

What Is a Case Study?

A case study is a detailed account of a company, industry, person, or project over a given amount of time. The content within a case study may include information about company objectives, strategies, challenges, results, recommendations, and more. A business school case study may be brief or extensive, and may range from two pages to 30 pages or more.

Why Case Studies?

Business Schools use case studies to teach students how to assess business situations and make decisions based upon those assessments. At top notch Business Schools students may work with as many as 800 case studies during a two-year MBA program.

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SWOT ANALYSIS: STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

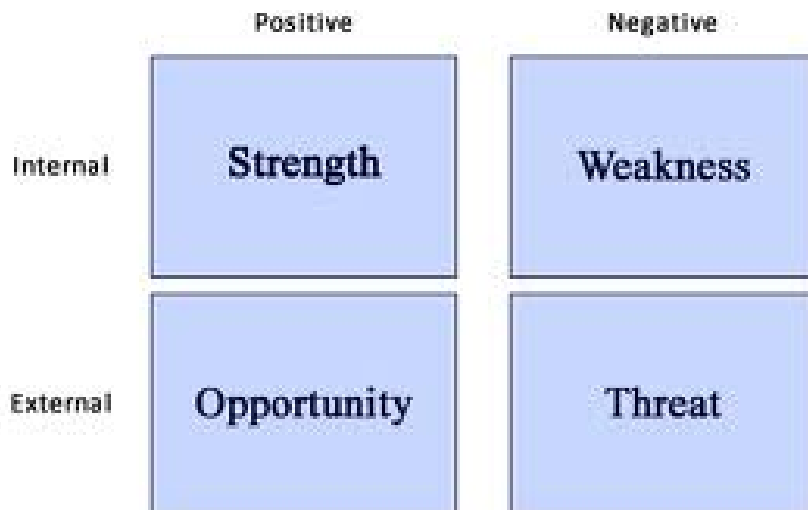
That's where SWOT analysis comes in. SWOT can help you handle both ordinary and unusual situations in your community health or development initiative, by giving you a tool to explore both internal and external factors that may influence your work.

Opposition is an inevitable part of change and one that can significantly impact your community organizing. However, if you know how to take stock of the opposition inside and outside of your effort or group, you are more likely to plan and act effectively.

WHAT IS A SWOT ANALYSIS AND WHY SHOULD YOU USE ONE?

The name says it: Strength, Weakness, Opportunity, Threat. A SWOT analysis guides you to identify the positives and negatives inside your organization (S-W) and outside of it, in the external environment (O-T). Developing a full awareness of your situation can help with both strategic planning and decision-making.

The SWOT method (which is sometimes called TOWS) was originally developed for business and industry, but it is equally useful in the work of community health and development, education, and even personal growth.



SWOT is not the only assessment technique you can use, but is one with a long track record of effectiveness. The strengths of this method are its simplicity and application to a variety of levels of operation.

WHEN DO YOU USE SWOT?

A SWOT analysis can offer helpful perspectives at any stage of an effort. You might use it to:

- Explore possibilities for new efforts or solutions to problems.
- Make decisions about the best path for your initiative. Identifying your opportunities for success in context of threats to success can clarify directions and choices.
- Determine where change is possible. If you are at a juncture or turning point, an inventory of your strengths and weaknesses can reveal priorities as well as possibilities.
- Adjust and refine plans mid-course. A new opportunity might open wider avenues, while a new threat could close a path that once existed.

SWOT also offers a simple way of communicating about your initiative or program and an excellent way to organize information you've gathered from studies or surveys.

WHAT ARE THE ELEMENTS OF A SWOT ANALYSIS?

A SWOT analysis focuses on the four elements of the acronym, but the graphic format you use varies depending on the depth and complexity of your effort.

Remember that the purpose of performing a SWOT is to reveal positive forces that work together and potential problems that need to be addressed or at least recognized. Before you conduct a SWOT session, decide what format or layout you will use to communicate these issues most clearly for you.

We will discuss the process of creating the analysis below, but first here are a few sample layouts-ideas of what your SWOT analysis can look like.

