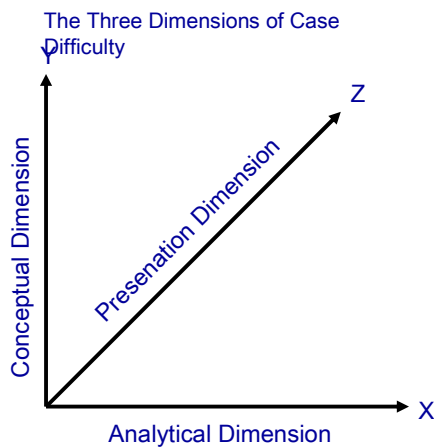


Learning with Cases

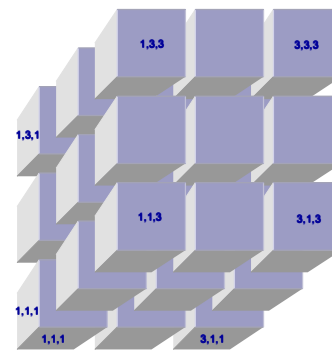
Maufefette-Leenders, L. A., Erskine, J. A. and Leenders, M. R., 1999. *Learning with cases*, Richard Ivey School of Business, The University of Western Ontario, Ontario.

The case difficulty cube

Situation => Problem (3) => Decision/ Solution (2) => Judgement/ Justification (1)



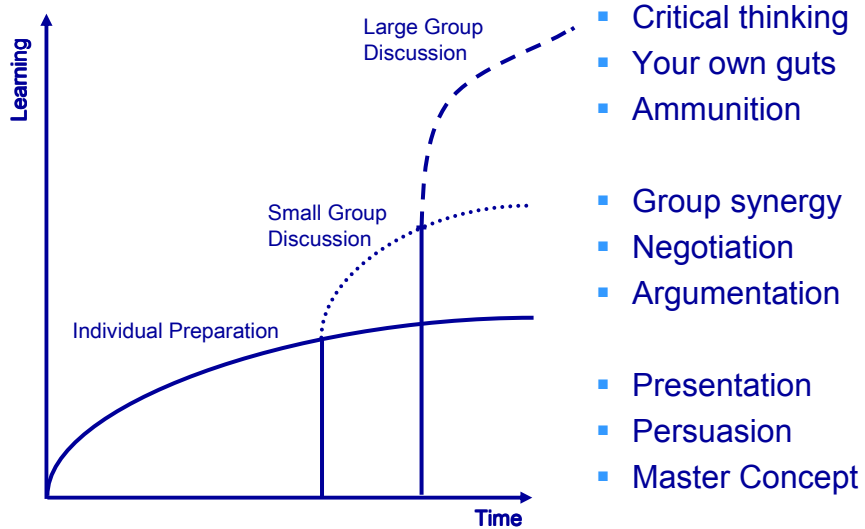
The Case Difficulty Cube



Axis	Dimension	Degree
X	Analytical	1-3
Y	Conceptual	1-3
Z	Presentation	1-3



Case Learning process



3



Individual preparation – The short cycle

Purpose	Get a good feel or size up for the case
Step 1	Read opening and ending paragraphs
Step 2	Who? What? Why? When? How?
Step 3	Quick look at the case exhibits
Step 4	Quick review of case subtitles
Step 5	Read assignment questions

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Individual preparation – The Long Cycle

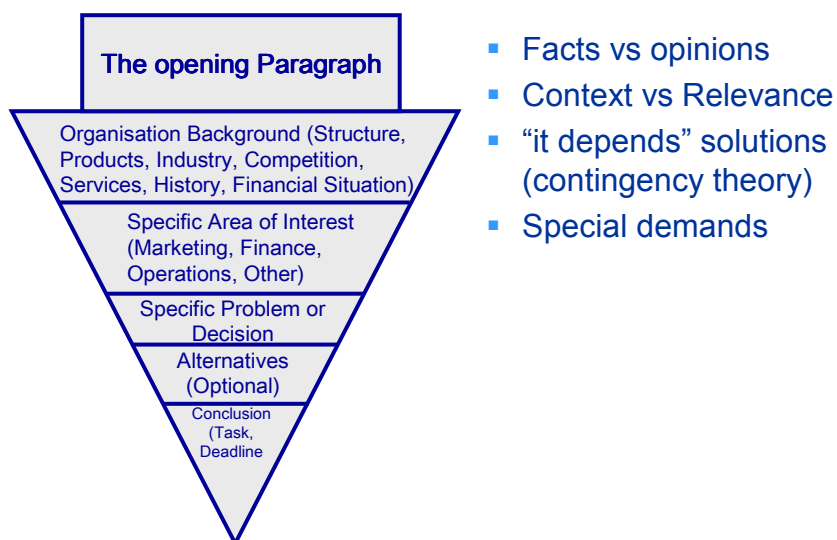
Purpose	Analyse and solve the case
Part 1	Read the case
Part 2	Apply the case solving process
Step A	Define the issue
Step B	Analyse the case data
Step C	General alternatives
Step D	Select decision criteria
Step E	Analyse and evaluate alternatives
Step F	Develop an action and implementation plan
Step G	



Examples

Defining the issue	<ul style="list-style-type: none">▪ Stating problems and questions concerning task understanding▪ Defining scope of task▪ Idea generation (brain storming)
Gathering information	<ul style="list-style-type: none">▪ Statistical data upload▪ Sharing of articles▪ Making assumptions
Analysing information	<ul style="list-style-type: none">▪ Prioritising information▪ SWOT▪ Cause analysis▪ Qualitative and quantitative analysis of case data

