



## **An Introduction to the Case Study Method**

### *Preparation, Analysis, and Participation*

#### **Introduction**

A case study is a written description of a problem or situation. Unlike other forms of stories and narrations, a case study does not include analysis or conclusions, but only the facts of a story arranged in a chronological sequence. The purpose of a case study is to place participants in the role of decision-makers, asking them to distinguish pertinent from peripheral facts, to identify central alternatives among several issues competing for attention, and to formulate strategies and policy recommendations. The method provides an opportunity to sharpen problem-solving skills and to improve the ability to think and reason rigorously.

Most cases depict real situations. In some instances, the data are disguised and, infrequently, the case may be fictional. Cases are not intended to be comprehensive or exhaustive. Most cases are snap shots of a particular situation within a complex environment.

The focus of a case study is on a main protagonist who is shown at the point of a major decision. Typically, the information presented is only what was available to the protagonist in the real situation on which the case is based. Thus, as in real life, important information is often unavailable or incomplete. Because a case study describes reality, it may be frustrating. “Real life” is ambiguous, and cases reflect that reality. A “right” answer or “correct solution” is rarely apparent. This educational method is useful whenever decision-making must be derived primarily from skillful analysis, choice, and persuasion. The case study method actively engages the participant in these processes: first, in the analysis of the facts and details of the case itself; second, in the selection of a strategy; and third, in the refinement and defense of the chosen strategy in the discussion group and during class. The case method does not provide a set of solutions, but rather refines the student’s ability to ask the appropriate questions and to make decisions based upon his or her answers to those questions.

#### **Preparation**

The case study method is demanding and requires significant preparation time and active class participation. It is intended to build on experiences of class members and to allow them to learn from one another as well as from the materials and from faculty members. Differences in analysis among participants and faculty members typically arise, and conflicting

recommendations emerge as participants with varied perspectives, experiences and professional responsibilities consider the case.

Preparation of a case for class discussion varies with the background, concerns, and natural interests of participants. In general, it is helpful to follow these steps:

1. Skim the text quickly to establish the broad issues of the case and the types of information presented for analysis.
2. Reread the case very carefully, underlining key facts as you go.
3. Note on scratch paper the key problems. Then go through the case again and sort out the relevant considerations and decisions for each problem area.
4. Prioritize these problems and alternatives.
5. Develop a set of recommendations to address these problems.
6. Evaluate your decisions.

## **Participation**

Much of the richness of the case study method comes from class discussion of the cases. The differences which emerge through discussion add richness and dimension to consideration of the issues. It is often helpful to meet with a small number of participants before class to review data, compare analyses, and discuss strategies. This is the time to test and refine your choice of strategies, and to explore and enrich your understanding of the issues in the case through the perspectives of others.

The faculty member's role is to involve many participants in presenting and defending their analyses and recommendations. The faculty member moderates discussion, calling on participants, guiding the discussion, asking questions, and synthesizing comments. Discussion is intended to develop and test the nature and implications of alternate solutions.

The success of a case study class depends largely on your active and vigorous participation.

Remember to:

1. Assert your ideas and prepare to support them.
2. Listen to others and evaluate their positions.
3. Keep an open mind and be willing to change it with new insights or evidence.
4. Make a decision; avoid equivocating.
5. Enjoy yourself.

## **General Notes on Case Studies**

*A case should seem difficult.* If a case seems difficult, it is invariably because the student is thinking and has recognized a need for additional information. There is no such thing as a state of perfect knowledge and all decisions are made under varying degrees of uncertainty. It is just as important to know what information is missing, and its relative importance, as it is to be able to decide upon a course of action.

***All cases are not meant to be alike.*** All cases do not require identical emphasis. Many students who enjoy case analysis in one discipline, may be frustrated by cases in another field. In certain disciplines, problem identification and definition alone may be emphasized because of the nature of the discipline; in other fields problems may be elusive but solutions relatively obvious. Development of alternatives may be emphasized to a greater degree in certain other cases.

***Cases offer multiple perspectives.*** Although a case is traditionally written from the viewpoint of a main protagonist, each case includes a variety of characters with major and minor roles. It is often equally productive to analyze those characters' perspectives, problems, challenges, and opportunities.

***Half of the value is in the discussion.*** Although much can be derived from simply reading cases, much of the true benefit of cases comes from discussion. The case method allows participants to learn from one another as well as from the materials and faculty members. It allows for a sharing of varied perspectives and values in a nonthreatening discussion format not ordinarily found in non-classroom settings.

***Case discussions vary.*** No two class discussions of a case are the same. Professors who teach cases often can attest to the variety of possible outcomes inherent in any case discussion. New students bring new insights, which make case teaching as educational for the professor as for the students.