

HOW-TO WRITE A CASE STUDY PAPER

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So you need to write a paper on a case study? This “how-to” guide outlines key points to writing a successful paper including context, preparation, draft, proofing, and finalization.

What is a case study?

Business schools have long used case studies to teach and challenge students to hone their skills in business analysis and writing. Ultimately, business case writing is the basis for case study exercises and case competitions. A business case is a proposal to decision-makers that seeks approval through recommendations for a project, initiative, strategy or activity. In short, a business case is a persuasive argument that supports decision-makers.

There are many different formats for a business case. One of the most comprehensive is Canada’s Treasury Board Secretariat’s Business Case Template and Guide.¹ Please review these documents to understand all that might go into a business case.

Preparation

1. Read the assignment’s instructions.
2. Read and reread the case so that you can explain it in an elevator conversation.
3. Research alternative sources. Do not stop at Wikipedia.
4. Reread the assignment’s instructions and answer the following questions:
 - a. Who is the audience for your analysis?
 - i. The audience may not be evident in the assignment. If the instructor does not clarify this, then make sure it is noted in your final paper. The first step in the alignment of your article begins with for whom you are writing.
 - b. Can you put the assignment’s instructions and questions into sub-title format?
 - i. These subtitles can be added to your paper and ensure that you are addressing the critical issues. This is also a useful exercise that has a real-world application where you are clarifying what your boss (i.e., internal case study) or client (i.e., external consulting case study) wants to see answered in a business case.
5. Develop a strategic analysis of the case
 - a. Problem or issue identification
 - i. List out what the critical issues are – be sure to distinguish between cause and symptoms.
 - ii. Stress test your critical issues with root-cause analysis or BPR analysis².

¹ <https://www.canada.ca/en/treasury-board-secretariat/services/information-technology-project-management/project-management/business-case-template.html>

<http://www.tbs-sct.gc.ca/emf-cag/business-rentabilisation/bcg-gar/bcg-gar-eng.pdf>

<https://www.tpsgc-pwgsc.gc.ca/biens-property/sngp-npms/ti-it/armva-bctlv-eng.html>

² Business Process Re-engineering – see Brown and Kusiak, (2006). *Problem Analysis Techniques*.

<https://www.miun.se/siteassets/fakulteter/nmt/summer-university/problemanalysispdf>

- iii. Stress test your critical issues for the risks they describe (e.g., impact and potential)
- iv. Remember: issue statements do not include solutions or background information. They are short (75 words maximum for each issue), insightful, and demonstrate a mastery of the case situation and the risks involved.
- b. Theory and business area comparison
 - i. What theories or business strategies relate to this situation and its issues? Think of these as the frame with which the case is viewed. For example, in a business ethics course is the issue describing a deontological, teleological, or virtue ethics approach? Or in a business strategy course, does the case best describe a CSR or CSV approach?
- c. Viable options and best solution
 - i. List out possible solutions based on your preparation work. Ask why the audience would consider this a viable, realistic and plausible option or solution? Does it directly address the problems that you identified?

The Case Study Paper Outline

Use the following as title headings and use your preparation materials to complete the content. Be sure to add subtitles as necessary.

1. Introduction

- Introduce your thesis statement.
 - There are two types of thesis statements – direct and indirect. Direct often begin with a stem sentence like: “This case study is (e.g., analysis, investigation, etc.) of (e.g., situation, etc.)” An indirect statement begins with the context for the issues then leads to the direct statement.
- The Problem statement.
 - One sentence that describes what the key problems are. Do NOT expand with background information or try to summarize the case study itself.
- Summarize your key recommendation and what outcome would come out from it. Thus a stem sentence might be: “The researcher found that” Or “The analysis suggested that ...”.
- On a 6,000 word paper, this should only be no longer than a ½ page in length.

2. Background and Analysis

- The purpose of this section is to supply the RELEVANT facts from the case study and your additional research. Relevant means the facts that support your problem statements, options, solutions, conclusions, and recommendations. This is not a Reader’s Digest of the case.
- Be sure to apply your “frame” for this case in this section.
- Add in your subtitles from your preparation work.

3. Viable Options

- Outline the most feasible options explaining how they address the problem. Be sure to include the appropriate business lens.
- Evaluate why you rejected these options.

4. Recommendations

- Describe and recommend your preferred option.
 - Recommendations are credible, attainable and realistic. Think about an answer: is this recommendation plausible? Financial, legal, culture, situation, and other concerns don't make it impossible.
 - Recommendations are in the power of the actors in the case to enact or take forward
 - The recommendations solve the problems stated in the introduction
 - The recommendations are shown not to have been considered or done already – or if they were done what is different in your recommendations.
- Describe how this will resolve the problems you described. What are the benefits and risks involved in this option?
- Frame the solution within the strategic environment of the case study and business frames that you have applied.
- Suggest an implementation plan. Be sure to address major capacity issues for implementation.
- Draw on your background section for evidence to support your choice.

5. Conclusion

- Summarize your key problem and the solution that resolves the issue. Demonstrate alignment with the strategic objectives of your audience.

Finalization

- Take time to proof your document. There are several online grammar and writing programs that can assist you in this effort. Also take time to ensure that there is no plagiarism in your document and materials and quotes are properly referenced.