

Case Analysis Workshop

Make Your Case

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- What is Case?
- The BS Case Method
- How to approach a 5-hour case?

Components of a case

- Introduction and setting the stage
- Industry Information
- Company Information
- Problems/ Dilemma
- Decision Point
- Exhibits

Potential Topics

- Accounting
- Business Ethics
- Business & Government Relations
- Economics
- Entrepreneurship
- Finance
- General Management
- Human Resource Management
- Information Technology
- International Business
- Marketing
- Operations Management
- Organizational Behavior
- Strategy

What is Case?

____ Your Role ____

Client's Situation

ADDRESS CHALLENGES

Client's Objectives

Apply conceptual knowledge to real-life business scenarios

What is Case?

Users of Cases

Academic Institutions

Harvard Business School
Ivey School of Business

Financial Institutions

JP Morgan
Morgan Stanley
Barclays Capital

Consultancies

McKinsey
Bain
Boston Consulting Group

Case Formats

Written Case

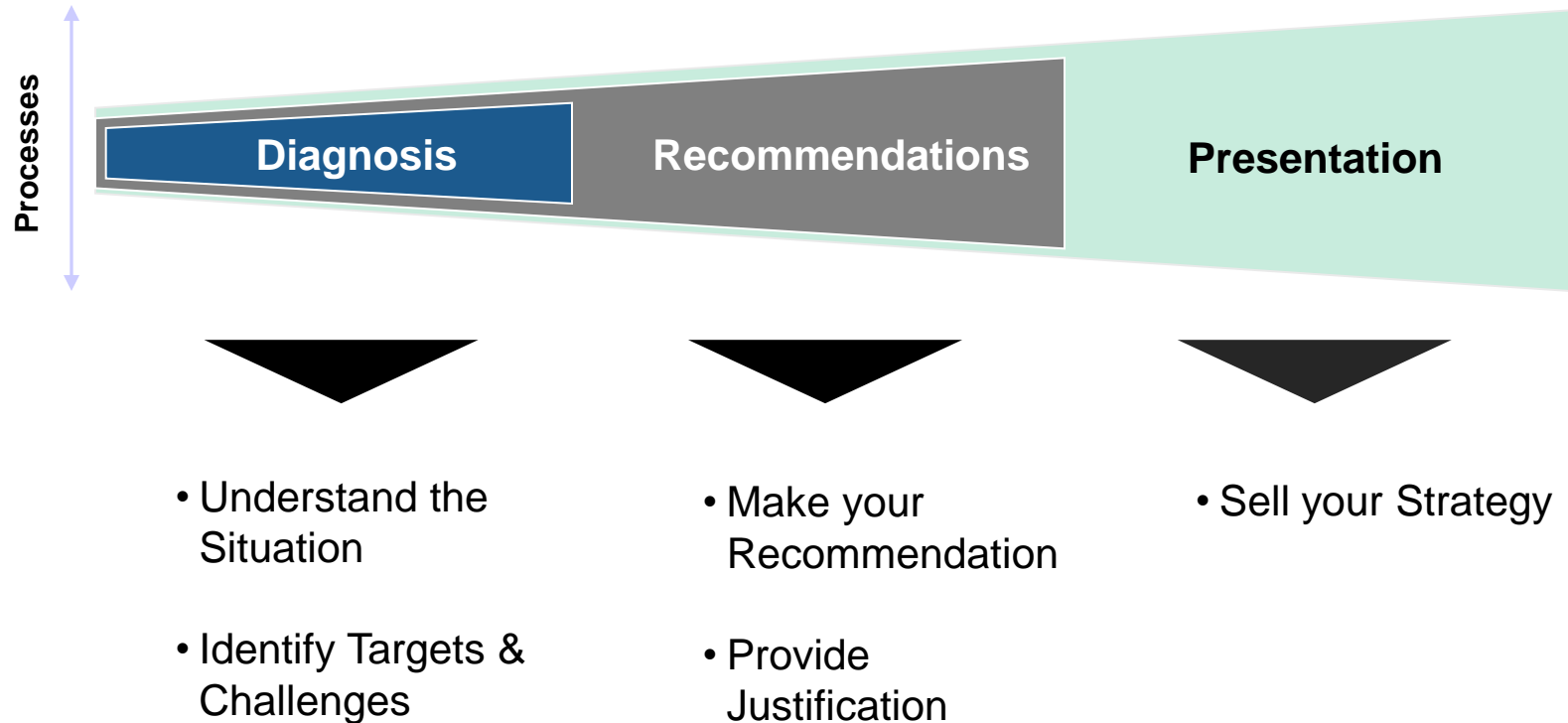
Today's Focus

Verbal Walkthrough


Interview setting only
Question and answer style

Emphasis on **logical** thought process

General Approach



The Business Solutions Approach

- 
- 1 Understand the Situation
 - 2 Identify Issues and Targets
 - 3 Make Recommendations
 - 4 Justify selection
 - 5 Implementation

1. Understand the Situation

Situation Analysis



Characteristics of Industry

- Seasonal? Cyclical?
- Emerging? Mature? Sunset?
- High fixed costs? High variable costs?

Industry Drivers

- Consumer driven? Business client driven? Government driven?

1. Understand the Situation

Situation Analysis

Industry

Company

Environment

Company Position

- Market leader? Biggest loser? Market challenger?

Business Model

- Integrated model? Leverage on outsourcing?

Value Proposition

1. Understand the Situation

Situation Analysis

Industry

Company

Environment

General Economic Conditions

- Boom? Recession? Uncertainty?
- Condition of geographic markets. High-growth? Saturated?

Environmental Considerations

- Is industry beneficial or harmful to environment? Growing concerns?

1. Understand the Situation

Situation Analysis

Industry

Company

Environment

Frameworks you can consider:

- PESTLE Analysis
- Internal and External Analysis
- SWOT Analysis
- Value Chain Analysis
- Porter's Five Forces Analysis

