

Case Study Analysis

This handout provides you with information about how to analyze a case study and write up your analysis in a professional report, letter, or memo format.

Analyzing a Case Study

What exactly does it mean to analyze a case study? Analysis means you look at a situation from various angles paying attention to even the smallest details, as it is usually details that lead you to understanding a situation to its fullest and help you make effective decisions. To analyze a case study, follow these basic guidelines:

1. Read carefully
2. Identify major issues
3. Identify alternative courses of action
4. Recommend a course of action
5. Provide a rationale for your decision

Read Carefully

Every case study you encounter will be different. Generally, there is no set format or formula for how these documents are written (except that, normally, they are written chronologically), so it is important that you pay attention to all of the details. Read slowly and carefully, taking notes or annotating the document. If appendices are included, read those carefully too, as the smallest detail can make a difference in what you determine is the best course of action. Read tables and figures carefully, and interpret them in relation to the information contained in the case study.

Identify Major Issues

Your main job when analyzing a case study is to learn to identify major issues of concern for you or your company. Do not focus on minor issues (issues that have no bearing on the case, such as personal biases or preferences), but stay focused on major issues, such as actions or decisions that affect other people, the company's financial bottom line, or a company's reputation. It is important to clarify here that details are not minor issues. Details are individual instances of action, but details can provide evidence for how a major issue is being affected. For instance, if someone is consistently sending out poorly written letters with misspellings and grammar errors to clients, that's a detail; however, that detail is evidence that the company's reputation is at stake.

Once you identify major issues, look at how they are being presented or compromised in the case study so that you have a basis for how to effectively deal with the situation and solve the problem. Typically, case studies are written in chronological order, so it may take several readings to identify major issues correctly (O'Rourke, 2007) and from various perspectives.

What is a Case Study?

A **case study** is a narrative used to help students practice real-life analysis and communication skills. It is a learning tool. It provides readers with "enough detail...to understand the nature and scope of the problem, and...serve as a springboard for discussion and learning" (O'Rourke, 2007, p. 391).

A case study differs from a **case history** in that a history summarizes events that already took place, and usually include the manager's response to the situation (O'Rourke, 2007).



Identify Alternative Courses of Action

This is where you put your course knowledge to work. What have you learned about how to solve certain issues through your course material and discussions? To identify an appropriate course of action, or identify several ways to deal with a situation, you will apply what you have learned to your understanding of the case study and the major issues you have already identified. This is also where you have to read your case study questions carefully and be sure to answer them according to your professor's guidelines. The information you provide in this section of a case study analysis should all be based on professional knowledge and information gleaned from your courses.

Recommend a Course of Action

A recommendation is a plan for implementing a certain course of action that you deem to be the most advantageous. Choose from one course of action that you identified in the earlier section and set forth the details for how to put this decision into action. Who needs to do what, when, where, and how? No one can read your mind, so be detailed and precise in your description on the execution of your recommendation.

Provide a Rationale for Your Decision

It's one thing to recommend a course of action and even detail out the plan you have in mind, but your readers will not be thoroughly convinced that it is the right decision until you offer them your rationale for your decision. What this means is that you provide them with reasons for the conclusions you have drawn, including any additional or outside research you have conducted to substantiate your decision. Readers want to know why and how you came to the decision you have regarding the situation in the case study.

Analysis Tools

Before you get started writing your case study analysis, it is helpful for you to review the case study using one or more of the tools listed below. These tools are currently used in many businesses. Each one is designed to help you identify critical issues in the case study, which will help you write a more accurate case study analysis with a logical recommendation. Your instructor may have certain requirements and ask you to use one or several of the tools below in your case analysis.

SWOTT Analysis: SWOTT is an acronym for Strengths, Weaknesses, Opportunities, Threats, and Technology. It is an analysis tool that is used to analyze a company. Simply put, it is a framework to help you look at various aspects to a company. This framework sets you up nicely to ask questions about the company based on your case study in order to determine what issues might affect a company the most. A quick search in the Kaplan Library's Business Source Premier database will result in numerous articles that use SWOTT (or SWOT [minus the technology]) for company analysis.

Fishbone (Ishikawa) Diagram: This is a cause and effect tool that helps you determine the major problems in a case study and formulate a problem statement. A quick search on the Internet will result in multiple sites that show this diagram and how it can be used.

Flowchart Diagram: A flowchart diagram is a process diagram. Process diagrams are beneficial to visually display a process of any kind. Processes are oftentimes viewed differently by each individual, so such a display will help readers understand where a process is breaking down or how to improve an existing process, or even develop an entirely new process. There are various software programs that specialize in drawing flow charts, and even Microsoft Word has a simple flow diagram tool, and a quick search on the Internet will show what such a diagram looks like.

Capital Budgeting Analysis: This is a financial tool that helps you to understand the financial implications of a situation. It helps one to see the cost benefits or how the bottom line is affected. [A template of a capital budgeting analysis is provided by clicking on this link.](#)

What Does a Case Study Analysis Look Like?

Depending on your instructor and/or class, you may be asked to write your case study analysis in several ways: as a [report](#), a [business letter](#), or [memo](#). Click on the links to see common formats for each one of these documents.

