze the case fully; acknowledge any information that is missing or unavailable in the case
2. Develop a chronology of major and minor events that are relevant in the case	8. Identify the basic issues to confront and the relationships among them and to each other; decide what deserves attention and what can be ignored safely
3. Describe the industry in which the firm or organization operates	9. Evaluate any available quantitative info in the case, and determine if the data oversimplify the issue or situation; look for data patterns
4. Describe key issues and trends in countries where the firm or organization operates	10. Consider the array of problems to solve, and create at least two different courses of action that are logical, feasible, practical, and specific
5. Identify all relevant stakeholders in the case; suspend judging what kind of people they are, and avoid making assumptions about them	11. For each possible course of action, identify the positive and negative consequences for the stakeholders, impacts on the firm or on other problems, and difficulties in implementing the actions
6. Describe each stakeholder's problems, goals, and concerns; identify their biases to understand their underlying concerns	12. Decide on a set of recommendations and provide a rationale for each one; create a plan for implementing the recommendations



FRAMEWORK FOR CASE ANALYSIS

WRITING A REPORT ON YOUR CASE ANALYSIS

If you are asked to write a report on your case analysis, consider this general framework. You may add or delete sections based on the context of the case and the purpose of the case analysis.

INTRODUCTION

overview: case description

purpose of the report: focus of the report, compiled as a result of research and analysis of data and issues, and geared to a specific audience

report organization: major sections and order of presented information

BODY

facts: concise statement of relevant facts

analysis of case questions: key points fully developed, with heading and subheadings for each question

relevant evidence: concept, theory, model or research for each question; interpret in context of case

identification of case events: situations and/or underlying issues that are troublesome or create uncertainty in the case

environment: economic, cultural, social, political, or legal considerations; industry and trends in which firm operates; mission, objectives, and constraints of firm

stakeholder analysis: assumptions, biases, concerns, and goals of each stakeholder

identification of problems: key issues, problems, or uncertainties raised in the case

alternative solutions: when an array of problems, description of 2-3 alternative solutions that might be adopted to address the problems

strengths and weaknesses of each course of action: analysis of course of action and effect on firm, and stakeholders, difficulty in implementation, and possibility of creating new problems

recommended solutions: rationale(s) for each solution, impact on firm, and process of implementation

CONCLUSION

sum up: brief recap of issues posed in the case

relevance of recommended solutions: benefits for the organization and/or stakeholders

DELIVERING AN ORAL PRESENTATION ON YOUR CASE ANALYSIS

If you are asked to deliver an oral presentation on your case analysis, consider the purpose of the presentation, the context of the case, and the audience in attendance.

OUTLINE OF AN ORAL PRESENTATION

Similar to the written report framework to the left, include these major sections in your oral presentation:

Introduction

Body: presentation of key case information, analyses, and evidence to support course of action

Recommendations

Conclusion

ORAL PRESENTATION TIPS

- If collaborative delivery, divide responsibilities equitably among team members, and plan smooth segues
- Analyze and interpret information for deeper audience understanding and buy-in
- Use data to support ideas and key case information; interpret data for the audience and provide sources
- If accompanied by a written report, avoid reading word-for-word from it; instead, use talking points instead
- Use slide design to convey key case information but keep text to a minimum
- Use effective visual design to illustrate your points, to help your audience visualize your ideas, and to convey yourselves as knowledgeable and competent presenters

Check out these helpful handouts on presentation delivery and design on the Business Communication Center's RESOURCES Page:

[Effective Presentation Deck Design](#)

[Visual Aids in Oral Presentations](#)

[Delivering Effective Presentations: Strategies for Relaxation and Professionalism](#)

SOURCES:

UMASS Boston College of Management Faculty, Course 650. (n.d.). *Framework for case analysis* [PDF File]. Retrieved July 1, 2019, from University of Massachusetts Boston website: https://www.umb.edu/editor_uploads/images/college_management/Framework%20for%20Case%20Analysis.pdf

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