You can list internal and external opposites side by side. Ask participants to answer these simple questions: what are the strengths and weaknesses of your group, community, or effort, and what are the opportunities and threats facing it?

Internal		External	
Strengths	Weaknesses	Opportunities	Threats

Or if a looser structure helps you brainstorm, you can group positives and negatives to think broadly about your organization and its external environment.

<u>Positives</u>	<u>Negatives</u>
strengths	weaknesses
assets	limitations
resources	restrictions
opportunities	threats
prospects	challenges

And here's a third option for structuring your SWOT analysis that might be appropriate for a large initiative that requires detailed planning or many alternatives. This more elaborate "TOWS Matrix" is adapted from Fred David's Strategic Management text. Here a working table guides you to identify strategies by matching items in each quadrant.

	STRENGTHS 1 2 3 4	WEAKNESSES 1 2 3 4
OPPORTUNITIES 1 2 3 4	Opportunity-Strength (OS) Strategies Use strengths to take advantage of opportunities 1 2	Opportunity-Weakness (OW) Strategies Overcome weaknesses by taking advantage of opportunities 1 2
THREATS 1 2 3 4	Threat-Strength (TS) Strategies Use strengths to avoid threats 1 2	Threat-Weakness (TW) Strategies Minimize weaknesses and avoid threats 1 2

David gives an example for Campbell Soup Company that stresses financial goals, but it also illustrates how you can pair the items within a SWOT grid to develop strategies. (This version of the chart is abbreviated.)

	STRENGTHS	WEAKNESSES
	1. Current profit ratio increased	1. Legal suits not resolved
	2. Employee morale high	2. Plant capacity has fallen
	3. Market share has increased	3. Lack of strategic management system
OPPORTUNITIES	Opportunity-Strength (OS) Strategies	Opportunity-Weakness (OW) Strategies
1. Western European unification	Acquire food company in Europe (S1, S3, O1)	Develop new Pepperidge Farn products (W1, O2, O3)
2. Rising health consciousness in selecting foods	Develop new healthy soups (S2, O2)	
3. Demand for soups increasing annually		
THREATS	Threat-Strength (TS) Strategies	Threat-Weakness (TW) Strategies
1. Low value of dollar	Develop new biodegradable soup containers (S1, T2)	Close unprofitable European operations (W3, T1)
2. Tin cans are not biodegradable		

	STRENGTHS 1. Current profit ratio increased 2. Employee morale high 3. Market share has increased	WEAKNESSES 1. Legal suits not resolved 2. Plant capacity has fallen 3. Lack of strategic management system
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THREATS 1. Low value of dollar 2. Tin cans are not biodegradable	Threat-Strength (TS) Strategies Develop new biodegradable soup containers (S1, T2)	Threat-Weakness (TW) Strategies Close unprofitable European operations (W3, T1)

This example also illustrates how threats can become opportunities (and vice versa). The limitation of tin cans (which aren't biodegradable) creates an opportunity for leadership in developing biodegradable containers. There are several formats you can use to do a SWOT analysis, but whatever format you use, don't be surprised if your strengths and weaknesses don't precisely match up to your opportunities and threats. You might need to refine, or you might need to simply look at the facts longer, or from a different angle. Your chart, list or table will certainly reveal patterns.

LISTING YOUR INTERNAL FACTORS: STRENGTHS AND WEAKNESSES (S, W)

Internal factors include your resources and experiences. General areas to consider are:

- Human resources - staff, volunteers, board members, target population
- Physical resources - your location, building, equipment (Does your building have a prime location? Does it need renovations?)
- Financial - grants, funding agencies, other sources of income
- Activities and processes - programs you run, systems you employ
- Past experiences - building blocks for learning and success, your reputation in the community

Don't be too modest when listing your strengths. If you're having difficulty naming them, start by simply listing your characteristics (e.g., we're small, we're connected to the neighborhood). Some of these will probably be strengths.

Although the strengths and weakness of your organization are your internal qualities, don't overlook the perspective of people outside your group. Identify strengths and weaknesses from both your own point of view and that of others--those you serve or deal with. Do others see problems--or assets--that you don't?

