**MKG631**

**How to Prepare Case Analysis Summary**

A key part of this class is a weekly summary and review of the Harvard Case studies you are required to read, review and summarise. The purpose of a case study is to teach how identify the critical issues facing a company and how marketing managers make decisions in the face of various challenges and opportunities.

Each week you have been assigned a particular case study. A case study is simply a detailed overview of facts and figures pertaining to a company and its particular situation. It will present third party opinions, but it is not an interpretation of the situation. The challenge in any case analysis is to interpret the contributing factors to the situation and how well placed the company is well placed to address the situation.

Once you have read and reviewed the case, you will prepare an individual written summary, broken down by the four following components:

1. **Situation Overview.** This should review and assess the corporate and marketing strategy, its competitive position and what has made the company successful to date within the competitive context of the industry. A review of the operating and financial aspects of the company may also be important. (20%)
2. **Problem Statement and Critical Success Factors.** The problem statement is a brief summary of the key opportunity or challenge the company faces, based upon the discussion in the situation overview. Critical Success Factors are the necessary conditions to ensure the company can succeed in the future**.** They reflect the strengths and weaknesses of the company, and which of these are most important to capitalize on opportunities and ward off threats. These could include, for example, maintaining brand equity, channel relationships, etc. (10%)
3. **Assessment of Decision Options** – normally 2 or 3 different marketing decision options the company could consider. Consider both strategic and financial assessment and implications, and are the decisions compatible with the companies core competencies and competitive position. (50%)
4. **Decision Option and Implementation** – justify why you have selected one of the decision options above, especially in comparison to the other options. You should discuss in detail why the chosen strategy is appropriate and details of how it may be implemented. (20%) Consider in your justification (but not limited to):
   1. Financial implications
   2. Competitive position
   3. Strategic implications – growth opportunities
   4. Corporate culture and management philosophy

**Specific Requirements and Guidelines**

The case study summary should be 5 pages, 11 font, 1 ½ spaced. This is required to ensure fair grading to all students. Subtitling the report according to the four components above is not necessary, though the flow of the report should reflect these.

Case summaries should be submitted at the beginning of class in hard copy form. Electronic copies will not be accepted. Please ensure you have a copy for class discussions on the case, which will take place at the beginning of the class when summaries are due.

Many students tend to, especially in the situation overview section, simply repeat or quote directly what was stated in the case study. Please avoid this. The objective of the report is to present your interpretation and understanding, in your own words. Simply repeating the facts of the case does not qualify for grades.

Excellent reports will undertake quantitative or basic financial analysis to highlight situations or justify decision options, when appropriate. Well prepared and presented analysis underpins A+ papers. Such analysis should be included in an appendix, and not within the required 5 pages of the summary.

Grading criteria for each of the four components of the summary is as follows:

**C- and below** - Addresses the topic minimally, with virtually no support offered for the answer

**C/C+** - Addresses the topic fairly, but offers little support from facts, theory or interpretation

**B/B-** - Addresses the topic sufficiently, with some support from facts and theory, and offers reasonable insight and interpretation

**A-/B+** - Addresses the topic well with complete and sufficient support from facts and theory with good insight, understanding and interpretation

**A/A+** - As above but offers a unique insight and personal interpretation beyond the facts researched. Shows an exceptional understanding of the concepts in marketing, and undertakes own analysis and logic to justify opinions and recommendations