Marketing Case Analyses

Please review and diligently follow the approach suggested in the CASE ANALYSIS COACH provided in your HBS Cases e-Book. Merely reading the case will not be enough. The successful use of the case method depends on careful and thorough preparation, and active class participation. [Use the AMM case questions.Preview the document](https://montclair.instructure.com/courses/92416/files/5396289/download?wrap=1)

PLEASE NOTE:

* Case analysis is NOT a summary. You can assume everyone is aware of the information in the case, **detailed introduction is not needed**.
* PLEASE DO NOT COPY TABLES, EXHIBITS from the case as-is in your brief, negative points for excessive restatement of case facts. You are expected to use case materials in new ways to combine information, generate and present VALUE-ADDED INSIGHTS.
* Your brief should focus on identifying the main problem faced by the manager in the case and analysis of information based on readings/PPT to generate insights.
* Your analysis should be based on the information and facts provided in the case, *please do not use information from outside the case – it will make your analysis invalid*. You need to immerse yourself in the period and location of the case or you will be Monday-morning quarterbacking. The purpose of a case analysis as designed by HBS the founder of the case study method in MBA education is to put students in a real-world situation at the time it happened (similar to medical schools using cadavers). Using outside material defeats the purpose, the managers did not have the information you find today. All cases were published after the situation resolved and a determination made that it offered a worthwhile learning situation. For example, why would HBSP develop the Lady Gaga A case when we know what happened?
* More importantly, most cases with the exception of Lady Gaga are based on real companies with names masked to protect their identity! If you invest your time looking for outside information, you will miss the objective of the case.
* You are expected to embed/immerse yourself in the case in terms of the period (year the case is based on), place (the country and culture case is based in – please do not analyze a case based outside the US from the US perspective), and step into the shoes or take the perspective of the case protagonist – the CEO, CMO or marketing director. Imagine yourselves “there” in the case.

### **Format**

**Your briefs are to be a single page**, accompanied by a maximum of three relevant exhibits for **Marketing Math / Analytics**. The HBSP Case Analysis Coach provides a Case Analysis Worksheet. If your case has a Supplemental Worksheet you must use it and submit the XLS so we can evaluate it. The format must be strictly followed: 1 inch margins on all sides; 10 to 12-point font size; single-spaced within paragraphs, double-spaced between paragraphs. Identify your brief with your names, Section and the case. This information may be the top margin. The exhibits will be a spreadsheet, flow diagram or organizational chart and should be referenced from the text. They should be relevant and well made within the same format; they should contain narrative that should appear in the text itself. Your brief and the exhibits can be *team* work. Running over the one-page limit for text will lead to a substantial penalty in the grade.

*Paragraph Heading:* In one page, you do not always have enough space for side headings; in general they are not needed, but you may use running paragraph headings (as shown here) if it helps your writing.

### **Case Brief Organization Example**

If you work in marketing, your employer will likely have a “house style.” But you should start with the following structure for this course. Although it constrains your creativity, it makes it possible to grade a large number of briefs according to a common scheme.

*Introduction:* Very briefly, identify the situation and who must take what decision, for example, “Lee Wang, Marketing Manager for Pontiac, must decide whether to increase promotional spending by $1 million and if so, where to spend the additional budget.” Do not repeat case facts, such as: “Pontiac makes cars and is a division of General Motors, one of the largest US corporations.”

*Background:* You can briefly summarize your understanding of the situation: “After losing market share to cheaper Japanese imports, Pontiac needs to win back customers in the 25-35 age bracket.”

*Alternative Courses of Action:* In most business situations, there are two or three possible courses of action. Don't be afraid to choose one firmly (e.g., low price-heavy advertising) although that will rule out other options (in this case, a “luxury-good” positioning). However, this is not to say that there are no wrong answers. For example, recommending heavy promotional expenditures by a firm about to become bankrupt doesn't make sense. Think of the four elements of the marketing mix and make sure they are consistent with each other, like the pieces of a puzzle.

*Recommendation*: Avoid placing your recommendation at the end of the brief as a conventional conclusion in business; the reader may not get that far. You should make your recommendation explicitly. Do not hedge with wasted words such as “In my opinion.” Say what the executive or firm should do: “Lee should spend $1 MM on increased TV advertising in spot local TV in Southern and California markets, selecting shows with a high 25-35 female viewer profile.” Not a vague wish such as: “Pontiac should raise sales in selected markets.”

*Basis for Recommendation*: Back up your plan: Provide around three reasons why your plan makes sense, possibly including the rejection of alternate strategies. “Network TV has proved ineffective at boosting sales and a trial of radio ads was ineffective.” You must support your recommendations with detailed ***CALCULATIONS***.

*Assumptions and Uncertainties*: Outline key assumptions that you have made. Briefly discuss possible uncertainties associated with your recommendation. For example, “This assumes that the increase in awareness in the small Peoria test-market can be replicated nationally.” And, “With weak ties to the distributors, Smith co. will be vulnerable in this market if competitors decide to develop a similar product.”

*Action Steps*: What should be done today? Tomorrow? And in the next three months? Don't be vague, as in “Pontiac should rebuild its brand image.” Rather, “At the end of the first month, Lee should conduct awareness studies to measure the effectiveness of the new spot TV campaign and -if successful- should develop a new ad copy on the same theme and add dealer incentives.”

A typical request at the end of a case discussion is: What is the answer? 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 group. What is important, therefore, is an understanding of the rationale for each alternative and the pros/cons of pursuing competing alternatives.

### Exhibits

You can include exhibits such as Excel spreadsheets or organizational- or flow-charts. You must refer to the exhibit at the appropriate point in your text: “A sales increase of only 0.4 percent would completely cover the planned extra advertising costs (Ex. 2).” Sometimes you can explore possible outcomes by presenting the “worst, expected and best” cases - but do not print out endless iterations of the same idea (e.g., net profit at 0.1, 0.2, 0.3 ... 8.9 percent sales increase).

### Mechanics

Use a spell checker and carefully read through your work and make appropriate corrections. Don't have another person do this work. We want you to learn good editing skills as well as good writing.

Please review and diligently follow the approach suggested in the CASE ANALYSIS COACH (Module 1 reading/tutorial assignment) provided in your HBS Cases e-Book. The tutorial recommends use of the Case Analysis Worksheet on its first page and takes you step-by-step through the process of analyzing a case. COMPLETING THE TUTORIAL IS COMPULSORY EVEN IF THERE IS NO GRADE ASSIGNED TO IT.

IF YOU DO NOT COMPLETE THE TUTORIAL YOU PROBABLY DO NOT UNDERSTAND THE PURPOSE OF A CASE STUDY – OR HAVE WRONG ASSUMPTIONS ABOUT IT! YOU WILL LOSE POINTS.

Please use the information in case and the theoretical concepts covered in the course. If you analyzing a case allocated in M3 – I expect you to consider all concepts covered in M1-M3 and choose the “tools” that apply and will help you analyze the case.