



MBA Case Write-up Guidelines

Overview

The purpose of this document is to provide M.B.A. students with some formal guidance on how to write a good case analysis. I expect all students who work with me to read this document and apply the points to their drafts before they submit a draft for me to review.

A very useful tool to help students organized a good paper is outlining. By outlining, I mean structuring the logical argument behind your analysis, not just listing the sections of your paper. Thus, the outline should be point driven and not topic driven. Here is a useful Internet source for outlining - <http://owl.english.purdue.edu/owl/resource/544/01/>.

Content

Problem Statement - the heart of your analysis

Your case analysis is about recommending a strategy to a firm to address a problem. Thus, the most important section of your paper is the problem statement. In general, every fact you cite, point you make, conclusion you draw, and/or recommendation you make should be supported by factual observations and logical conclusions that follow from your factual observations. In addition, all your factual observations should lead to a conclusion or recommendation. Far too many students' early drafts are just laundry lists of observations, many of which have no relevance, or at least no clear relevance, to the problem statement. You don't need to review all the facts you can think of about your firm and its environment, just focus on those facts that are relevant to defining and solving your problem statement.

Structure of Your Analysis

Here is a brief overview of how you should structure your analysis:

- Title page - no page numbers
- Table of contents - if one page, no page numbers. If more than one, use roman numerals to differentiate from the body of the paper.
- Executive summary - a top-level summary of your paper to include your analysis and conclusions. This should be no more than two pages and capture the highlights of your analysis. This is not an introduction, it is a summary of everything you wrote in your analysis.
- Case summary or introduction, to include strategic posture - set the stage for your analysis by providing some history about your firm and characterize their current condition. Your points should lead to your problem statement and set the stage for it.
- Problem statement - a clear, short statement of the problem for which you will be providing recommendations. Up to this point, your paper should be focused on describing features of the firm and its environment that lead to the problem statement. Everything after this point should be focused on developing a recommended solution.
- External Analysis - Those features of the firm's environment that inform your efforts to find a solution to your problem, not a laundry list of everything that is going on in the environment. This section provides the basis for your opportunities and threats sections of your SWOT analysis. As such, it should not mention things about the firm, itself, just things about the firm's environment. Key components of the environment include:
 - Governmental regulation and political climate
 - Markets and customers
 - Suppliers and supply chain
 - Competitors
 - Physical environment (e.g., climate change)
 - Technological changes
 - Social changes (e.g., emphasis on green technologies, changes in demographics, maturing societies, changes in social tastes)

Note that there are several frameworks to use to assist you here. For example, Porter's five forces deal with competitors, customers and suppliers, which are components I listed above. Again, the factors here are endless. Focus on only those issues that are relevant to your problem statement.

- Internal Analysis - This section describes the key features of your firm. It is the background for the strengths and weaknesses section of your SWOT analysis. Major sections include:
 - Financial analysis to include operating performance, cash management, and financial position and, within each one of these,



trends and comparisons to the firm's industry and/or major competitors.

- Corporate culture and structure - this section should be limited unless you can document something that sets your firm apart from others.
- Corporate resources, other than financial - things like specific business processes, well-trained employees, access to raw materials, relationships with customers and suppliers.
- Competitive advantages - this probably should go last because this section compares the issues you identified in describing your firm to its competitors and so it results from the other issues you should discuss in this section.
- SWOT - a very common error in early drafts is raising new points in the SWOT analysis. Beginning with your SWOT, you should not raise any new factual observations about your firm or its environment. The SWOT sections should be short and merely highlight key issues from your internal and external analyses that you will bring together in your TOWS to identify possible strategies. Thus, the SWOT is merely a summary of points you have already made. Again, do not list all the firm's strengths and weaknesses, nor should you list all the threats and opportunities in its environment, just the ones that lead to solution to its problem.

A common error students make in this section is misclassifying items within the SWOT. Threats and opportunities are about the environment, not the firm. Thus, you should really not be mentioning your firm when describing threats and opportunities. Also, strengths and weaknesses are about the firm. You should not refer to the environment here unless you need to do so to make a point about a strength or weakness of the firm.

- Strategy formulation and TOWS - This is where you begin to inject your insights into the paper other than your identification of the problem. The key goal is to identify strategies the firm can use to address their problem and to categorize them within the matrix. This section should include a verbal explanation of every entry in the TOWS cells. By "TOWS cell," I mean the cells that contain your recommended strategies.
- Strategy Recommendation - Pick either a single strategy or small group of strategies and recommend them. As part of the selection process, you should select a few strategies from the cells of your TOWS matrix and evaluate them with a decision matrix. A major error students make in their decision matrices is that they do not support with logical arguments the numbers they enter into the decision matrix. You must support every entry in this matrix with a statement as to how you arrived at that number. However, you can lump items together to avoid being redundant and to shorten your presentation of your decision criteria. When you are finished with this section, however, the reader should understand exactly how you arrived at your assessment for each option.
- Implementation - This should present your recommendations as to how the firm should implement the strategy you have recommended. My preferences are to keep this section short and focused on specific issues that are relevant to the specific strategy you recommended and not present a laundry list of all possible considerations that a text might list. This requires that you really understand what the firm will need to attend to when implementing your strategy above and going beyond general issues like controlling costs and evaluating performance.

Additional Issues

- Above all else, this paper is about demonstrating your ability to do independent analysis, draw conclusions, and make recommendations that provide some additional insights to a problem.
- Cite data - support your points with data. For example, don't just state that your firm is a major player in its industry; cite data like its annual sales compared to the other major players in the industry to support your assertion.
- Always cite the sources of your data. Anytime you make a factual observation about your firm or its environment, cite the source of the data unless you created the fact yourself.
- Draw explicit conclusions, don't just list a bunch of facts and expect the reader to determine what they mean. Again, everything you do should be focused on developing and solving a problem.
- Find objective sources. Too many students rely on the firm's annual report to describe the firm and its activities. This information is highly biased and intended to place your firm in the best possible light. Do a thorough review of the popular business press for books and articles by outsiders on your firm. The library has good online databases for this purpose. Also, the Internet is a rich source of data as well.