2. Identify the **Targets** & **Challenges**

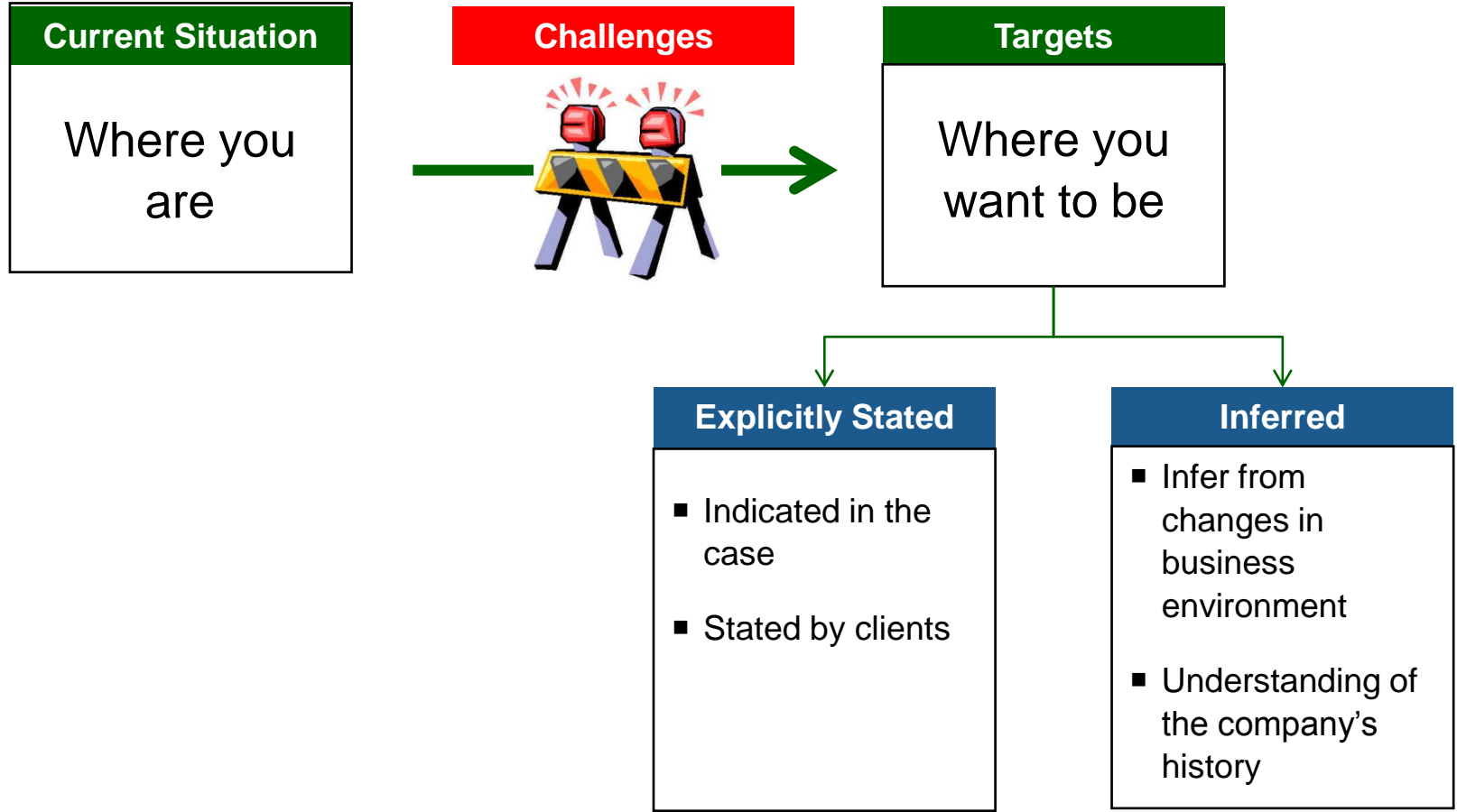
Current Situation

Where you
are

Targets

Where you
want to be

2. Identify the Targets & Challenges



2. Identify the **Targets** & **Challenges**

Common Targets

- Financial Goals
 - NPV
 - Valuation
 - Revenues
- Control
- Social Mission
- Owner's Interests
- Strategic National Interest
- Political Interests
- Stakeholders' Interests

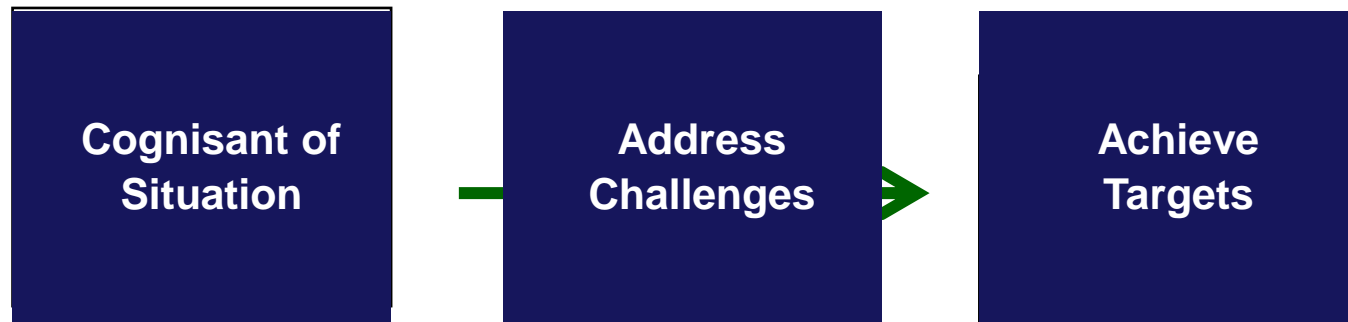


Your Role

Identify and
prioritize the most
pertinent target(s)

