

# WRITING AND REVISING/EDITING THE CASE ANALYSIS

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## I. Writing the Case Analysis (theory in context; analysis leading to recommendations/solutions)

**What is a case analysis?** A report of your analysis of a particular event: a summary of the conditions and details of a particular situation under investigation, the assessment and evaluation of key factors within that situation, and the solution or recommended course of action that follows. Case analysis represents an important form of problem solving for the Business Management community.

**Who uses case analyses?** Students, instructors, managers/members of businesses/ organizations, external consultants/advisors

**When are case analyses used?** Case analyses are used when one wants to arrive at solutions/offer recommendations or courses of action for particular issues, in both actual business settings and educational ones.

**Why (in a scholarly context):** To simulate “real” conditions; to put you in a more active investigative and decision-making role; to give you a chance to apply strategic techniques/tools; to demonstrate, for your instructor and yourself, your understanding of both the case and theories/techniques that will help you identify and offer solutions to problems; to help you develop and hone your management skills

### Assignment details

Just as no two cases will be alike, each case analysis you write will differ depending on what you are assessing, the audience you are producing the analysis for, your overall objectives, and the body of knowledge/applications you are drawing upon to support your investigation and recommendations.

### Purpose:

- To present a viable, comprehensive, and comprehensible response that is based on relevant concepts, theories and techniques
- To reinforce your authority and accountability as a company leader: your reader should see the feasibility of your recommendation and accept your analysis
- To demonstrate, above and beyond your answer to the question posed in the case,
  - your ability to separate the pertinent details of the case from the extraneous or irrelevant ones
  - your understanding and appropriate application of relevant principles/theories in financial management
  - your knowledge of and comfort with the analytical tools you have used

**Situation and format:** Treat this as an analysis that will be sent to the company’s board of directors prior to a meeting. Therefore, aim to present your analysis as a **report**, with

- a **title page**
- clear **headings and subheadings** throughout as needed to guide your reader and track the development of ideas within the case analysis

- an **APA style references list** and **in-text citations** as needed to account for the ideas/theories/data you draw on to support your analysis and recommendation
- **appendices** containing additional charts, calculations, etc. to supplement findings/recommendations in your report

### Sections to consider when drafting your case analysis:

**1) Background Information/Summary:** At the beginning of your case analysis, you will need to summarize what you consider to be key issues, including the significant problem(s) that must be addressed. Rather than presenting a lengthy account of the situation, however, consider what board members will already know about the company, its history, its business practices, concerns, interests and the overall industry. Rather than reporting every detail of the case, summarize key issues and propose a solution/recommendation.

For example:

“There are currently approximately 20 major television manufacturers in the United States; of these, Zenith is the only one that is domestically owned. The competition is fierce, with Thomson (RCA/GE brands) at 22 percent market share, Zenith 12 percent, North American Philips (including Magnavox, Sylvania, Philco and Philips brands) at 11 percent, and Sony at 6 percent. Although the industry is facing record sales volumes, low margins suppress any benefits. In addition to industry maturity, high fixed manufacturing costs (25 percent) make it imperative for the firm to constantly seek new segments, new ways to ‘market’ and new innovations. ..”<sup>1</sup>

**2) Issues:** What is specifically at stake? What are the key issues underlying this case (both accounting and non-accounting)? This is your opportunity to identify, succinctly, the issues that contribute to and/or need to be addressed in deciding on the most appropriate response to the question posed in the case.

For example:

“For the purposes of this report, the issues and opportunities at Zenith have been divided into two parts, specifically immediate and basic. Immediate issues refer to specific problems, challenges or opportunities that Zenith is facing. Basic issues, however, are larger and more generic in nature. For example, an immediate issue for Zenith is the fact that the TV industry is in a maturity stage, the basic issue being that the product (color TV market) is in its decline stage with not the organizational strategy for revitalization...”

**3) Analysis:** In response to each issue you have identified, analyze alternative solutions, and determine a recommendation, supporting your chosen solution with a thoughtful interpretation of data. This involves conducting a financial assessment of aspects of the company, determining which data to include and how to include it, and explaining its role – what is most important for the readers to know if they are to understand your rationale and support your recommendation(s)?

For example:

“The following alternatives have been generated from Zenith’s executive team to address the basic issues previously identified (which in turn will help resolve the immediate issues).

