Guidelines for Case Preparation, Write-Up and Discussion

Professor Varghese P. George

You should strive to develop the ability to ask "the right questions" about each case. For doing this, it would be useful to take the position of the protagonist in the case. The following questions are likely to be relevant to most cases:

- Who is the protagonist?
- What are his or her (implicit or explicit) objectives? As the protagonist, what (implicit or explicit) decisions must I make?
- What problems, opportunities, and risks do I face?
- What evidence do I have to help make the decision? Is the evidence reliable and unbiased? Can I improve it?
- What alternate courses of action are available? What criteria should I use to judge the alternatives?
- What action should I take? (Be specific.) How should I convince others that my approach is the best? What are the lessons from the case? How do they relate to my own real-life experiences?

The actual outcome of a case should not bias your analysis because the case organization's decision does not validate or invalidate your action plan. I am interested in your ability to think critically, to identify the relevant issues, apply the integrative tools discussed in the course, and persuasively articulate, in a concise manner, an innovative -- but realistic -- recommendation. Attempts to be creative will be rewarded, but they must be reasonable, logical, fully supported (don't assume that I know what you mean) and well-developed (i.e., think through the implications of your recommendation).

Be careful to focus on variables that the managers can control, not on those beyond their control. Innovative plans that show your ability to think through messy problems, but that are anchored in reality, are particularly impressive. Think about what might have prevented management from trying your plan before. Your plan should address process issues and specify how your goals will be achieved. Recommendations about outcome variables (e.g., "improve product quality", "increase market share") are unacceptable. You should clearly state your identification of the key issues and recommendations, but they should not be naive or simplistic. Ask yourself why your plan would be more successful than other obvious or previous plans. In evaluating your analysis of the case, we will consider the following:

- How well and usefully do you define the problems?
- How much of what there is to be observed do you actually see? What issues? What important facts?
- Do you use these observations to draw relevant conclusions? Is any quantitative analysis well constructed and well computed? Does it seek to answer useful questions?
  - Do recommendations follow from conclusions? Are recommendations well buttressed with supporting data and lines of reasoning?
- Do you commit to explicitly stated recommendations and then go on to outline a plan of action?

* References: (1) An introduction to cases, HBS, 9-584-097. (2) Case method teaching, HBS, 9-581-058, Rev. 5/81.