3. Make your Recommendation

_____ A good recommendation should: _____



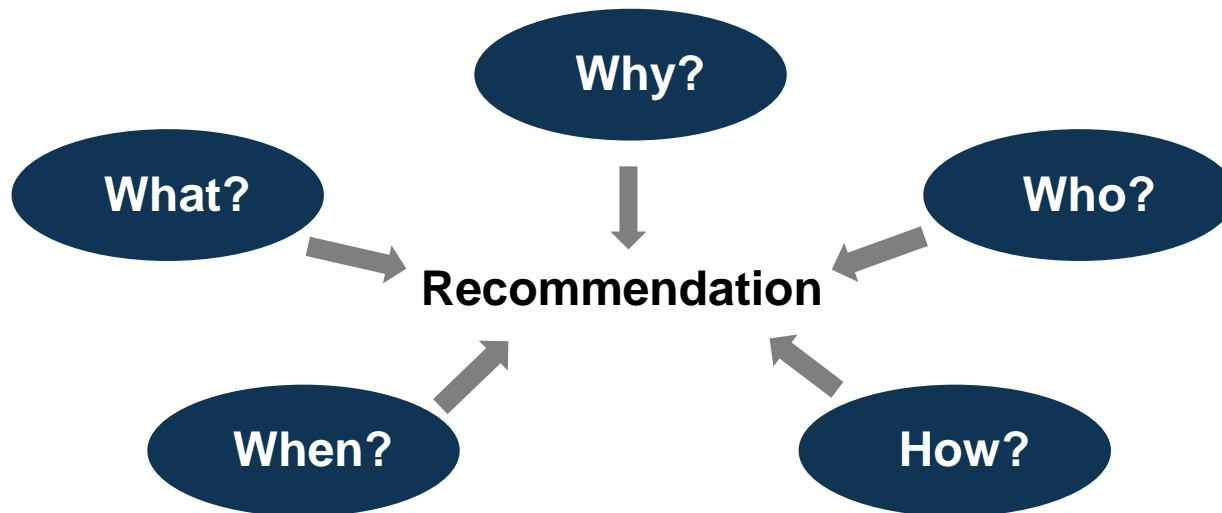
- Strategic orientation
- Include details

3. Make your Recommendation

Why the need for specific details?

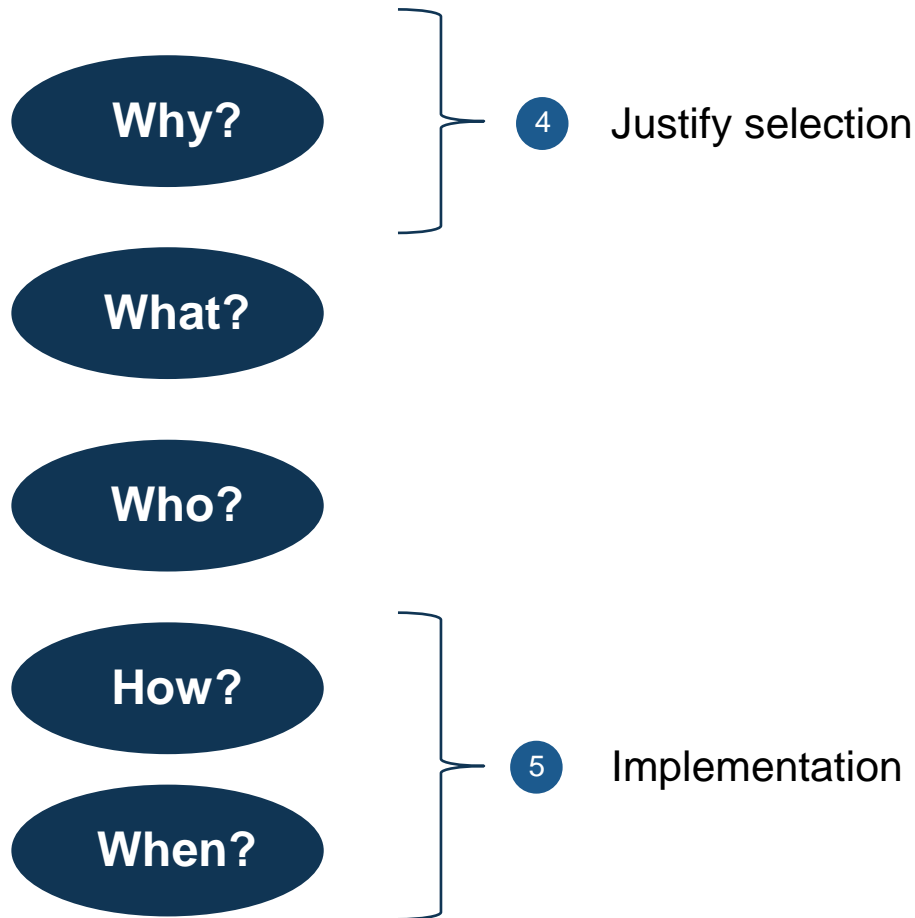
- Proves that proposed strategy is workable
- Provides a blue print for implementation
- Shows that adequate research has been done

