



# Chapter 4

## CASE STUDIES

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# Case studies – course outline



- ❖ Introduction
- ❖ Objectives of case study
- ❖ Phases of case study
- ❖ Steps of case study
- ❖ Types of case studies

The tallest oak in  
the forest was once  
just a little nut that  
held its ground.

Quotes Love and Life .com

# 1. Introduction



*The **case study** techniques is based on the belief that the trainee can be kept attain managerial understanding & competence through the study, and discussion of actual situations.*

A case study has a different meaning depending on how it is used. To some people, it will mean same as a legal case; to the research, a case may be appear as a vehicle for testing hypothesis. We are concerned with the form of case study most suited to our objective in management education. *This form of case study will present the student with an authentic management problem.* It will present reports, facts and even opinions, **but will not evaluate**. *The aim is to train the student in analysis & decision-making. This aim is ensured by facing the student with a whole series of case situations.*

## 2. Objectives of case study



Case study method accomplishes several objectives of management development programs.

- i. It distributes knowledge and facts.*
- ii. It improves participant's skill in problem analysis, communication and decision-making.*
- iii. It affects attitude formation and student think that nothing is absolutely 'right' or 'wrong' in the field of human behavior.*

Study of the cases requires considerable times. The task of gathering all the pertinent facts, arranging them, and then putting them into effective writing is a long & often tedious process.

# 3. Phases of case study



A case study has five phases.

**First phase:** The first phase is for each member of the group to study the details. Two major questions are:

- a. *What is happening or has happened? and*
- b. *What additional data are essential for classification?*

**Second phase:** *This phase consists of collection of additional facts.* Group members can ask for more details from the discussion leader. When items are collected they need to be organized with particular reference to their applicability to decision-making.

**Third phase:** *The group as a whole must consider what the problem is for the organization & what the corrective way is to phrase the critical questions at this stage.* (however, in quite a few cases, questions are provided).

### 3. Phases of case study



**Fourth phase:** Each member of the group write down his own answers to the questions.

*“How would I handle the incident?”*

*“How would I support my decision?”*

If there have been different decisions, smaller groups of people who have taken the same view should be formed. Their task is to present the strongest argument possible to support their joint decision.

- Decisions are discussed.

**Fifth phase:** *The final phase is to try to learn from the case as a whole. E.g. “How could more have been achieved ?”*

# 4. Steps of case study



1. **State the problem:** After reading the case thoroughly and after studying the problems at the end of the case, write a statement of the problems – what is the case about, what is there to be done, what action has to be taken, or what questions have to be answered?
2. **Collection and analysis of data:** In order to analyze & evaluate effectively the data presented in the case, the data must be analyzed and arranged in a systematic manner.
3. **Formulate tentative solutions:** It is better to develop the habit of regarding initial conditions as tentative. There are several tentative solutions available. All should be given due consideration.

# 4. Steps of case study



4. **Select a recommended solution:** From the list of tentative solutions, a single solution has to be selected. The final solution should offer the best answer to the problem as stated, based upon the given data.
5. **Preparing written reports:** Results of the case should be presented in a written form.
6. **Checklist:** Following is the criteria to judge whether you are going in a right direction:
  - *What is achieved by the solution ?*
  - *What difficulties have to overcome to achieve the objective?*
  - *What limitations are there in the situations? (eg. Time, money, equipment, manpower etc.)*
  - *What is the best alternative?*



# 5. Types of case studies



Under the more generalized category of case study exist several subdivisions, each of which is custom selected for use depending upon the goals and/or objectives of the investigator. These types of case study include the following:

- **Illustrative Case Studies:** These are primarily descriptive studies. They typically utilize one or two instances of an event to show what a situation is like. Illustrative case studies serve primarily to make the unfamiliar familiar and to give readers a common language about the topic in question.
- **Exploratory (or pilot) Case Studies:** These are condensed case studies performed before implementing a large scale investigation. Their basic function is to help identify questions and select types of measurement prior to the main investigation. The primary pitfall of this type of study is that initial findings may seem convincing enough to be released prematurely as conclusions.

# 5. Types of case studies



- **Cumulative Case Studies:** These serve to aggregate information from several sites collected at different times. The idea behind these studies is the collection of past studies will allow for greater generalization without additional cost or time being expended on new, possibly repetitive studies.
- **Critical Instance Case Studies:** These examine one or more sites for either the purpose of examining a situation of unique interest with little to no interest in generalizability, or to call into question or challenge a highly generalized or universal assertion. This method is useful for answering cause and effect questions.

# Case report writing methodology



## 1. **Organizational background:**

- Organizational goals and objectives.
- Formulation of organization.
- Organizational structure.
- Social needs & value.
- Historical relation.
- Financial position.

## 2. **Case study report**

- Identification of problem.
- Developing the hypothesis.
- Preparing case research design.
- Collection and analysis of data.
- Generalization & interpretation of problems.
- Conclusions and Recommendations.

# Case study relevant titles



1. *Acknowledgement.*
2. *Organization (history, objectives, input, process, output)*
3. *Organization structure (organization chart).*
4. *Forms of ownership.*
5. *Personnel policies.*
6. *Manpower planning.*
7. *Recruitment and selection of manpower.*
8. *Training and development of manpower.*
9. *Job evaluation.*
10. *Merit Rating*

# Case study relevant titles



11. *Wages and incentives.*
12. *Motivation.*
13. *Marketing.*
14. *Leadership.*
15. *Management information system.*
16. *Drawbacks.*
17. *Suggestions and recommendations.*
18. *Conclusions.*
19. *References.*



***THANK YOU!!!***