How do you get information about how outsiders perceive your strengths and weaknesses? You may know already if you've listened to those you serve. If not, this might be the time to gather that type of information. See "Related Sections" for ideas on conducting focus groups, user surveys, listening sessions, and meetings.

LISTING EXTERNAL FACTORS: OPPORTUNITIES AND THREATS (O, T)

Cast a wide net for the external part of the assessment. No organization, group, program, or neighborhood is immune to outside events and forces. Consider your connectedness, for better and worse, as you compile this part of your SWOT list.

Forces and facts that your group does not control include:

- Future trends - in your field (Is research finding new treatments?) or the culture (Do current movies highlight your cause?)
- The economy - local, national, or international
- Funding sources - foundations, donors, legislatures
- Demographics - changes in the age, race, gender, culture of those you serve or in your area
- The physical environment (Is your building in a growing part of town? Is the bus company cutting routes?)
- Legislation (Do new federal requirements make your job harder...or easier?)
- Local, national or international events

As a tool designed for businesses, the major threat to success for most SWOT practitioners is "the competition." Programs to improve the health and well-being of individuals and communities might not have competitors in the market sense, but there could be overlap in services with other agencies that you need to consider. Or perhaps preferences for funding aren't favoring you – you're interested in health promotions, but treatment is getting all the resources.

So it can help to think of the "competition" in a broad sense as you consider threats to your effort. Perhaps the competition for your target population's time and attention exists in a competing unhealthy habit, such as smoking, or in a societal force like tobacco advertising, or even in the lure of couch and TV, which occupy time that might be given to exercise.

HOW DO YOU CREATE A SWOT ANALYSIS? WHO DEVELOPS THE SWOT?

The most common users of a SWOT analysis are team members and project managers who are responsible for decision-making and strategic planning.

But don't overlook anyone in the creation stage!

An individual or small group can develop a SWOT analysis, but it will be more effective if you take advantage of many stakeholders. Each person or group offers a different perspective on the strengths and weaknesses of your program and has different experiences of both.

Likewise, one staff member, or volunteer or stakeholder may have information about an opportunity or threat that is essential to understanding your position and determining your future.

WHEN AND WHERE DO YOU DEVELOP A SWOT ANALYSIS?

A SWOT analysis is often created during a retreat or planning session that allows several hours for both brainstorming and more structured analysis. The best results come when participants are encouraged to have an open attitude about possibilities. While you might "SWOT" in conjunction with an informational or business session, the tone when creating a SWOT analysis is usually collaborative and inclusive.

When creating the analysis, all people involved are asked to pool their individual and shared knowledge and experiences. The more relaxed, friendly and constructive the setting and environment, the more truthful, comprehensive, insightful and useful your analysis will be.

HOW DO YOU DEVELOP A SWOT ANALYSIS?

Here are steps for conducting a gathering to produce your analysis.

- 1) Designate a leader or group facilitator who has good listening and group process skills, and who can keep things moving and on track.
- 2) Designate a recorder to back up the leader if your group is large. Use newsprint on a flip chart or a large board to record the analysis and discussion points. You can record later in a more polished fashion to share with stakeholders and to update.
- 3) Introduce the SWOT method and its purpose in your organization. This can be as simple as asking, "Where are we, where can we go?" If you have time, you could run through a quick example based on a shared experience or well-known public issue (even the new TV season).
- 4) Depending on the nature of your group and the time available, let all participants introduce themselves. Then divide your stakeholders into smaller groups. If your retreat or meeting draws several groups of stakeholders together, make sure you mix the small groups to get a range of perspectives, and give them a chance to introduce themselves.
 - The size of these depends on the size of your entire group – breakout groups can range from three to ten. If the size gets much larger, some members may not participate.
- 5) Have each group designate a recorder, and provide each with newsprint or dry -erase board. Direct them to create a SWOT analysis in the format you choose-a chart, columns, a matrix, or even a page for each quality.
 - Give the groups 20-30 minutes to brainstorm and fill out their own strengths, weakness, opportunities and threats chart for your program, initiative or effort. Encourage them not to rule out any ideas at this stage, or the next.
 - Remind groups that the way to have a good idea is to have lots of ideas. Refinement can come later. In this way, the SWOT analysis also supports valuable discussion within your group or organization as you honestly assess.
 - It helps to generate lots of comments about your organization and your program, and even to put them in multiple categories if that provokes thought.
 - Once a list has been generated, it helps to refine it to the best 10 or fewer points so that the analysis can be truly helpful.
- 6) Reconvene the group at the agreed-upon time to share results. Gather information from the groups, recording on the flip-chart or board. Collect and organize the differing groups' ideas and perceptions.

