

## A NOTE ON CASE ANALYSIS

A case is a reportorial study of an organization under stress. It typically sets forth events over a limited period of time as viewed from the position of a person outside the organisation, the case writer. Good cases are focused upon a major threat or opportunity that faces management and contain enough data about the circumstances to permit the reader to understand and evaluate the situation. Case analysis calls for the reader to evaluate these data and reach an explicit conclusion concerning the actions that ought to be taken and the reasons for these actions.

A case analysis comprises four major components, (i) a specification of the problem being faced, (ii) the delineation of best alternatives available to solve this problem, (iii) an identification (and discussion) of each of the issues which bear upon the choice of alternative, and (iv) a conclusion which deduces the best alternative from facts and discussion in the issues.

### **The Problem**

The problem may be regarded as some barrier facing an organization which blocks, or threatens to block, the achievement of important goals. The key words here are goals and barrier. "Goals" refers to a set of objectives (perhaps only implicitly present in the case) that the management wishes to accomplish. Objectives may include market share, consumer attitude shifts, extension of distribution channel position, sales growth, image, or product positioning.

The barrier refers to a set of conditions that threaten or hinder management from achieving these objectives. It may derive from competitor action, changes in the economic, political, or social environment, or difficulties arising from the absence of adequate coordination among members of the company and/or its channel of distribution.

### **The Alternatives**

The alternatives consist of a set of competing strategies to resolve the problem. They may possess the following components:

1. A statement of strategic goals and aims.
2. A statement of total resources to be applied.
3. A statement of product and/or company market position.
4. A statement of the distribution of these resources into various elements of the marketing mix.

Strategies may be usefully given titles which provide a quick orientation to gestalt of the character of the plan. Such titles could reflect major expansion of market share, retrenchment, or repositioning.

When explaining an alternative, this should be limited to a brief statement of the strategy and its major component elements. Arguments pro or con concerning the plan should NOT be

included or summarized at this point. Such arguments at this point serve only to distract from the clarity and parsimony of the description and usually prove redundant as the same points are raised in other parts of the case discussion.

### **The Issues**

The issue section is the place in the analysis where the various causal forces which affect the generation of alternatives (see previous section) and the choice of the best alternative are set forth and evaluated. Issues may be usefully conceived as explicit questions.

Issues questions may be composed, for example, from the following subject areas:

1. Total market potential/sales and the forces determining these.
2. The strength and direction of competitors and the effectiveness of their marketing strategies.
3. Key areas of differential advantage of the company.
4. Potential responses by consumers to different actions by the company.
5. Potential responses by competitors to company actions.
6. Potential conflicts among members of the company or members of its distribution channel.

### **The Conclusion**

The conclusion synthesizes the answers to the issues, building one upon another to show how one alternative is superior to all others. This could be done wholly through deductive logic. Where financial data are adequate, issues analysis should use them to build quantitative arguments.