Thoughts on How to Write a G-Lab Case Study

Cate Reavis

Writing a G-Lab case is exciting, fun, and a chance for fame. It's also a challenge. Writing a case is unlike most writing you've ever done for a class before.

A case study is a teaching tool that facilitates class discussion about a particular business issue. Some cases highlight the executive decision making process in a business setting. For example, if you were the head of human resources at a technology company and you were trying to improve your company's retention rate, what would you do and how would you do it? Others highlight a decision by a consulting team – such as a G-Lab student team – wrangling with how to manage the consulting project, obtain useful data, and deliver valuable results.

Whether client-based or team-based, cases gives students the chance to be in the shoes of a protagonist and, with the help of detailed data and circumstantial context, analyze what they would do (would have done) or would not do (would not have done) in a particular situation, why and how. They are meant to provoke debate among students. They should not promote a particular point of view, steer students in a particular direction, or answer the questions they raise. Readers should reach their own conclusions.

The practical upshot is that a G-Lab case study resembles a G-Lab class report, but with two major distinctions.

1. It poses the problems and questions, but not the answers.

2. It gives the background – macroeconomic, industry, company, etc. – that a reader needs but a host company already knows.

When Choosing to Write a Case

When thinking about writing a case study, there are three things to keep in mind, and ideally know the answers to, before you start:

1. What type of case do you want to write? Most cases are based around a decision that the protagonist needs to make. The dilemma is spelled out in the introduction, and the various decisions that the protagonist is contemplating, and pros and cons for each, fall toward the end of the case. There is also the demonstration or descriptive case which showcases best practices, not-to-be-repeated practices, or something in between.

2. What type of discussion do you want to generate? What do you want to leave the reader thinking about?

3. Are there sufficient data and comparison data available to conduct a solid analysis of the business/industry or both? Cases are more than just good stories, which is to say that good stories don't necessarily make good cases.

Process

While there are many ways to write a case, the following has proven to be a good way to approach the process of developing a case study.

Step 1 Framing the Case

Determine the objective of the case and write a summary statement. As an example, "The case demonstrates Disney's ability to create multiple streams of revenue from one source of content due to its synergistic culture."

Step 2 Outline

Develop a rough outline in which the who, why, and who are answered:
*   **What:** What is the case about? What are the learning objectives? What do you want to leave the reader thinking about? What is the hook, which is to say what dilemma/decision will keep the reader reading?
*   **Why:** Why is the case being written? Why is it interesting? Does it present best/worst practices? It is a decision-, or description-focused case?
*   **Who:** Who is your audience? What will they already know? What might they need to know to effectively analyze the case?

Step 3 Research and Interviews

As a G-Lab team you have a major advantage in writing a case: you're already collecting data anyway. That said, the single most frequent reason why interesting situations fail to become G-Lab cases is that students don't keep track of their sources. If you can't remember where you found a
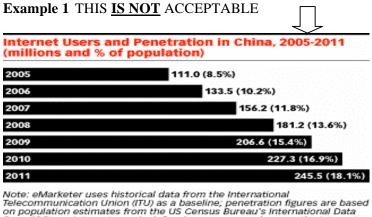
number or who told you a key fact, then the data probably can't go into the case, and the case may fall apart.

Step 4 Organizing Information

Many cases are organized like an hourglass. After an introduction (often specific), cases typically start with broad industry context, narrow into specifics about company/organization, and then broaden out again as the case presents a scenario for analysis.
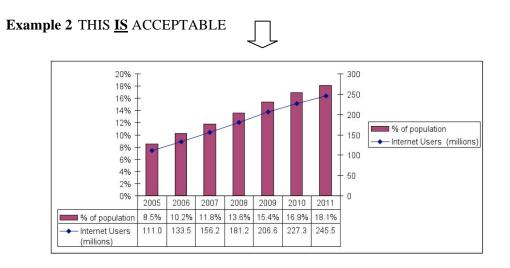
Figuring out how to organize case-related material can be quite intimidating. Deciding what information to include and exclude can be a daunting task. Here are some ideas for how to think about organizing your material:

1. Identify and flesh out key themes/topics that arise from interviews, presentations, and other sources. For example, a pharmaceutical company might be contemplating making a significant strategic shift. Why is this necessary, who says it's necessary, and what data exist that indicate it's necessary?