1. Build network with HDTV complementaries
2. Do not invest in independent “Aspect Ratio Study”
3. Support WP7 study
4. Conduct qualitative research to determine target market wants (HDTV Innovators and qualitative research on early adoption)
5. Create strategic marketing plan

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<sup>1</sup> This example, as well as the others that follow, comes from a case analysis, “From Market Driven to Market Driving: An Outlook for Zenith,” written for BUS 430 by Stephanie Martin, Melinda Friesen, and Samantha Krulitski. This sample is available for you to look at in the Abbotsford Writing Centre. Thank you, Stephanie, Melinda, and Samantha, for allowing us to learn from your hard work.

The first alternative suggests building a network with HDTV complementaries, such as programmers and regulators. Zenith would benefit from developing relationships with these 'groups' not only in potentially getting the product to the marketplace quicker but also from the support required for customers to see the value creation. Being a first mover is only advantageous if the product has the support systems in place for the benefits to sell themselves....”

The diagrams, charts, and other graphics that you provide to support your analysis should be identified. Include key numbers and calculations within the body of the report (and this section in particular), and supplemental charts, tables, diagrams, etc., in the appendices.

**4) Conclusion:** what is/are your response(s) to the question(s) posed in the case? Lay this out clearly and succinctly for your readers – and be careful to connect your recommendations to your analysis (your reader wants to clearly see the links between what you've identified in previous sections of this report and your recommended course of action). In this final section, references to appendices and/or broader financial management scholarship may appear.

For example:

“The presence of uncertainty surrounding the HDTV market creates the quest for an industry standard. In order for that standard to be 'realized', issues such as the availability of complementary products, and the compatibility with other products, become critical to the success or failure of the new technology. As a result of the issues identified together with the preferred alternatives, it is suggested that an integrated approach of 'market driving' is required for the new HDTV technology. It is proposed that Zenith's marketing mission should be 'to lead fundamental changes in the evolution of industry conditions by influencing the value creation process at the product, market and/or industry levels....”

#### **Final considerations and reminders:**

- Ensure the relevance and succinctness of the information you present: identify *key* points only
- Be mindful of your position in relation to that of your audience: what would they expect from someone in your position? What are your obligations to them, and the company as a whole?
- Write from the perspective of the person responsible for the decision – NOT as an outside advisor.
- Remember that your thorough understanding of the case and its context (conduct additional research as needed) will be apparent in your fluency with and use of relevant theories, approaches and tools; your well-executed, thorough analysis; and your presentation of additional charts, figures, etc. (appendices) that provide insight into and rationale for your response. Anticipate multiple readings of the case and revisions of your report draft, and set aside substantial time to reflect on the case, to take notes, and to
- Research additional information (scholarly sources or course material).

## **II. Revising/Editing the Case Analysis**

Experienced writers spend the majority of their writing time in revision activities. On the other hand, less experienced writers tend to write one draft and consider their writing and thinking finished, or, if they do revise, they tend to focus on “surface” concerns involving grammar and spelling. Revision is, for experienced writers, about so much more than that. Revising most often involves structural changes to your text, as well as significant rethinking, reworking, reordering, and rewriting of preliminary drafts.

### **Think of revision as working at two important levels: the macro-level and the micro-level.**

At the **macro-level**, you will want to focus your attention on the “big picture” by paying attention to these areas:

1. the structure of your case analysis: does it include background information/summary, issues, analysis and recommendations, conclusion, references (if relevant), and appendixes sections?
  - What are you doing in each of these sections? Do they each serve these distinctive parts of the case analysis? Summarize each section of your case analysis. Do you see clear evidence of summary, issues, analysis and recommendations, and conclusions?

2. your meaning within each section: here you want to check that each of these sections makes sense; that one sentence follows from the next; and that you are using transition words and phrases to emphasize the relationship between sentences and ideas.

The more you revise at the macro-level of your case analysis, the less you will need to revise at the **micro-level**, where you will focus on detail, including these aspects of your writing:

1. shaping your meaning: shaping your meaning involves fine tuning what you wish to say at the sentence-level, your ideas, your reasoning and analysis, making sure what you mean to say is on the page

2. crafting your language: this involves making sure that you are using language that is acceptable to your audience, in this case, a board of directors and your instructor...aim for language that reflects your role as a thoughtful advisor to the board, someone who is responsible for the recommendations you make...use language that is at home in the accounting field, language that reflects concepts you have learned through this course and your academic career.

3. look for mistakes in grammar and usage: this is usually the final step before submitting your case analysis. It helps to read your case analysis aloud to a friend or family member (pets work too!). You may find that it is easier to catch your mistakes when you read your work from the page rather than your head.



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