Decide beforehand how you will gather the input. There are at least two ways to do so:

- Proceed in S-W-O-T order, recording strengths first, weaknesses second, etc.
- Or you can begin by calling for the top priorities in each category -the strongest strength, most dangerous weakness, biggest opportunity, worst threat--and continue to work across each category.

There are also at least two ways to take information from the groups.

- Ask one group at a time to report ("Group A, what do you see as strengths?") You can vary which group begins the report so a certain group isn't always left "bringing up the end" and repeating points made by others. ("Group B, let's start with you for weaknesses.")
- Or, you can open the floor to all groups ("What strengths have you noted?") for each category until all have contributed what they think is needed.

Whichever way you proceed, the facilitator or recorder should keep writing until the input from all groups is recorded. Note repeated items across groups for "weighting" of important possibilities.

You might want to discuss some of the items as they come up. In fact, cross connections between categories-"This strength plays into that opportunity"-is what you're pursuing, so a good facilitator will tease out those insights as they arise.

At the same time, you want to keep the process moving until all the chart is complete, so facilitator and recorder should work together to begin a fifth column or new page-one for working ideas.

Encourage the participants to also make notes of ideas and insights as you build so the drawing together process will continue to be creative and collaborative.

- 7) Discuss and record the results. Depending on your time frame and purpose:
 - Come to some consensus about the most important items in each category
 - Relate the analysis to your vision, mission, and goals
 - Translate the analysis to action plans and strategies
- 8) If appropriate, prepare a written summary of the SWOT analysis to give or e-mail to participants for continued use in planning and implementing your effort.

HOW DO YOU USE YOUR SWOT ANALYSIS?

In some ways a SWOT analysis pushes you to think "inside the box" by asking you to categorize your effort in such simple opposing terms. But the purpose of this information gathering is definitely to help you move outside the box of any constraints or limitations that may have hindered you before.

Knowledge is indeed power, and knowing what the positives and negatives of your program are puts you in a more powerful position for action. While a SWOT analysis is not in itself action, it can be a "support team" to help you:

