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9B18M058

STUDENT Guide to the Case Method: note 6—preparing for and writing a case exam

Susan J. Van Weelden and Laurie George Busuttil wrote this note solely to assist students with understanding and using the case method. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. The authors may have disguised certain names and other identifying information to protect confidentiality.

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A *case* or *case study* is a real business story that requires you to step into the role of a manager or a member of the management team that faces a dilemma, or the role of a consultant assisting an organization that faces a dilemma. Acting in that role, you are tasked with resolving the issues or problems that the profiled organization is facing at a particular moment in time. Alternatively, you are asked to evaluate and choose among opportunities that exist for the organization at a specific point in time. Those issues and opportunities may be confined to a specific discipline in business, such as accounting, marketing, human resources, or strategic management. However, the challenges often involve several disciplines, reflecting the multi-faceted nature of business in practice.

The case method involves learning by doing. It provides you with an opportunity to apply your knowledge and skills to real-life and realistic situations. Listening to class lectures, reading about various business subjects, and performing quantitative and qualitative analyses to solve well-defined problems are all valuable learning tools; however, management skills and knowledge cannot be developed by these methods alone. Management requires more than applying a storehouse of prepackaged solutions or standard answers. Each situation faced by management has its own variables unique to the situation. Using the case method provides you with valuable opportunities to develop and practise skills you will need in those situations.

1. Introduction to Writing a Case Exam

The method for a basic case analysis presented in Note 2 of the Case Guide Series—“Performing a Case Analysis,” No. 9B18M054—can be used for various purposes: discussing the case in class, writing a report, making a presentation, or writing a case exam. This note guides you in preparing for and successfully writing a case exam.

The guidelines in this note are for general use. You should always defer to your instructor’s requirements, which may differ or be more specific.

1. Purpose of a Case Exam

The task of performing a case analysis might form part or all of your examination for a course. If it forms only part of your exam, your instructor will likely use short cases or direct you to restrict your analysis to specific tasks. If performing a case analysis represents the entire exam, you should expect a longer case with less direction, although your instructor might still provide a set of questions to guide your analysis.

A case exam is designed to test your ability to apply the case method under constraints of time and resources. If an exam is performed in a closed-book setting, you are expected to remember and understand course concepts, models, and theories well enough to apply them to the assigned case. If an exam is performed in an open-book setting, you must still have sufficient knowledge of concepts, models, and theories to be able to recognize which are relevant to the case and where to find them quickly in your notes or text.

Your instructor’s decision to evaluate your performance using a case exam indicates that the main learning outcome is application of the course concepts, models, and theories. Application requires a higher level of understanding than memorization and recall. This approach is also consistent with the classroom discussions if your course has made significant use of cases.

1. Preparing for a Case Exam

Studying for a case exam is unlike studying for other types of examinations in that the goal of a case exam is application rather than memorization or recall. It also differs in that you do not know what type of questions to expect on the exam. For both of these reasons, you are limited in terms of what you can study before the exam. If the exam is open-book, your preparation should include determining the material you are most likely to want to use and how you will access it quickly.

* 1. **Reread Notes and Texts**

Reread your notes and reread your text in anticipation of the course concepts, models, and theories you are most likely to be asked to apply in the case exam. Your priorities should be guided by the following:

* Course learning outcomes in your course syllabus or on the course website.
* The types of cases assigned throughout the course—the size of case, nature of issues, topics covered, and types of industries.
* While a case exam will not ask you to recall specific facts from cases used in class, cases used in class do provide some important clues regarding the issues you will encounter on the case exam.
* Types and depth of analysis required during the course—full case analysis, partial case analysis, or simply answering questions.
* Due to time limits in a case exam, you will not be expected to apply the same depth of analysis that you would be expected to apply in class discussion, written reports, or presentations. Nonetheless, a case exam will often require that you perform all of the usual steps of analysis. If all steps are not required, your instructor will usually alert you to this requirement before the exam. (For a discussion of partial and full case analysis and directed cases, see Note 2 of the Case Guide Series—“Performing a Case Analysis,” No. 9B18M054.)
* Concepts, theories, and models emphasized in class discussions, especially those that were discussed frequently.
* Any instructions your instructor provides about the focus of the case exam.
  1. **Practise Writing a Case under Exam Conditions**

It is useful to review one or two of the cases discussed in the course and redo the analysis under the time constraint imposed by the exam. Because you will be familiar with the case, consider giving yourself less time than will be available for the exam. Also, simulate exam conditions, including whether it is closed-book or open-book.

