**MARKETING**

**Analyzing a Case Study**

**Reading a Case Study**

Students often have problems analyzing a case study or other materials. Each instructor may have his/her own idea but here are a few guidelines to keep in mind:

1. Read through the case study once to get a feel for the information. If there are questions at the end, make notes for the next step.
2. Read through the case a second time. This time highlight important information: the who, what, when, where, why and how of the case.
   * Make notes, either in the margins or on a separate sheet of paper.
   * If there were questions at the end, look for the answers as you read through the material a second time.
3. Review any exhibits, graphs, photos, etc. that may be included with the case.
4. When you are doing a detailed reading of a case study, look for the following sections. These sections may have headings or may just be a paragraph or two. You will have to read the information carefully to see if any of this type of information is available:
   * **Opening paragraph** - introduces the situation. Look for details on the tone of the case.
   * **Background information** - look for information on the industry, organization, products, history, competition, financial information, personal information on people involved and anything else of significance.
   * **Specific (functional) area of interest** - is the case about marketing, finance, operations, human resources, etc. Then narrow it down to a specific section inside each area, i.e.: if the area is HR, then does it concern recruitment, selection, training, etc.,; if the area is marketing, does it concern advertising, promotion, distribution, retailing, etc.
   * The **specific problem** or decision to be made.
   * **Alternatives** open to the decision maker, which may or may not be stated in the case. You may have to generate alternatives or you may have developed other alternatives besides those given in the case.
   * **Conclusion** - This will set up any tasks, constraints or limitations that may need to be considered. This section may also state the urgency of the problem.

**Analyzing a Case**

Analyzing any case should include the following steps:

1. **Defining the issue(s)**- What appears to be the problem? What are the immediate issues that need to be addressed?   
   Look at things that may have an impact on such areas as profitability, strategic direction of the company, source of competitive advantage, morale of employees or customer satisfaction.
2. **Analyze case data** - How or why did these issues arise? What resources were used or may be needed? Who is affected most by the issue(s)? What constraints or opportunities are involved in this situation? What do the numbers tell you?
3. **Generating alternatives** - There are many ways a problem can be solved. Be realistic. Alternatives must fit the constraints of the situation and be realistic. Not making a decision is not an acceptable decision for most case studies. It could be an alternative but generally is not the accepted solution.
4. **Key decision criteria** - When choosing an alternative to solve your case you must consider certain criteria. These will be different for each situation. These criteria can help you make your decision based on the alternatives generated. Some things to keep in mind.
   * How can I improve profitability?
   * How can I increase sales, marketing, recruiting or selecting?
   * How do I maintain or improve customer service?
   * How can we be consistent with our corporate mission or strategy?
   * Are the alternatives within our capabilities? Resources? Risk?
   * Can we minimize environmental impact? Employee impact?
5. **Evaluation of alternatives** - Once you have moved through the steps above, your choice of an alternative should be straightforward. Measure each alternative against the criteria. Sometimes a simple table will help with the decision - or you could list the pros/cons of each alternative.
6. **Recommendation** - You must make a recommendation. You should justify your decision based on your reading and analysis of the case.

**Structure of the Written Report**

Again, each instructor may require different formats for case studies. Here are some guidelines as to what should be included:

* Title Page
* Table of Contents
* Executive Summary
* Problem (Issue Statement)
* Data Analysis
* Key Decision Criteria
* Alternative Analysis
* Recommendations
* Action and Implementation Plan (if required)
* Exhibits as Appendices

Some case studies have questions that have to be answered that will assist in analyzing the case. A simpler format may then be used:

* Title Page
* Questions answered in order and numbered.

**Writing a Quality Report**

1. ***Proof-read your work!*** Not just on the screen but also on the hard copy after it has been printed. Fix errors before submitting.
2. Use spell checker to eliminate spelling errors.
3. Use grammar checking to avoid common grammatical errors such as run-on sentences.
4. Generally restating the facts of the case is not part of the report.
5. If you are using exhibits, make sure that you refer to them in the report as well as attach them at the end in an Appendix.
6. Plan for unexpected problems. Do**not** leave writing your report to the last minute. Many instructors will *not* accept late reports, or, if they do, marks are deducted - and every mark counts!
7. ***Proof-Read your work!*** This cannot be stressed enough. If you do not feel that you are a good proof-reader, have someone else read it. Often we are too close to a report that we do not see simple spelling or grammatical errors. Sometimes, just finishing the report a couple of days ahead, putting it aside and going back to it can make all the differences. Fresh eyes may see more mistakes than tired ones!!

**Marketing**

Case Presentations Evaluation

Students: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Case:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Start Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Finish Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Directions – A scale of 1-5 appears under each item. The scale corresponds to a level of performance ranging from 1(poor) to 5(excellent).

**PRESENTATION - KNOWLEDGE OF CASE**

**(as demonstrated by questions asked of presentation team)**

|  |  |
| --- | --- |
| **Criteria:** |  |
| 1 - Critique team appears to have limited knowledge of the case and its issues – questions asked were not insightful and indicative of a lack of preparation. |  |
| 2 - Critique team appears to have some knowledge of the case and its issues, but also appear to have done little supplementary analysis to support their critique. |  |
| 3 - Critique team demonstrated satisfactory knowledge of the case. |  |
| 4 - Critique team demonstrated extensive knowledge of the case; the team asked questions that reflected some insight and level of critical thinking. |  |
| 5 – Critique team demonstrated superior and extensive knowledge on all aspects of the case by asking questions that reflect critical thinking and insight. |  |