Identify the issues or problems you intend to change

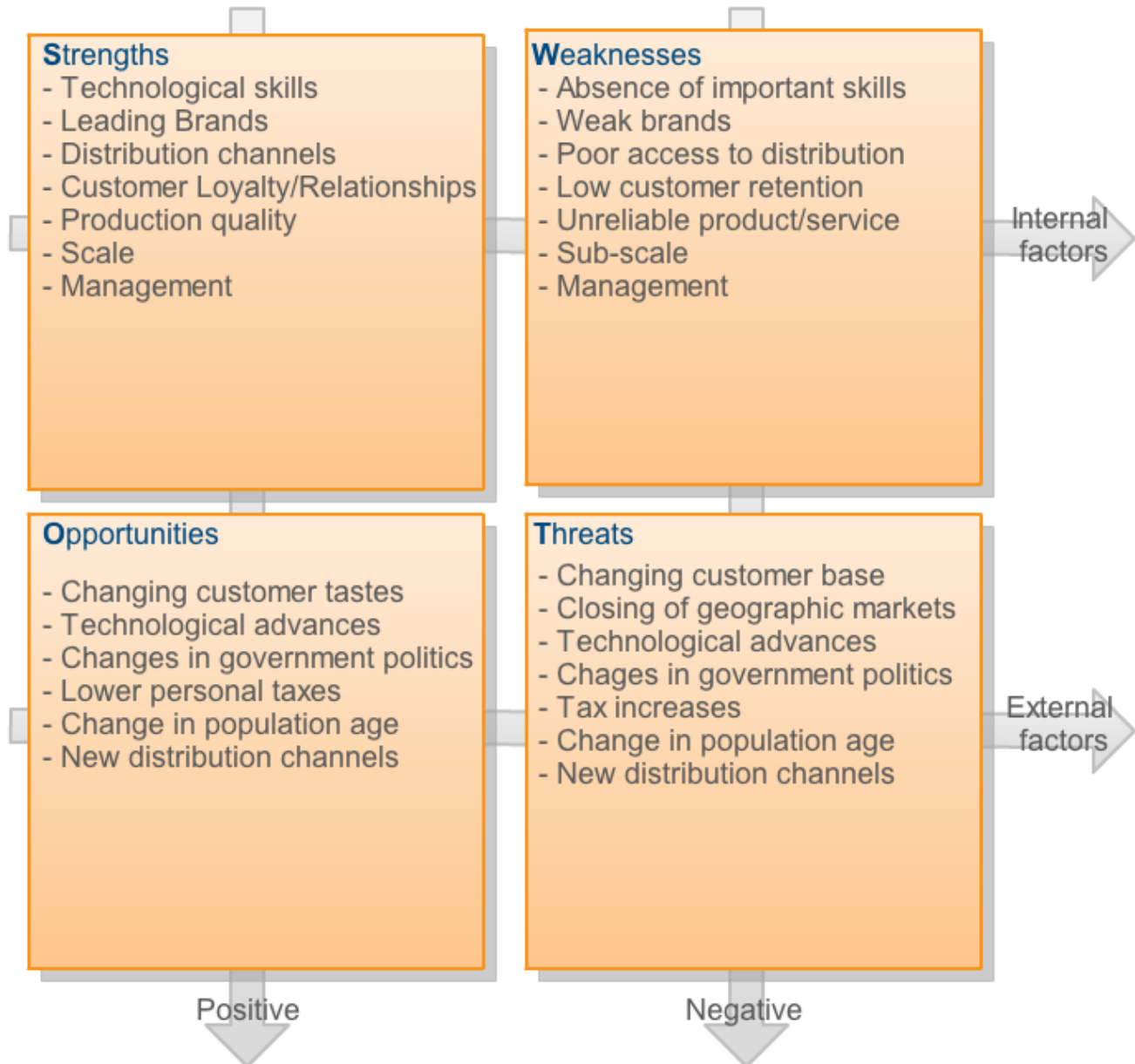
Set or reaffirm goals

Create an action plan

As you consider your analysis, be open to the possibilities that exist within a weakness or threat. Likewise, recognize that an opportunity can become a threat if everyone else sees the opportunity and plans to take advantage of it as well, thereby increasing your competition.

Finally, during your assessment and planning, you might keep an image in mind to help you make the most of a SWOT analysis: Look for a "stretch," not just a "fit." As Radha Balamuralikrishna and John C. Dugger of Iowa State University point out, SWOT usually reflects your current position or situation. Therefore one drawback is that it might not encourage openness to new possibilities. You can use SWOT to justify a course that has already been decided upon, but if your goal is to grow or improve, you will want to use it differently.

SWOT Analysis



SWOT Analysis



CASE STUDY

JOHNSON & JOHNSON

Johnson & Johnson is a U.S multinational medical devices, pharmaceutical and consumer packaged goods manufacturer founded in 1886. Its common stock is a component of the Dow Jones Industrial Average and the company is listed among the Fortune 500.

Johnson & Johnson ranked at the top of Harris Interactive's National Corporate Reputation Survey for seven consecutive years up to 2005, was ranked as the world's most respected company by Barron's Magazine in 2008, and was the first corporation awarded the Benjamin Franklin Award for Public Diplomacy by the U.S. State Department in 2005 for its funding of international education programs. However, in recent years the company's reputation has been adversely affected by product recalls, fines for pharmaceutical marketing practices, litigation with a group of shareholders, and other legal issues.

