

Case Study

as a learning tool

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APPROACH TO CASE STUDIES

At a conference several years ago, I heard many science educators at all levels talk about “doing science.” At first, it sounded somewhat strange. As I listened and understood the phrase in context, it made eminent sense. They were simply saying “the only way to learn science is by practicing it.” In the same spirit, I say “let's do marketing” to the tune of cases.

What is a case study anyway?

All case studies have one common goal: to help learn the subject matter in hand. Therefore, we must not approach case studies as isolated assignments that must be completed to get a passing grade. Basketball players shoot free-throws during practice so that it comes easier in a game setting. Likewise, cases allow learners to practice and hone their skills in their chosen disciplines so that they can do it better in real life.

Learning changes the learner in overt and covert ways. As a result of learning, we do not spontaneously start exuding brilliance but our behavior, in the broadest sense of the term, changes in many ways. Since this change takes place in the learner, it must rely on his or her mental processes. In other words, the learner must experience the phenomenon in a uniquely personal way. I cannot imagine anyone learning “not to touch a hot stove because it burns” without experiencing the pain first hand. We all have touched a hot object and got “burned” to learn what “burning” means. Likewise, we can learn from our experiences in studying marketing cases. In normal class settings, experiencing marketing may be difficult for variety of reasons. This is where cases emerge as substitutes for real life experiences.

A well-prepared case study, as a microcosm of real life, gives the learner an opportunity to project himself or herself into a situation and interact with the information and the imaginary participants in the case. From this interaction, all readers may extract slightly or substantially different learning experiences. In order for this process to be fruitful, the learner needs to treat the case as an opportunity, as a challenge rather than an assignment that must be completed, turned in and forgotten. The process of analyzing a case and discussing it with others is very much an integral part of the learning process.

How to get the most out of cases

Quite often, case studies will narrate the circumstances covering a particular period with corresponding data of different sorts. Not every piece of information or data directly helps in understanding and analyzing the case. Separating the chaff from the wheat is an essential part of the learning process as we must do the same in our professional lives.

Although everyone may develop his or her personal way of studying cases, some general guidelines may help the beginners. In the following section, you will find some general suggestions. You should take them as what they are: suggestions. No single template will suit everyone's needs to arrive at intelligent conclusions. If such a template existed, every decision maker would use it to make the best decision under all circumstances. Obviously this does not, cannot happen.

Suggestions

In all your case work always remember that you are learning marketing. Learning at advanced levels, as you will, requires foundation knowledge. Do not rely on your “common sense” as the sole or even most of your analysis. You need to use marketing knowledge to analyze marketing problems. Your analysis must use well established marketing knowledge and theory glued together with logic and common sense.

- Before tackling the full case familiarize yourself with it. Depending on the length of the case, this may require more or less time but probably not more than several minutes. Quickly skim the material to develop a general sense of the structure, the people involved, the kind of organization under study, and similar general information.
- Return to the beginning and start reading the case carefully, underlining what might be important information and making marginal notes as necessary. Be selective in what you underline for its purpose is to attract attention to key ideas. Also important is to make connections among ideas both mentally and visually. So, draw a connecting line if some ideas are related. You may even consider writing on the connecting line the essence of the relationship as you see it.
- Try to understand who is trying to make what decision with what kind of constraints. “Who” may refer to an individual or an organization such as a company.
- Separate the symptom from the problem. Do not accept what the case presents without critically evaluating the information. If the case says “our promotion has not created the desired result” do not immediately assume that the core decision area is “promotion.” “Promotion not working” may very well be a symptom of another or a deeper problem.
- Determine the strategic area where a decision needs to be made. Your knowledge of the subject matter will be your first line of defense of attack. Although there are no “best” solutions to cases, you must firmly seat all “plausible” solutions in a body of supporting knowledge of, in this course, marketing. What makes one case analysis better than another is not the “answer” or the decision but the quality of analysis-synthesis and the support given for it.
- Use appropriate tools of analysis. If the case offers relevant financial data, use financial analysis tools like financial statement analysis, financial ratios and the like. When

dealing with behavioral information, you will tap into your knowledge of consumer behavior and theories explaining behavior, and so on.

- Do not assume that you can simply use common sense for analyzing information although common sense is a desirable trait. Remember that the purpose of studying a case is to help you learn the subject, marketing. “Arm-waving” with common sense will result in, well, arm-waving which is not the same as sound analysis.
- When writing the result of your analysis, do not simply rehash the information in the case. Tell the reader what that information means, what needs to be done, and why. Focus your attention on the result of your analysis of the case rather than the material that you used. At times, you will find it necessary to point to a particular piece of information or data in the case. In such circumstances, make the reference direct and brief.
- Your written case report must convey your thoughts clearly. Do not leave points open for interpretation. The reader of your report may not interpret them the way you want and expect. Clearly articulate your thoughts using proper marketing and business terminology and clear English.
- Remember that there is no “correct answer” to a case. The reason for studying them is to remove the illusion that there may be a singularly correct answer to questions faced by marketers. In learning with cases, the road traveled is more important than the destination.
- Pay attention to the “road” since you will travel that many more times. Reflect on what you have done and observe what you have learned and understand why. This is precisely the reason you have studied a case.