**PRESENTATION - OBJECTIVITY**

|  |  |
| --- | --- |
| **Criteria:** |  |
| 1 - Critique was unsubstantiated, based primarily on opinion, and gave no direction for improvement. |  |
| 2 - Critique provided some useful evaluation, however, much of the evaluation was unsubstantiated. |  |
| 3 - Critique provided some constructive relevance although not all of the evaluation was relevant or accurate. |  |
| 4 - Critique was relevant, accurate, fair, and constructive. |  |
| 5 - Critique was relevant, accurate, fair, and constructive. In addition, the critique provided the case presenting team with detailed directions for improvement of their solution. |  |

**PRESENTATION - THOROUGHNESS OF EVALUATION**

|  |  |
| --- | --- |
| **Criteria:** |  |
| 1 – Critique provided little-to-no evaluation of the case analysis components. |  |
| 2 – Critique provided a superficial evaluation of the case analysis components. |  |
| 3 –Critique provided a satisfactory evaluation of the case analysis components, but lacked depth in one or two of the areas. |  |
| 4 –Critique evaluated aspects from all areas of the case including the analysis of the case, and the problem-solving skills demonstrated. |  |
| 5 – Critique evaluated fully the quality of the presenters’ case analysis and problem-solving skills. |  |

**PRESENTATION - TEAMWORK**

|  |  |
| --- | --- |
| **Criteria:** |  |
| 1 – Critique team appeared to be dominated by 1-2 individuals or there appeared to be substantive conflict among the team. |  |
| 2 – Critique team appeared to be operating as individual members rather than as a cohesive unit. |  |
| 3 – Members appeared to be operating as a team – although not all members seemed equally represented. |  |
| 4 – Members appeared to work well together in carrying out this assignment. |  |
| 5 – Members worked exceptionally well together in carrying out this assignment. |  |

**PRESENTATION - PROFESSIONALISM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria:** | | |  | | |
| 1 – The critique was poorly ordered and inconsiderate to the presenting team. | | |  | | |
| 2 – The critique was at times considerate, but of little use to the presenting team. | | |  | | |
| 3 – The critique team demonstrated a satisfactory level of professionalism. | | |  | | |
| 4 – The critique team appeared very professional and mostly knowledgeable.  *5 – The critique was mature, considerate, and well-ordered. Each critique team member appeared professional and knowledgeable.* | | |  | | |
| **Comments** |  | **TOTAL** | |
|  |  | /25 | |
| **Marketing**  Written Case Evaluation  ***WRITTEN REPORT - KNOWLEDGE OF CASE***   |  |  | | --- | --- | | **Criteria:** |  | | 1 - Critique team appears to have limited knowledge of the case and its issues – questions asked were not insightful and indicative of a lack of preparation. |  | | 2 - Critique team appears to have some knowledge of the case and its issues, but also appear to have done little supplementary analysis to support their critique. |  | | 3 - Critique team demonstrated satisfactory knowledge of the case. |  | | 4 - Critique team demonstrated extensive knowledge of the case; the team asked questions that reflected some insight and level of critical thinking. |  | | 5 – Critique team demonstrated superior and extensive knowledge on all aspects of the case by asking questions that reflect critical thinking and insight. |  |   ***WRITTEN REPORT - OBJECTIVITY***   |  |  | | --- | --- | | **Criteria:** |  | | 1 - Critique was unsubstantiated, based primarily on opinion, and gave no direction for improvement. |  | | 2 - Critique provided some useful evaluation, however, much of the evaluation was unsubstantiated. |  | | 3 - Critique provided some constructive relevance although not all of the evaluation was relevant or accurate. |  | | 4 - Critique was relevant, accurate, fair, and constructive. |  | | 5 - Critique was relevant, accurate, fair, and constructive. In addition, the critique provided the case presenting team with detailed directions for improvement of their solution. |  |   ***WRITTEN REPORT -******THOROUGHNESS OF EVALUATION***   |  |  | | --- | --- | | ***Criteria:*** |  | | *1 – Critique provided little-to-no evaluation of the case analysis components.* |  | | *2 – Critique provided a superficial evaluation of the case analysis components.* |  | | *3 –Critique provided a satisfactory evaluation of the case analysis components, but lacked depth in one or two of the areas.* |  | | *4 –Critique evaluated aspects from all areas of the case including the analysis of the case, and the problem-solving skills demonstrated.* |  | | *5 – Critique evaluated fully the quality of the presenters’ case analysis and problem-solving skills.* |  | | | | | |  |

***WRITTEN REPORT –******OVERALL***

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| --- | --- |
| ***Criteria:*** |  |
| *1 – Report lacked key elements and demonstrated little appreciation for proper presentation.* |  |
| *2 – Report lacked key critical element.* |  |
| *3 – Report provided satisfactory evaluation of the case analysis components, but lacked depth.* |  |
| *4 –Report presented and evaluated aspects from all areas of the case including the analysis of the case, and the problem-solving skills demonstrated.* |  |
| *5 – Report evaluated fully the quality of the presenters’ case analysis and problem-solving skills.* |  |

|  |  |  |
| --- | --- | --- |
| **Comments** |  | **TOTAL** |
|  |  | /20 |

**Marketing**

**Case Analysis Self/Group Evaluation**

Please rate the work that each member of your group put into this case presentation project on a scale of 1 to 5. Indicate your choice by circling the appropriate number for each group member.

1 – No Effort

2 – Minimal effort

3 – Average effort

4 – Above average effort

5 – Did practically all of the work

Case Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rating Scale

Group Members (including you)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 1 2 3 4 5

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 1 2 3 4 5

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 1 2 3 4 5

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 1 2 3 4 5

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 1 2 3 4 5