

# **A Guide to Using Marketing Cases**

**Prof. John Fahy,  
University of Limerick,  
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## **Introduction**

Though estimates vary it is said that we are exposed to up to 1,000 marketing messages per day. Behind all of this activity are marketing managers making real decisions, which will determine the success or failure of their organisations. Therefore, the actual work of the marketing manager involves making many choices and ensuring that desired actions and activities happen. It is a very real life activity. The case study aims to simulate this kind of activity. It puts the student in the shoes of the marketing decision maker, asking you to make choices and make decisions based on the information in front of you. To many this can be quite daunting but the purpose of this note is to guide you through the process of case analysis which will help you to make better decisions in both imaginary and real business situations.

## **What Are Case Studies**

In short, case studies are written descriptions of sample business situations. Those situations can be real or fictional, though in most instances they describe real organisations. They come in many shapes and sizes. For example, the marketing spotlights at the start of each chapter of *Foundations of Marketing* might be described as a short case, which illustrates a business situation and could be the subject of analysis and discussion. In contrast, some cases can be much longer and extremely detailed. Cases may focus on industries, large global organisations, small, entrepreneurial organisations, not-for-profit organisations and so on. The greater the variety of cases examined, the more the student is exposed to the richness of organisational life. In the main, the kinds of cases that the introductory marketing student is exposed to includes the following,

- *The Incident Case*: This kind of case describes some particular set of circumstances that an organisation has faced such as a crisis that has been caused by a product recall, for example. It asks the student questions like, how well did management handle the crisis and what can be learned from it, etc.
- *The Illustrative Story*: The business literature is full of stories of what organisations have done and whether these initiatives have been successful or not. The illustrative case builds on these stories, usually to depict the strategies pursued by organisations in trying to achieve the goals they have set themselves. These kinds of cases are very useful in helping us to gain insights into effective marketing practice.
- *The Puzzle & Answer Case*: These are less common but as the name suggests, they present the reader with a puzzle-type situation and ask for a solution. The reason they are unusual in marketing is that few if any marketing situations will lend themselves to just one answer.
- *The Exercise Case*: Like the illustrative story, the exercise case is very common in marketing. Its purpose is to present situations in which the student can apply the tools and concepts that they have learned.

## Objectives of Case Studies

There are different ways of acquiring knowledge but the principle underlying case studies is that of inductive learning. In other words, the aim is to develop knowledge and over-arching principles through examining and analysing individual situations. Case studies are also underscored by the principle of *learning by doing*. We know marketing is a real-life activity but few marketing courses will bring us into contact with real-life managers. The case, which simulates an organisational situation, is as close as many of us will come to real-life before we begin our working careers and by working on several cases, we build our skill sets. In summary then, the objectives of case analysis are as follows,

- To develop diagnostic and analytical skills in areas such as situation analysis, evaluation of alternatives, making choices and justifying recommendations.
- To apply the techniques, concepts and theories learned in class and from the literature to help solve business problems.
- Cases gets the students to be active rather than passive so it requires them to get out of the habit of being a receiver of concepts and into the habit of diagnosing problems and coming up with proposed solutions.
- To develop skills in critical thinking, as with cases there are no right answers and arguments need to be formed and justified.
- To develop the communications skills necessary to present case solutions either verbally or in written format.
- To develop listening skills. Much of the learning in a case study comes out of listening to other points of view and acknowledging the different perspectives that people can bring to the problem.
- To get practice in working out problems for yourself or in working as part of a team.

## Analyzing Cases

One of the great challenges of case analysis, and indeed real-life business is that all situations are different. Therefore are no step-by-step procedures for case analysis or no neat proven framework that will work in all instances. That said, there are a number of elements of good practice that should be followed when working on a case.

1. First, read the case through quickly. The purpose of this initial reading is to get familiar with the main issues in the case such as the organisation, its situation and the kinds of challenges or difficulties that it may be facing.
2. Then, either individually or in groups, read through the case carefully and note the key facts. Do not try to enumerate all the information as some of it will be more important than others. Identify the key information and issues.

3. Decide what assumptions are reasonable in relation to the situation under discussion. Remember that in business, managers rarely have all the information that they need. Sometimes it is necessary to estimate, guess and speculate.
4. Now it is time to begin the case analysis proper. The first step is to conduct a thorough analysis of the external situation facing the organisation. This might mean looking at the macro and micro environments of the organisation, looking at the information that is available on consumer behaviour and/or on competitive activity. This analysis helps to articulate clearly the challenges facing the organisation.
5. Second, it will be necessary to thoroughly analyze the organisation under study. What are its strengths and weaknesses. It may be necessary to examine in depth, the quality of its marketing management, i.e., its segmentation, targeting and positioning. Or the focus may be on its brand management, its distribution strategy, the nature of its marketing planning or whatever emerges as most critical in the particular situation under analysis.
6. Then the strengths/weaknesses of the organisation needed to be compared with the opportunities/threats in the marketplace. The goal of this phase is to clearly articulate what are the problems and/or opportunities that are facing the organisation under study.
7. The next step is to devise a number of alternative plans of action to resolve the problems or take advantage of the opportunities. It is important not to lock on to one solution straightaway but rather to look at a range of possible solutions.
8. Finally, it is critical to recommend and justify a solution. The importance of coming up with a proposed solution should not be underestimated. Business is about making choices. Too often students do very good analysis but then proposed alternatives or solutions are very weak. Be unambiguous about your choices and justify them. Don't worry about being right or wrong because remember there is always likely to be more than one possible solution. What is important is that you make a choice and that it is logically supported by your arguments. That is much more important than trying to chase some elusive 'right' answer.

### **Getting the Most Out of Cases**

From a tutoring point of view, there are four ways of dealing with cases. These are (a) lecturing a case, (b) theorizing a case, (c) illustrating a case and (d) choreographing a case (Rangan 1995). Each of these are quite different approaches with different objectives and likely results. For example, when lecturing a case, the instructor takes a class through the case analysis emphasising what he/she deems to be most important. Similarly, when theorizing a case, the instructor uses the case to convey a particular concept or piece of theoretical knowledge. Likewise, illustrating a case means it is used to show what particular organisations have done which may or may not have been successful.

But the best value can be had from cases when the case class is choreographed. What this means is that the instructor takes a leading but not dominating role as happens in the three instances described above. Also it places the onus on students to be fully prepared for the class. They must have studied the case, done their

analysis and come to their conclusions. The classroom can be a stimulating environment when different points of view are being put forward and debated. No individual is going to think of everything so a great deal can be learned from realising that you have missed certain things despite working hard on a problem. It is the instructor's job to guide the discussion without dominating it. He/she must not reject points of view but rather if the analysis is flawed, these weaknesses should be pointed out. And the onus is on the instructor to lead the class to a conclusion. A good case analysis should always lead to a thoughtful, well-reasoned conclusion with a set of action items if you were the protagonist in the case.

**References:**

Rangan, V. (1995), 'Choreographing a Case Class, Harvard Business School, 9-595-074.

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