Additional guidelines for preparing your case study:

- Do not paraphrase or summarize the case study in your analysis. Use the case study to help answer key questions provided to you by your professor or on the assignment. As mentioned previously, case studies are used as learning tools, so the purpose of writing a case study analysis is to demonstrate your learning through your analysis and recommendations. Base your analysis and recommendations on course material and other relevant outside research.
- Use a deductive rhetorical strategy, which means to start with an overarching statement that is supported in subsequent parts of your analysis with plenty of details.
- In real world situations, you cannot assume your readers are as familiar with a case as you are, so use plenty of detail and fully explain any conclusions you draw from the case.
- Use proper citation and other guidelines for good, solid writing, such as not over quoting, categorizing information into sections or under subheadings, paying attention to correctness, and revising and editing carefully (Fiermont, n.d.).

References

- Fiermont, R. (n.d.). Notes on Successfully Preparing Case Studies.
- O'Rourke, James S. (2007). *Management Communication: A Case-Analysis Approach*. Upper Saddle River, NJ: Pearson/Prentice Hall.
- Salinas, A. (n.d.). Capital Budget Analysis template.

Writing a Case Study Analysis Report

A report is a generic term for a business document that provides general information about a project or company. There are various types of reports (i.e., progress, feasibility, informative) and the way reports are formatted and written vary according to the purpose and audience of the document. A case study analysis may be written as a report in which case you might consider using the following structure:

1. **Introduction or Background** – This section introduces the purpose of the report, which is to offer an analysis and recommendation for a course of action based on a certain situation (the case study).
2. **Major Issues** – In this section, identify major issues that result from the case study. Also explain how these issues are part of the problem or are being compromised according to the details in the case study.
3. **Alternative Courses of Action** – In this section, provide readers with various options for solving the problem. This shows you have thought through the situation from various angles.
4. **Recommendation** – Recommend one course of action from the previous section. Provide a rationale for this course of action, as well as details about how this action should be implemented.
5. **Conclusion** – Every document has to have a conclusion. In this case, you can reiterate your recommendation and how that recommendation will solve the issues mentioned in the second section of this report.

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Writing a Case Study Analysis Business Letter

A business letter is generally used to build relationships; however, in some cases, business letters can serve as vehicles for sharing information. If asked to provide a case study analysis through a business letter, you will want to follow these general letter-writing guidelines.

Introduction: Every business letter should have an introductory paragraph that announces the purpose of the letter.

Body paragraphs: Once the purpose has been established in the introductory paragraph, use the body paragraphs to describe or explain relevant details according to your reader's needs. For a case study analysis, use these paragraphs to identify major issues and recommend a course of action, as well as provide your rationale for your recommendation. Usually, you will not include your analysis tools in a business letter like you might in a report. You can still use the tools, but because a business letter is generally more succinct and concise than a report, generally, you would not show your analysis.

Conclusion: Every business letter should include a closing paragraph that may, in this case, reiterate your recommendation and/or let the reader know what you would like him or her to do as a result of the letter.

A business letter should always include the sender's address, a date, the receiver's address, and an opening and closing salutation as shown in the following example.

Example 1: Sample Business Letter Using Block Style Formatting

Front Range Design and Printing
1234 University Avenue, Denver, CO 80936
303-555-5555, <http://www.frdesignandprinting.com>

September 27, 2010

Dr. Roberta Perez
Front Range Technical Institute
2266 Technical Institute Way
Falcon, CO 80831

Dear Dr. Perez:

Thank you for choosing Front Range Design and Printing to create and print the marketing brochures for Front Range Technical Institute. Per our phone call yesterday, we are ready to begin the design process and welcome any level of involvement you choose.

Your designer is Patricia Beltran, who will contact you this week to set up an appointment to gather information on brochure size, paper, colors, logo permissions, and standardized design of all pieces. She also will ask for contact information for each department that will need a brochure. Patricia works directly with the writer for your project, Alex Trujillo, who will be working with the contact person in each department to gather information for the text of the brochures.

Once a preliminary design has been created and a draft of the text is written, we will provide you with mock-ups for approval. There are approximately four stages of approval in the design process and two approvals needed when the brochures go to print. We will notify you one week in advance of each approval needed. Patricia also will provide you with a timeline for completion after your initial meeting with her.

We look forward to serving Front Range Technical Institute, and like all of our customers, we will provide you with our best professional and personalized service at all times. If at any time you have questions or concerns, please contact me at 303-555-5555 or at annbrand@xpress.com.

Sincerely,

Ann Brand

Ann Brand, President

Example taken from:
Martinez, D. Peterson, T., Wells, C., Hannigan, C., & Stevenson, C. (2008). *Technical Writing*. New York: Kaplan Publishing, Inc.

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Writing a Case Study Analysis Memo

A memo is an internal form of communication, meaning memos are not usually sent to clients or customers. They generally stay in-house and are used to communicate company information. Sometimes, you may be asked to report your findings of a case analysis through a memo. The format for a memo is as follows:

Date: Current date

To: State the person's name and title on this line (Diane Hendrix, CEO)

From: State the sender's name and title on this line (Joe Morgan, Customer Service Representative)

Subject: Be brief, but descriptive in your subject line

Sometimes the Date, To, From, and Subject lines are single spaced and sometimes they are double-spaced depending on your company's preference. The body of a memo is single spaced and follows the Subject line (double-space after the Subject line). Double space between the paragraphs. The body of the memo can be set up similar to the format for a case study analysis report (see outline for a report above). You may also use subheadings in a memo for easier reading. While a memo is also a shorter type of correspondence than a report, for instance, you may or may not want to include information from your analysis tools, depending on whether or not you think the reader needs to see that information (or your professor asks for it). Usually, that kind of information might be extraneous for a memo, but you should always check with your reader first to verify if it is needed or wanted.

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