What to include?



3. Make your Recommendation

Overlaps in the logical flow



3. Make your Recommendation

Why the need for specific details?

Justify why this is THE recommendation

Why?

What?

Who?

How?

When?

4

Justify selection

Purpose

Provide evidence/explanation to support recommendation

4. Justify Selection

General ways of justifying recommendations

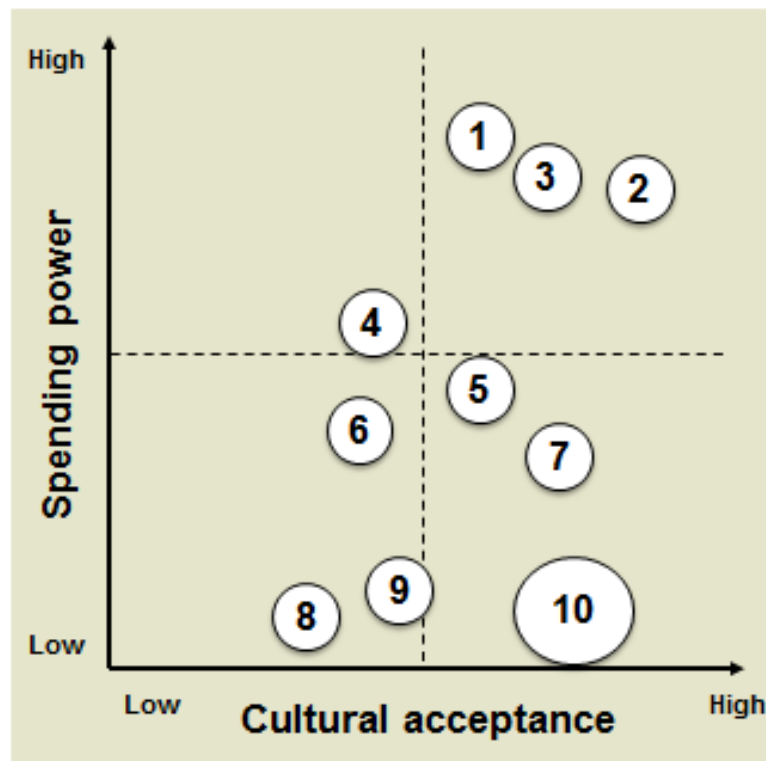
Alternatives Analysis

Evidence

4. Justify Selection

Alternatives Evaluation

Examples of Evaluation Models



- 1 London
- 2 Tokyo
- 3 Singapore
- 4 Dubai
- 5 Macau
- 6 Sydney
- 7 Shanghai
- 8 Mumbai
- 9 Rio De Janeiro
- 10 Kuala Lumpur

