



CASE ANALYSIS WORKSHEET

Now that you've completed the Case Companion, use this worksheet to analyze cases assigned by your instructor. Feel free to refer to the Case Companion for additional tips and strategies to help you.

Understand the Situation

- **Look at the big picture.** Try to figure out what's really going on.
- **Keep asking why.** There's rarely one root cause.
- **Weigh multiple options.** There are many ways to solve a business problem.

What's the situation in the case you're working on?

Identify the case's key players. What are their perspectives about the situation?

Identify the Evidence

List the key evidence that helps you understand the case.

- **Ask why information is included in the case.** It's there for a reason.
- **Tie it back to the classroom.** What themes does your instructor want you to focus on?
- **Pay attention to details.** Dig deeper if something feels contradictory or unexpected.

IDENTIFY THE EVIDENCE

Examples of categories might be:

- Financial issues
- Market context
- Performance problems
- Team or organizational behavior

Now identify 2–3 categories to sort your evidence into and list each piece of evidence you found in its appropriate category.

Interpret Exhibits

Identify the exhibits that tell you something valuable about the case. List at least one important finding from each of these exhibits.

- **Identify the point.** Why was this exhibit included in the case?
- **Connect it to your course.** How does the exhibit relate to class topics?
- **Consider trends or patterns.** They can appear in a single exhibit or across exhibits.

Apply Concepts

- **Start small.** Take one concept from class and apply it to the case.
- **Consider cause and effect.** What you're learning in class could help you figure out what's going on.
- **Take it apart.** Frameworks can help you break the case down in a structured way.

What concept or theory have you learned in class that's relevant to the case?

How can you apply this theory to your analysis?

Reach a Conclusion

- **Support your conclusion.** Show your work and explain how you got there.
- **Consider other viewpoints.** Is there another side to the argument?
- **Think like your instructor.** Anticipate their follow-up questions.

How would you approach the situation?

What factors or criteria did you use to reach your conclusion?

Identify alternative approaches. How would you argue for these other options?