Practising for an exam helps you assess which case analysis steps will require better time management during the exam. Practice also gives you some confidence that you can perform the expected analysis within the allowable time.

1. Writing a Case Exam

Writing a case exam can be an anxious time, given the time constraints and the uncertainty of being thrust into a new situation. Successfully writing a case exam requires that you remain calm and manage your time wisely.

* 1. **Read the Instructions**

Carefully read the instructions to maximize your opportunity to excel in the exam.

Your instructor will likely provide some questions, either at the end of the case or in a separate document. In a directed case, your assignment might simply be to answer those questions. In a case requiring partial or full case analysis, the questions should help you to identify key issues and the analyses you need to perform. For example, questions such as, “What threats are posed by traditional and non-traditional competitors?” and “Is the company’s competitive advantage sustainable? If not, how can it build a sustainable competitive advantage?” help you to identify potential issues as being increasing competitive threats and lack of a sustainable competitive advantage. The questions also suggest two types of analyses that might be helpful—a competitive position matrix and a competitive advantage analysis. Questions such as, “What are the pros and cons for the company focusing on a niche market?” or “Assess the potential of increasing the number of product lines,” help direct your attention to two potential alternative solutions for evaluation: serving a niche market or increasing the number of product lines.

In addition to carefully reviewing any questions provided by your instructor, look for instructions regarding:

* the role you are to assume when performing the analysis and writing the report;
* steps in the case method that are required for the exam;
* key issues; and
* the format of the report.

For example, consider these instructions:

Acting in the capacity of a consultant, write a report to James Alou, chief executive officer, who has asked you to evaluate the proposed new sales incentive plan for Andover Manufacturing Inc. (AMI).

Your report should identify the issues associated with the new incentive plan, analyze the issues, and present appropriate recommendations. Each recommendation should be justified by clearly identifying which issue or issues the recommendation is designed to address, by presenting its major advantages, and by addressing any significant disadvantages. It is NOT necessary to present possible alternatives that you do not recommend.

An appropriate heading, introduction (which can include identifying the issues), and brief conclusion are required. An executive summary is NOT required.

These instructions specify the role you are to play (a consultant). They direct your attention to evaluation of the new incentive plan, and suggest that there are issues related to that plan. The instructions also restrict the steps you are to perform in completing your analysis. Lastly, the instructions provide guidelines for the report format.

Watch for additional instructions regarding numbering of pages, required page headers, and assembly of your exam.

* 1. **Read the Case**

Give yourself time to read through the case twice. In your first read, skim the case. Your goal during the first read is to develop a preliminary understanding of the issues, problems, or opportunities (collectively referred to hereafter as “issues”) facing the decision maker. In the first read, resist the temptation to highlight text in the case, except for key questions raised by the principal actors or characters. Questions raised by the principals are important to note because they help you to identify key issues. (For further information about how to read a case, see Note 1 of the Case Guide Series—“Understanding the Case Method,” No. 9B18M053.)

Your second read of the case should be more deliberate to help you gain a better understanding of the issues and any potential solutions proposed by the principals. You should also identify relevant analyses to perform and case facts that you can use when performing those analyses. Highlighting the case at this stage will help you use the case facts effectively.

In a three-hour case exam, you should spend no more than 45 minutes reading the case.

* 1. **Prepare an Outline**

While preparing an outline of your report can appear to be an extra step that consumes valuable time, taking 15 minutes to briefly map out key parts of your report helps you to allocate your time and will likely save you time later. An outline provides a valuable roadmap to keep you focused, allowing you to move methodically from one step to the next. It prevents you from losing sight of excellent ideas and becomes especially important as you begin to feel more rushed toward the end of the exam.

Your outline should identify the main parts of your report, the key issues, important points for your analysis of the issues and the tools you intend to use, and at least some alternative solutions—particularly those raised by the principals in the case or identified in questions that accompany the case.