4. Justify Selection

Alternatives Evaluation

















































Examples of Evaluation Models

| Criteria | Weight | Tulane | Large Uni | Private Uni | Consulting Firm |
|-----------------------|--------|--------|-----------|-------------|-----------------|
| Resource Requirements | 0.20 | 6 | 8 (6) | 7 | 6 |
| Capability Know-how | 0.25 | 4 | 4 | 8 | 7 |
| Client's Demands | 0.10 | 8 | 1 (6) | 3 | 4 |
| ST Lucrativeness | 0.15 | 8 | 2 (10) | 6 | 5 |
| LT Profit Potential | 0.20 | 9 | 7 | 10 | 7 |
| Spill-Over Benefits | 0.10 | 8 | 8 | 1 | 6 |
| Overall | 1.00 | 6.8 | 5.2 (6.5) | 6.7 | 6.1 |

4. Justify Selection

Alternatives Evaluation

Examples of Evaluation Models

| | Alternatives | Market Attractiveness | | Est. Success Rate | | Complementary | |
|---|---------------------------------------|---|---|---|---|---|---|
| | | Market Size | Competition | Market Knowledge | R&D Risk | Advanced Technology | Premium Image |
| 1 | Carbon-based components |  |  |  |  |  |  |
| 2 | Electronic gear derailleurs |  |  |  |  |  |  |
| 3 | Entry-level components |  |  |  |  |  |  |
| 4 | High-end components in China |  |  |  |  |  |  |
| 5 | High-end components in India |  |  |  |  |  |  |
| 6 | Economical components in China |  |  |  |  |  |  |
| 7 | Economical components in India |  |  |  |  |  |  |
| 8 | Concept stores through Joint-Ventures |  |  |  |  |  |  |



3. Make your Recommendation

Why the need for specific details?

Explain what the recommendation achieves

Why?

What?

Who?

How?

When?

Purpose

Describe what the recommendation involves
&
What the benefits are

3. Make your Recommendation

Why the need for specific details?

Identify stakeholders

Why?

What?

Who?

How?

When?

Purpose

Who are the clients? Who should we partner?
Who should we collaborate with?

3. Make your Recommendation

Why the need for specific details?

Describe implementation details

Why?

What?

Who?

How?

When?

Purpose

Proves that recommendation is feasible and workable

5

Implementation

3. Make your Recommendation

Why the need for specific details?

Provide milestones & implementation timeline

Why?

What?

Who?

How?

When?

Purpose

- Allows clients to gauge their progress
- Describes what to execute first

5

Implementation

5. Implementation

Why the need for specific details?

Provide milestones & implementation timeline

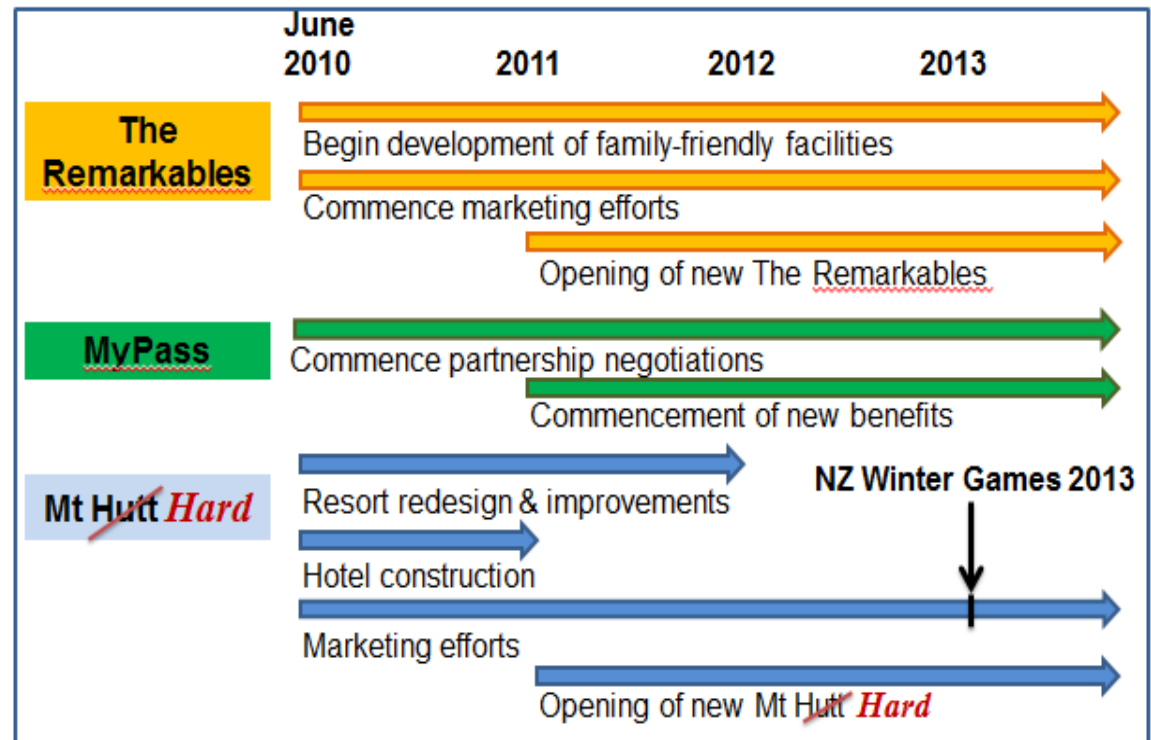
Why?