Johnson & Johnson is headquartered in New Brunswick, New Jersey with the consumer division being located in Skillman, New Jersey. The corporation includes some 250 subsidiary companies with operations in over 57 countries and products sold in over 175 countries. Johnson & Johnson had worldwide sales of \$65 billion for the calendar year of 2011.

Johnson & Johnson's brands include numerous household names of medications and first aid supplies. Among its well-known consumer products are the Band-Aid Brand line of bandages, Tylenol medications, Johnson's baby products, Neutrogena skin and beauty products, Clean & Clear facial wash and Acuvue contact lenses.

On December 31, 2012, the Food and Drug Administration approved Sirturo, a Johnson & Johnson tuberculosis drug that is the first new medicine to fight the infection in more than forty years.

In nutshell -

- Johnson & Johnson formed in 1886 and it released its product of note in 1896
- The firm branched out in 1919, and was listed on the New York Stock Exchange in 1944
- Over the years Johnson & Johnson has grown substantially due to strategic acquisitions such as Neutrogena in 1994 and DePuy in 1998. From 1989 to 1999, the company made 45 such acquisitions of companies and product lines
- Today the firm can boast of revenues exceeding \$61,897 million during the financial year ending in December 2009

Johnson & Johnson products fall into three main categories: Pharmaceuticals, Medical Devices & Diagnostics, and Consumer Health care

STRENGTHS

- 1) A Substantial Marketing Arsenal – Can call upon a network of subsidiaries with significant sales and marketing prowess, as well as expertise in a number of therapy areas. The company possesses a global sales force which serves to attract joint venture possibilities
- 2) Strategic Acquisitions – Maintained a stable financial position by utilising cash reserves to finance corporate acquisitions
- 3) Product Diversification – The pharmaceutical, Medical Devices & Diagnostics and Consumer Health divisions act to reduce dependence upon any one area and allows a wider range of choice when pursuing opportunities with the greatest growth prospects
- 4) Positive Revenue Growth Projections – The potential of an impressive number of new product launches and the promise of achieving forecast sales is said to bode well for Johnson & Johnson

WEAKNESSES

- 1) Dependence upon the Success of Launch Products – Many new launch products are vulnerable to the uncertainty of regulatory review
- 2) Reliance on Small Molecule Drugs – Small molecules are more impacted by generic competition. Johnson & Johnson's small molecule drug sales declined in 2008 and are forecast to fall further into 2012. The necessity of finding replacements for billion dollar products as they mature represents a daunting task

OPPORTUNITIES

- 1) Wide Range of Potential Cross-selling Opportunities – Johnson & Johnson is in a position to strategically develop a myriad of cross selling opportunities. Maximizing its balance between pharmaceuticals, diagnostics, and medical devices could result in increased revenues
- 2) Potential to Exploit Biologics Market – The addition of further biologics (e.g. therapeutic proteins, antibodies) to its portfolio can serve as a buffer as small molecule patents expire.

THREATS

- 1) Dependence on the Success of Launch Products – Many new launch products are vulnerable to the uncertainty of regulatory review, therefore, a reliance upon launch products potentially represents a threat to Johnson & Johnson's outlook.
- 2) Negative Impact of Recent Product Recalls – Johnson and Johnson has had the misfortune of having to recall of more than 40 medicines recently. The company stands to take a hit to its reputation, competence and integrity.

PLEASE REFER THE FOLLOWING CASES FOR YOUR PRACTICE -

<http://businesscasestudies.co.uk/ikea/swot-analysis-and-sustainable-business-planning/swot-analysis.html>

<http://www.ifla.org/node/5749>

<http://www.slideshare.net/OsamaAlbarrak/ikea-strategic-case-study>

<http://businesscasestudies.co.uk/skoda/swot-analysis-in-action/introduction.html#axzz2qBHb29MX>

<http://businesscasestudies.co.uk/ikea/swot-analysis-and-sustainable-business-planning/swot-analysis.html>