Formulating solutions	<ul style="list-style-type: none"> ▪ Taking a decision ▪ Implementation details ▪ Draft versions of individual sections
Formulating justifications	<ul style="list-style-type: none"> ▪ Reference to a similar case ▪ Applying theories and models ▪ Reference to contextual conditions
<i>Managing group work</i>	<ul style="list-style-type: none"> ▪ <i>Task allocation and deadlines</i> ▪ <i>Meeting times</i> ▪ <i>Document layout and number of pages</i> ▪ <i>Explaining usage of PPT or digital library</i>





Case preparation chart 1

Case Title

I. SHORT CYCLE PROCESS

Name Position

Who:

Issue(s)

What:

Why:

When:

How: (_____, _____, _____)

Analytical, Conceptual, Presentation

- Decision makers & responsibilities
- Issues & Significance
- Reasons
- History / Trends

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Case preparation chart 2

II. Long Cycle Process

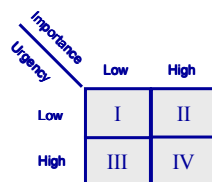
A. Issue(s)

Immediate

- 1.
- 2.
- 3.

Basic

- 1.
- 2.
- 3.



B. Case Data Analysis



- Specific vs general decisions
- e.g. limited time frame
- e.g. Make of Buy
- Eisenhower “about the priority of case issues”
 - I Forget
 - “II Postpone / III Delegate”
 - IV Do it
- Cause Effect Diagram: Analysing & Sharing Views

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Case preparation chart 3

II. Long Cycle Process (continued)

C. Alternative Generation

- 1.
- 2.
- 3.

D. Decision Criteria

- 1.
- 2.
- 3.

E. Alternative Assessment

Quantitative	+		N		-	
Qualitative	+	N -	+	N -	+	N -
Decision	Go	Go ?	? No	No	? No	No

- Creativity
- Theories & concepts from readings
- Likelihood of events vs uncertainty of outcomes
- Assessment measures
 - Quantitative
e.g. profit, cost, ROI, inventory turn, risk
 - Qualitative
competitive advantage, employee morale, ethics, flexibility, motivation



Case preparation chart 4

F. Preferred Alternative

Predicted outcome

G. Action & Implementation Plan

Who
What
When
Where
How

Timing
Milestones

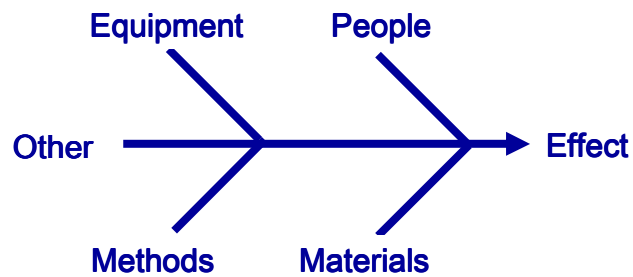
Missing Information

Assumptions

- Rarely only one sensible course of action
- Multiplicity of objectives and actions require consistent argumentation
- Action (& Contingency) Plan



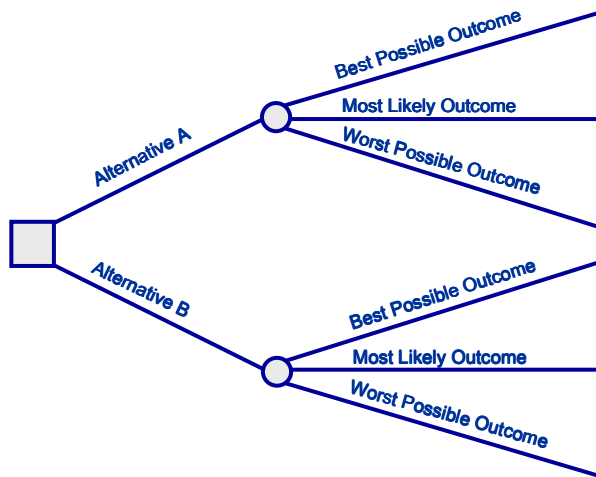
Tools: Cause – Effect – Diagram (2.b)



Tools: List of common decision criteria (2.c)

Quantitative	Qualitative
Profit	Competitive advantage
Cost	Customer satisfaction
Return of investment	Employee morale
Market share	Corporate image
Capacity	Ease of implementation
Delivery time	Synergy
Risk	Ethics
Cash flow	Flexibility
Inventory turn	Safety
Productivity	Visual appeal
Staff turnover	Obsolescence
Quality	Cultural sensitivity
Growth rate	Motivation
Quantity	Goodwill

Tools: Decision Tree diagram (2.d)



Tools: Alternative Analysis Matrix (2.f)

Alternatives	Decision Criteria			
	Cost	Time	Ease of Implementation	Customer Satisfaction
1.				
2.				
3.				
4.				



Missing Information and Assumptions 1

- If you think you need more information, be prepared to answer the following five questions
 1. What information do I really need to have?
 2. Why do I think it is critical to have this information?
 3. Where do I think this information is located? Who has it?
 4. How much time and money will it take to produce it?
 5. If provided, what difference will it make to my decision?



Missing Information and Assumptions 2

- Types of assumptions p.56:
 - Context (interpret case context reasonably)
 - Normal state of affairs (avoid creating “special circumstances”)
 - Decision criteria (decisions based on non-stated circumstances must be clearly identified, e.g. 3 year payback period)
 - “If A then B” assumptions (How do you know?, consider “If A than not B”)
 - The “perfect person” (e.g. hire the perfect consultant)



Effective individual preparation

- Do not read the case over and over again, have a road map and use the “short cycle approach”
- Manage your time to avoid interruptions
- Set time limits – no analysis gets ever “complete”
- Additional reading before case readings