What?

Who?

How?

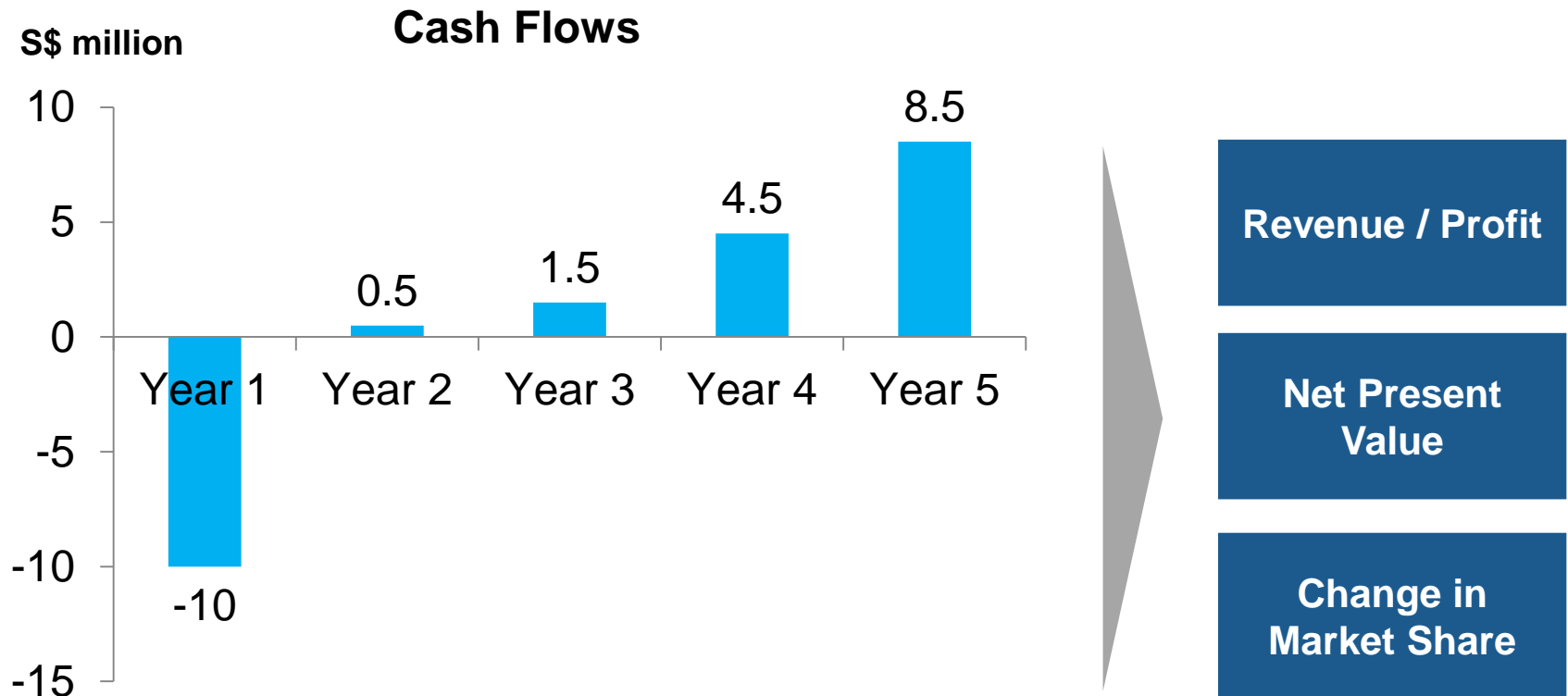
When?