Your outline could also include key decision criteria to use when evaluating the alternative solutions you develop (see Section 4.4.5 or Note 2, Section 4.2).

* 1. **Write Your Report**

When writing your report, start each section on a separate page and double-space your answer. This format will allow you to easily add more material later without crowding what you have done so far. Remember to use proper report format, unless otherwise directed. Here, again, it is important that you have carefully read the instructions so that you do not spend time on tasks that do not help you earn marks.

Refer to Note 4 of the Case Guide Series—“Preparing a Written Case Report,” No. 9B18M056—for more information about the required components of a report and how to write an effective case report. Bear in mind that an instructor generally scales back the expectations for a report written under the time pressure of an exam.

* + 1. Prioritize and Manage Your Time

Allocate your time to the most important tasks: the analysis of issues and the evaluation of alternative solutions. For the introductory paragraph and the conclusion, do just enough to achieve their required purpose. Provide an executive summary only if your instructor directs you to provide one.

During an exam, as long as you identify the key issues and key alternatives, it is generally better to analyze fewer issues and alternatives well than to attempt to deal with too many issues and alternatives, which might result in you running out of time. Here, your report outline will come in especially handy; refer to it to stay on track.

* + 1. Identify the Issues

Keep your identification of issues brief and to the point so that you avoid repeating content when you perform the subsequent analysis. Also ensure that your set of issues is manageable.

* + 1. Analyze the Issues

Use concepts, models, and tools to analyze the issues so that your analysis reflects the necessary rigour to demonstrate your mastery of course concepts. However, here again, adhere to your outline so that you do justice to all of your chosen models and tools.

* + 1. Identify Alternative Solutions

Identify any potential solutions that were considered by the principals in the case or that were suggested by your instructor in the directions and questions provided to you. Since keeping things the same is seldom a viable alternative, you are generally better to allocate your time to alternatives that offer some improvement. Identify other alternatives, as long as your set of alternative solutions is still manageable.

* + 1. Evaluate Alternative Solutions

Evaluate how effectively potential solutions will resolve one or more of the issues you have identified.

Establish your set of decision criteria to help you quickly generate the pros and cons of your proposed solutions and to evaluate your alternatives consistently. For example, in a strategic management case, decision criteria might include the degree to which the action:

* fits with the organization’s mission, value proposition, and goals;
* fits with stakeholder preferences;
* is profitable;
* capitalizes on specific external opportunities;
* builds on an existing competitive advantage or helps to create a competitive advantage; or
* requires additional resources and competencies.

It is especially important when performing a case analysis in an exam setting to choose a manageable set of criteria so that you can fully capitalize on a framework for developing pros and cons. (See Note 2 for detailed information about evaluating alternatives.)

* + 1. Make Your Recommendation

In an exam setting, the most important parts of your recommendation are *what* you recommend and a *brief* summary of *why*—specifically how your recommendation resolves the issues you identified.As time allows, you can fill in the *who*, *how*, and *when*.If your instructor requires an implementation plan, consider using a chart, which is the most efficient way to complete this task during an exam, especially as your time draws to a close.

1. Case Analysis and Academic Integrity

Because case analysis is complex, it may often seem helpful to discuss the case informally or formally with other students before participating in a class discussion, writing a report, or making a presentation. Managers and consultants often discuss problems with other people, within the constraints allowed by confidentiality. Therefore, your instructor may allow, encourage, or even require such discussion. However, ***to ensure academic integrity and to avoid plagiarism, unless your instructor has specifically indicated that some degree of discussion is permissible, you should consult with your instructor before engaging in any collaboration***. This restriction on outside discussion is especially necessary when preparing reports and presentations.

It may also seem helpful to search the Internet for teaching notes for cases or for case reports or slide presentations prepared by other students. Academic integrity requires that you refrain from using such resources, in full or in part. Any attempt to use the work of others and to pass it off as your own is plagiarism. If the instructor is suspicious that plagiarism might be involved, you may be asked to upload a copy of your case report through Turnitin.com.

While using the work of others may appear to provide a shortcut to a good grade, the quality of online sources and the work of other students is often suspect, at best. Most importantly, you deprive yourself of the learning opportunities the case method offers.