

## **CASE WRITING THROUGH THE CURRICULUM AN INTEGRATING MECHANISM FOR THE MBA PROGRAM**

### **OVERVIEW:**

This proposal is designed to increase student integration and synthesis of topics learned in MBA courses through a comprehensive case writing project that extends through out a student's plan of study.

Students will individually select a firm during the Essential Leadership Skills course (BSAD 8060). They will research and track this firm throughout their plan of study, developing a portfolio on the firm. Instructors of MBA core courses will be encouraged to incorporate assignments/projects in their courses where students will apply course-related concepts to their selected firm. These assignments will be added to their firm portfolio.

In the capstone course, Policy, Planning and Strategy (BSAD 8800), the students will individually prepare a case study and analysis report based on their firm portfolio. The case study will focus on a description of events in the firm surrounding a specific decision made by the firm. Writing the case will allow the student to explore the situation in depth, looking at such issues as linkages and causality. The analysis report will provide an analysis of the key issues, recommendations and relevant theoretical linkages. An oral presentation of the case and analysis report will also be incorporated in BSAD 8800.

Copies of completed cases and analysis notes would be maintained in CBA for faculty consideration for adoption in subsequent offerings of their courses. Top ranked cases may be submitted to case conferences such as the North American Case Research Association's (NACRA) annual meeting or for publication in case journals such as the *Case Research Journal* or the *Business Case Journal*.

### **OBJECTIVES:**

- All students completing an MBA degree at the University of Nebraska at Omaha will conduct an in-depth study of a specific firm throughout the MBA curriculum.
- All students will individually apply course-related concepts to their selected firm, thus encouraging students to adopt a general management perspective (integrative, non-specialized) rather than focusing only on their perceived strengths.
- All students will individually create a significant written and oral integrative product rather than participate in yet another group project.
- Quality will be encouraged through a competitive review of the cases and case presentations with corporate-sponsored prizes/awards.

### **GUIDELINES:**

## **BSAD 8060—Essential Management Skills**

Students will select their firm and begin collecting information for their firm portfolios during this course. Students should be encouraged to select firms that meet the following criteria:

- Firm should be publicly held so that financial data can be obtained through SEC filings.
- The student SHOULD NOT be employed by the firm. Students could select a competitor's firm for study.
- Students may not select a firm that has been already reserved by another student. Students will retain their chosen firm during their MBA studies. Students may change firms at their option (provided it has not been previously reserved by someone else), however, they will forfeit the benefit of building their firm portfolio over time.
- The level of diversification/complexity of the firm should be taken into consideration. Firms with many SIC codes will be more difficult to study/analyze than firms with 2-3 SIC codes.
- No specific requirements should be made regarding the age/size of the firm provided that the firm files its financial reports with the SEC.

A course project/assignment should be developed for BSAD 8060 to begin development of the portfolio.

## **MBA Courses**

Where pedagogically sound, instructors of MBA courses are encouraged to incorporate course projects/assignments into their courses that require the student to apply course concepts to their selected firm, thus requiring them to further develop their firm portfolios.

Possible examples—

- BSAD 8010: Legal, Ethical & Social Environment. Students could research a legal/ethical issue faced by their firm and how the firm responded to the issue. A written report or oral presentation could be required.
- BSAD 8200: Managerial Accounting. Students could analyze the firm's financial data to develop performance reports for management.
- BSAD 8400: Marketing Policies. Students could evaluate the marketing strategies of their firm and develop recommendations for improving the positioning of one of the firm's products.
- Students should be encouraged to select their firm as a subject for course projects in other MBA courses.

The goal would be to have faculty involved with at least 4 (out of 7) core courses to incorporate an assignment/project into their course involving the student's firm. The scope of the assignment could range from a short oral presentation or written exercise to a comprehensive project at the instructor's discretion.

### **BSAD 8800—Policy, Planning and Strategy**

The major project for this course would be the development of the descriptive case and the analysis note. Individual written and oral presentations would be required of all students in the course.

#### **CASE STUDY GUIDELINES:**

- Cases will follow the guidelines for NACRA and *Case Research Journal* submissions.
- Cases will deal with issues that are of strategic importance to the firm. Strategic issues are significantly affected by elements in the firm's external environment. Strategic decisions are also defined as those that greatly change the character or direction of the firm. Strategic decisions are comprehensive in scope, involving many functional areas of the firm rather than focusing on a single area.
- The cases will provide a factual description of the events that actually happened at some point in the firm's past.
- The case will provide the basis for an analysis of the decision making process utilized by the firm.
- Case length will normally be less than 30 typed, double-spaced pages and include all appropriate exhibits etc. essential to the understanding of the case situation.

#### **SUGGESTED CASE FORMAT:**

The case will usually follow this format:

1. Opening scenario: a few paragraphs establishing the decision context for the case. Who is the decision maker? Why is this a problem? What special concerns or issues must be considered?
2. Firm background: A short relevant history of the firm and its strategies. What background information would the reader need to appreciate the situation faced by the decision makers? This should probably include financial information so that the firm's performance can be evaluated. It may also be relevant to include information about the decision makers themselves, the board of directors, etc.
3. Industry information: Provide enough information about the industry and key competitors so that external and industry environmental factors can be appreciated.

4. Decision Point: Return to the decision focus. Provide enough information so that the reader has the sense of being as well informed about the problems/opportunities faced by the firm as the actual decision maker. Don't make the decision, but leave it to the reader.

#### Best Practices in Case Writing:

- Write the case in the past tense (except for any direct quotes).
- Incorporate dialogue of decision makers to give the reader a sense of their personalities. Dialogue also makes the case more interesting for the reader. Newspaper stories can often yield good quotations from key players in the decision.
- Don't slant the case so that the reader can only recommend what the company actually did. Leave the decision open so that a variety of options may be considered.
- Charts, tables, financials, etc. should be labeled as Exhibit 1, 2 and so forth.

#### ANALYSIS REPORT GUIDELINES:

In a separate document, the student will:

- Provide an executive summary of the case.
- Identify the key issues presented by the case.
- Application of appropriate strategy tools: Provide an in-depth analysis of the key issues presented by the case. At minimum, this would include a SWOT analysis, however, depending on the focus of the case, this might include financial analysis, external analysis, competitor analysis and/or portfolio analysis.
- Application to theory: Provide a discussion of the theoretical links to the case issues with specific references to the appropriate theoretical literature. What strategic management concepts or theories could the decision makers have used to improve their decision making? Briefly describe the relevant theory or concept and then show how it could have been used by the firm. For example, would the decision maker's understanding of the situation be improved by conducting a stakeholder analysis? Would using the McKinsey 7s model improve the implementation of the firm's strategy?
- Recommendations: What should the firm do? Don't confine yourself to what they actually did, but what should they have done? Describe the strategy you feel would have the best chance for success in sufficient detail so that the reader will understand it.
- Epilogue: Write a few paragraphs telling the reader what actually happened. What did the decision maker really do? What was the outcome
- Provide a list of sources utilized in the development of the case and analysis note.

- The analysis note will normally be less than 20 typed, double-spaced pages and include all appropriate exhibits and calculations to illustrate the recommendations.