5. Implementation

Money Talks

How much money will your strategy make?

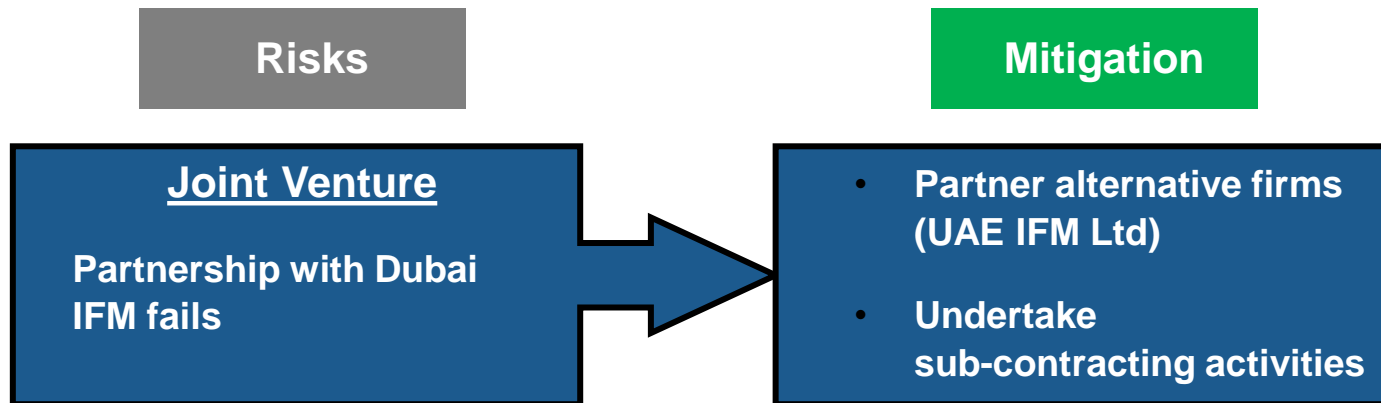


5. Implementation

Risk Mitigation

Risks are inevitable BUT can be managed

1. What are the risks of your recommendation?
2. How can they be mitigated?



Sales Speech

Your Proposal

CONVINCE AUDIENCE

Seal the Deal

Know Your Audience

- Interviewer?
- Judges?
- Project manager?
- Management? Owners?

Structure & Package

Structure

- Direct vs Indirect
- Lead the audience on

Package

- You vs We attitude
- Choice of words

Connect

Demonstrate:

- Understanding of *business model*
- Understanding of *values*
- Understanding of *audience's position*

How to approach the 5-hour case?

Suggested roles in the team



Numbers



Recommendations



Architect



Researcher

Suggested timeline for the five hours

| | 1 | | 2 | | 3 | 4 | 5 |
|----------|-----------|---------------------------------------|--------------------------|-----------------------|---|-----------------------|---|
| Member 1 | Read Case | Discuss Situation Target & Issues | Agree on Recommendations | Recommendation 1 | | Rehearse and Touch up | |
| Member 2 | | | | Recommendation 2 | | | |
| Member 3 | | Situation Analysis / Recommendation 3 | | | | | |
| Member 4 | | Preliminary Research | | Research / Financials | | | |

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