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Open the case and
clarify the key question

The goal of opening the case is **making sure you understand the client's question & context** correctly -

If this is not done properly the case will not be a success



Goals

Mentally prepare yourself for case interview

Double check that you understood client context and question correctly

Stakes are too high - you don't want to develop brilliant recommendations for a different situation

Ask clarifying questions to gain sufficient understanding to develop structure

Develop your initial understanding of client's Situation, Complication, Question



Timing

Typically one question to check you understood client question correctly and up to 5 additional clarifying questions

Take your time to understand the problem... but make sure you develop your structure before attempting to solve case

Key steps to open the case



Mentally transition from the fit interview & calm down

Stop thinking about what you've said in the fit part

Listen carefully, don't start solving right away even if you feel you've "got it"

Take your time to breathe & refocus

Keep your connection to the interviewer



What exactly is the client's question? Do I understand it correctly?

Always write down the formulation of the question verbatim, read before making a recommendation

Reformulate in your own words and check with interviewer

Consider implications: does the formulation eliminate or demand any analyses?



Who is the client? How does the business in question works?

Can you easily see the client's activity in your imagination? Clarify until you do

Best time for questions is now - take enough of it

If you don't understand a certain term - clarify until you do

If you are familiar with the industry - check assumptions



Why are they asking this question? Why now?

What has changed for the client? Why it is a problem?

What causes may be the underlying the problem?

What would be a good solution to the problem, how to formulate is as a question?

Good solutions always introduce constraints



Are there additional goals / limits?

Consider what is important for the client, clarify if there is more than one goal

Are there things that the client can't do?

Does this affect the formulation of main hypothesis made in previous step

The case may not have additional goals or limits

What happens if you miss an opening element



Lack of attention & presence in discussion

Misunderstood question & wrong recommendations

Unusable structure & misguided analysis

Insufficient context & weak hypotheses

Inability to focus or impractical solution

Example: Opening a case for a hotel chain



Mentally transition from the fit interview & calm down

"The desert expeditions you've led definitely sound exciting."

I have a perfect case for you! It's for a mode of transport that's a little more mundane - we will be advising a struggling hotel chain."



"Hmmm, sounds exiting!"
.... 15 sec pause



Forgot about deserts & how unclearly I described my role



Relaxed, took two deep breaths



Not staring at the desk blankly



What exactly is the client's question? Do I understand it correctly??

"The chain has been losing customers for 2 years now to Airbnb & similar services and asked us to help them find a way win them back"



Wrote down the question verbatim

"Let me make sure I understand the question correctly: we need to help a hotel chain get their old customers back from Airbnb?"

"Not necessarily old customers: they want first to stop losing customers and then get new ones - doesn't have to be the same ones they had before"



Maybe we should not focus on why old customers left?



Who is the client? How does the business in question work?

"Does the hotel chain only run hotels? No serviced apartments, timeshares, something else?"

"No, not at the moment - they've considered opening an apart-hotel line, but that idea never took off"

"Sorry, just to clarify - what are apart-hotels? Is it just having a kitchen in the room?"

"It's more than that - you'll also have washing facilities, often several rooms - essentially it's a very short-term apartment lease with hotel services on top"



Maybe they don't have to be that limited?



Why are they asking this question? Why now?

"AirBnB has been on the market for a while: why has the client only felt the impact just in the last 2 years?"

"Before that there was legislation that limited residential leases, it was repealed 2 years ago"



Maybe their clients had no choice then, but now when they have a choice, hotel model might not be the best fit for their needs?

"So, to help the client we need to formulate a new business model that would address the clients' better than the classic model & what Airbnb & al could do?"

"Yes, that would be close to what they want to figure out"



Are there additional goals / limits?

"Can we change the main hotel business or should we focus on a new business line"

"The owners believe that their existing business has it's loyal customers, but they're willing to make adjustments in capacity or operations to make thing work They're fine with the new business line as well"

"Why they chose not to enter the apart-hotel business before?"


"Following the same regulation that blocked Airbnb they could not buy apartments - they could only construct new buildings, they could find good land parcels"



Apart-hotels definitely sound like an idea to explore in a new context

Mentally check your initial understanding:

"What are client's Situation, Complication, Question?"

	Understand the Situation	Determine the Complication	Formulate Key question	
Definition	Define the overall context within which we will resolve the problem	Describe and define the cause of the problem	Set a clear constraint for the problem we will address	
Common issues	<ul style="list-style-type: none"> • Internal economics • Competitive advantage • Industry environment 	<ul style="list-style-type: none"> • New competitors from unrelated industries • New technologies revolutionizing cost base 	<ul style="list-style-type: none"> • How can we stay competitive despite new threats? • Can we adapt to take advantage of new technologies? 	 Articulate the Resolution
Example	Company A has been the undisputed leader for 10 years	In the last year, Company A lost 10% share to new market entrant X	How can we compete with X to maintain our position as market leader?	

Defining the “SCQ-R” focuses work on the key question

"What should the client do?"

"How should the client react to the new market entrant?"

"How should the client position their product given the new market entrant?"



Good key questions are crisp, actionable, and unambiguous



The key question evolves over time as more information is uncovered