How to Analyze a Case Study

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Outline
1. Introduction to Analyze a Case Study
2. Case study analysis 5 Steps

Introduction to Analyze a Case Study (1/2)
- A case study helps students learn by immersing them in a real-world business scenario where they can act as problem-solvers and decision-makers.
- Focusing on the most important facts and using this information to determine the opportunities and problems facing that organization.
- Students are then asked to identify alternative courses of action to deal with the problems they identify.

Introduction to Analyze a Case Study (2/2)
- A case study analysis should:
  1. identify key issues and problems
  2. outline and assess alternative courses of action
  3. draw appropriate conclusions
Case study analysis steps

- Identify the **most important facts** surrounding the case
- Identify the **key** issue or issues
- Specify **alternative courses** of action
- Evaluate each course of action
- Recommend the **best** course of action

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[1]. Identify the most important facts surrounding the case

- Read the case several times to become familiar with the information it contains.
- Pay attention to the information in any accompanying exhibits, tables, or figures.
- One can assume the facts and figures in the case are true, but statements, judgments, or decisions made by individuals should be questioned.
- List the most important facts and figures that would help you define the central problem or issue. If key facts and numbers are not available, you can make assumptions, but these assumptions should be reasonable given the situation.
- The “correctness” of your conclusions may depend on the assumptions you make.

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[2]. Identify the key issue or issues (1/6)

- Use the facts provided by the case to identify the key issue or issues facing the company you are studying.
- Identify the most important and separate them from more trivial issues.
- State the major problem or challenge facing the company.
- You should be able to describe the problem or challenge in one or two sentences.
- You should be able to explain how this problem affects the strategy or performance of the organization.

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[2]. Identify the key issue or issues (2/6)

- You will need to explain why the problem occurred. Does the problem or challenge facing the company come from:
  - a changing environment
  - new opportunities
  - a declining market share
  - inefficient internal or external business processes?
- In the case of information systems-related problems, you need to pay special attention to the role of technology as well as the behavior of the organization and its management.
[2]. Identify the key issue or issues (3/6)

- Information system problems in the business world typically present a combination of:
  - Management
  - Technology
  - Organizational issues
- When identifying the key issue or problem, ask what kind of problem it is:
  - Is it a management problem,
  - a technology problem,
  - an organizational problem,
  - or a combination of these?
- What management, organizational and technology factors contributed to the problem?

[2]. Identify the key issue or issues – Management (4/6)

- To determine if a problem stems from management factors
  - Managers are exerting appropriate leadership over the organization and monitoring organizational performance.
  - The nature of management decision-making: Do managers have sufficient information for performing this role, or do they fail to take advantage of the information that is available?

[2]. Identify the key issue or issues – Technology (5/6)

- To determine if a problem stems from technology factors, examine any issues:
  - Arising from the organization's information technology infrastructure: its hardware, software, networks and telecommunications infrastructure, and the management of data in databases or traditional files.
  - Consider also the whether the appropriate management and organizational assets are in place to use this technology effectively.

[2]. Identify the key issue or issues – Organization (6/6)

- To determine the role of organizational factors, examine any issues arising from
  - organization's structure
  - culture
  - business processes
  - work groups divisions among interest groups
  - relationships with other organizations
  - the impact of changes in the organization's external environment-changes in government regulations, economic conditions, or the actions of competitors, customers, and suppliers.
[3]. Specify alternative courses of action (1/2)

- List the courses of action the company can take to solve its problem or meet the challenge it faces.
- For information system-related problems, do these alternatives require a new information system or the modification of an existing system?
- Are new technologies, business processes, organizational structures, or management behavior required?
- What changes to organizational processes would be required by each alternative?
- What management policy would be required to implement each alternative?

[3]. Specify alternative courses of action (2/2)

- Remember, there is a difference between what an organization “should do” and what that organization actually “can do.”
- Some solutions are too expensive or operationally difficult to implement, and you should avoid solutions that are beyond the organization’s resources.
- Identify the constraints that will limit the solutions available. Is each alternative executable given these constraints?

[4]. Evaluate each course of action

- Evaluate each alternative using the facts and issues you identified earlier, given the conditions and information available.
- Identify the costs and benefits of each alternative. Ask yourself “What would be the likely outcome of this course of action?”
- State the risks as well as the rewards associated with each course of action.
- Is your recommendation feasible from a technical, operational, and financial standpoint? Be sure to state any assumptions on which you have based your decision.

[5]. Recommend the best course of action

- State your choice for the best course of action and provide a detailed explanation of why you made this selection.
- You may also want to provide an explanation of why other alternatives were not selected.
- Your final recommendation should:
  - flow logically from the rest of your case analysis
  - clearly specify what assumptions were used to shape your conclusion.

There is often no single “right” answer, and each option is likely to have risks as well as rewards.