Suggested Case Preparation

In order to succeed in a class in which case discussions are a major component, you need to carefully and thoughtfully prepare. Begin by reading the Berkeley-Haas note on cases, “Making the case method work for you,” posted on the class site. In addition, the following are suggestions that have proven to be helpful in previous classes.

- **Overall Preparation**:
  Read the case at least twice, first to obtain an overview of the facts and issues, then to record and critically assess the issues at hand. After the first reading, carefully review the questions provided below. You may find it useful to take notes during the second reading and mark-up the case to help you create a framework for discussion.

- **Questions to Consider**
  - **What’s the problem?** Common marketing problems include: should the firm enter or not enter a business area (go/no-go decisions); which area of the market should they enter (product decisions; market decisions); which customer group(s) should they target; how to defend against or attack competition; how to position a brand, whether to conduct market research, and if so what type of research to conduct, how to allocate the budget between various promotional media or sales, decisions regarding changes or continuation in distribution channels, brand names, what price(s) to charge, what type of advertising to run, media decisions, etc.
  - **What are the decision alternatives?** These are usually implicitly or explicitly provided in the case, but you should feel free to go beyond those that are given as long as you can defend your decision with sound rationale.
  - **What data or other quantitative information is available and how can it be best employed?** If a case provides data, it's likely that the case writer wants you to use that data to help formulate your conclusions. The tricky part: figuring out which data are relevant and helpful and which are less so.
  - **What are the company’s strengths and weaknesses?** Examples of areas that could be strengths or weaknesses, including: brand name, customer franchise, superior technology, costs of production, experience, suppliers, distribution channels, financials, technology, and operations.
  - **What are the environmental opportunities and threats?** These include changes in the overall environment e.g. changes in the economy, socio-political climate, customer demographics, government regulations, consumer attitudes, competitive environment and technology.
How can you assess the pros and cons of each of the decision alternatives against the backdrop of company strengths/environmental opportunities, keeping competitive considerations in mind? These include quantitative analyses such as breakeven analysis, profitability of different decisions, and sensitivity of profitability to various scenarios depending on assumptions about unknown variables such as market size and potential, as well as qualitative analyses such as fit with the company strengths, fit with existing opportunities, likelihood of competitive retaliation etc.

What is your recommended course(s) of action with supporting strategic and/or tactical rationale? What is your implementation plan? What do you think you will achieve through the plan?

A typical wrap-up question at the end of a case discussion is: What is the answer? In fact, there might not always be a single correct answer. In most case discussions there can be several viable "answers/alternatives" that are developed and supported by different participants in the class. What is important, therefore, is developing an ability to think critically about the rationale and pros/cons for each alternative.

In sum, you should analyze the situation, identify key issues/problems to tackle, identify various options available, consider the options, and decide on a strategy and persuasive supporting rationale, then outline its implementation plan. Finally, you should be fully prepared to verbally propose and persuasively defend your recommendations.

Work with your study group
After your individual preparation of a case you will benefit a great deal from discussing your analysis with your study group. In this group discussion you should listen with an open mind to alternative points of view and discern which options seem most valid, given your previous analysis of the case.