2. Identify the crucial data points (from financial reports, industry statistics, internal metrics) that support the learning objective(s) of case. Create exhibits or figures that visually depict these points. Timelines and organizational charts can be very useful visuals for laying out the "story."
   - ➢ Remember: Copyrighted materials including graphs, maps, tables, etc. found in books/magazines and/or on the Internet **CANNOT** be scanned/copied and pasted into a case without permission from the copyright holder. You can, however, recreate the graph and use it in a case as long as it is attributed to the copyright holder. If you are unclear about what is and what is not acceptable, please see example below:

Example 1 THIS **IS NOT** ACCEPTABLE

Internet Users and Penetration in China, 2005-2011 (millions and % of population)

Year	
2005	111.0 (8.5%)
2006	133.5 (10.2%)
2007	156.2 (11.8%)
2008	181.2 (13.6%)
2009	206.6 (15.4%)
2010	227.3 (16.9%)
2011	245.5 (18.1%)

Note: eMarketer uses historical data from the International Telecommunication Union (ITU) as a baseline; penetration figures are based on population estimates from the US Census Bureau's International Data Base (IDB); an Internet user is defined as someone who uses the Internet at least once per month
Source: eMarketer, January 2007

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Example 2 THIS **IS** ACCEPTABLE

Source: emarketer, January 2007.

3. Create an outline which has a home for data and themes (see **Step 5**).

Step 5 Creating a Structure

There are many structures a case can take, but when you're first learning or are relatively new to the process, the following structure usually works quite well. Remember, keep it simple:

A. Intro (2-3 paragraphs, summarizing context and problem/decision)
B. Context
C. Company-specific information
D. Problem/Decision
E. What has been/could be done?
F. Conclusion

General Writing Tips

• Cases are written in the **past tense**, and there is a deliberate reason for this. If students in 2008 read a case written in 1997 that states: "The company leads the industry in revenues," the case's validity and applicability is weakened if the company is no longer the industry leader. Cases are written in the past tense in order to give them unlimited shelf life.

• Know your audience. What will they likely know/not know? With this in mind, write the case so that it can be understood and interpreted by readers with various levels of knowledge and command of the English language.

• Broad sweeping generalizations mean nothing if they are not put into **context**. Context is critical. A case without context is not teachable. Students need to be able to compare and contrast. Simply saying, "X company did a good job of retaining its employees" does not give the reader

enough data and nor does a sentence like, "X company did a good job of retaining its employees and had a retention rate of 4%." How does that 4% compare with the company's competitors?

- **Make connections in text** to exhibits and/or appendices so the reader has a clear idea of why they are important. For example:

  As depicted in **Figure 3**, for some diamond producers there was great disparity in the relationship between the volume and value of production. While the Congo and Australia were significant producers on a volume basis, the value of their production was quite low. Angola presented the reverse scenario.
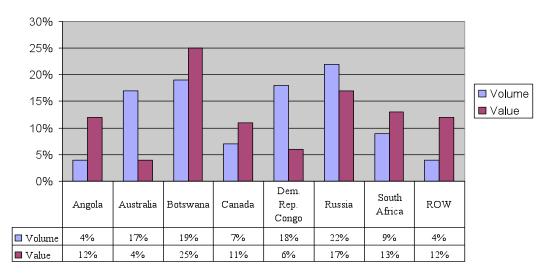
Figure 3Top Diamond Producers by Volume and Value

	Angola	Australia	Botswana	Canada	Dem. Rep. Congo	Russia	South Africa	ROW
☐ Volume	4%	17%	19%	7%	18%	22%	9%	4%
☐ Value	12%	4%	25%	11%	6%	17%	13%	12%

Source: "The Global Gems and Jewelry Industry: Vision 2015; Transforming for Growth, KPMG, December 2006.

- Include **multiple opinions**. If possible and when appropriate, include viewpoints of competitors and/or customers.

- **Stay as objective as possible**. Let readers reach their own conclusions and form their own opinions. Keep in mind that there is no right or wrong answer in a business case study. For example do not write a sentence that goes something like: "The fact that the company was listed on the NASDAQ and bound by corporate governance to act in the best interests of its shareholders reinforced the fact that it allocated its resources to countries that were best able to serve their needs." The sentence should simply read, "The company was listed on the NASDAQ and bound by corporate governance to act in the best interests of its shareholders." The concluding part of the sentence, "..reinforced the fact that it allocated its resources to countries that were best able to serve their needs," is a point that should be inferred by the reader.

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