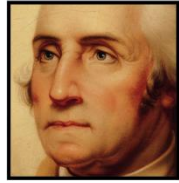


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AY 2011-12

**MBA International
Residency
The Derbi Project - SPAIN**

Rafel Lucea



THE GEORGE WASHINGTON UNIVERSITY

SCHOOL OF
BUSINESS

COURSE TITLE: International Residency– MBAD294
- The Derbi Project - SPAIN

DATES: May 11, 2009 – May 22, 2009

INSTRUCTOR: Rafel Lucea
Department of International Business
2201 G Street, NW; Fungler 401
202-994-4363
Email: rafel@gwu.edu

LOCATION AND TIME: Barcelona, Spain

COURSE OBJECTIVES

The objective of this course is to complement and give closure to the work developed during MBAD204. There are two main components to this course. The first one is to provide the students with a firsthand experience of what doing **business in Spain** is like. This is accomplished by visiting a number of companies and government institutions in Barcelona and interacting with managers from a variety of industries. The other major component of this trip consists in learning how to present a business proposal or market analysis before a real client.

STRUCTURE OF THE COURSES

The International Residency Course (MBAD204) and International Residency Trip (MBAD294) are two highly intertwined requirements of the Global MBA program. For this reason, and despite the administrative necessity to treat them as separate courses, both will be regarded as one in terms of preparation, deliverables and grading. Just to be perfectly clear: the grade for MBAD204 and MBAD294 will be the same and will depend on the joint performance of the student on both courses.

RATIONALE OF THE VISITS

The visits of this trip have been organized around four major themes. On the one hand, we will be meeting with managers from firms and government institutions that are related, in varying degrees, to the value chain of the motorcycle industry. For example, we will be meeting with logistics operators, sports events organizers, trade promotion agencies, motorcycle dealers and even other manufacturers in the motorcycle industry. The second theme will explore location-based sources of competitive advantage. In this vein we will be visiting wine and cava –the Catalan champagne- manufacturers that

have expanded their operations around the world from the tiny village of Sant Sadurní d'Anoia. We will also meet with one of the top managers of the company in charge of promoting the city of Barcelona internationally. A third theme is to experience the advantages and constraints derived from working with a team composed by members from different countries and backgrounds. This will be done by partnering with MBA students from ESADE and developing an internationalization proposal for the Titan Dessert Marathon (<http://www.titandesert.es/es/index.php>). The fourth and final theme consists in putting together and delivering the final proposal for DERBI. This will include (1) incorporating the lessons learned during the trip into the proposals developed by each team, (2) integrating the proposals of the five teams into a single proposal, (3) presenting the integrated proposal to DERBI's management, and (4) responding to potential concerns/disagreements that our client may have.

EVALUATION

Preparation of the visits	(15%)
Participation and professionalism behavior during visits	(25%)
Integration of lessons learned in the final team report	(15%)
Development and presentation of the integrated proposal	(30%)
Final reflection report	(15%)

TRIP SCHEDULE

See Annex 1

ETIQUETTE DURING VISITS

The expected etiquette for all company and government institutions visits will be business casual. Formal presentation at the client's site will be business formal. Bear in mind that Spaniards are quite dressier in business environments than what is standard in the US. Please plan and act accordingly.

PREPARATION OF THE VISITS

For each one of the visits, each team will have to prepare the form in Annex 2. This form is divided in two parts; one to be prepared before the visit and one to be completed after the visit.

By the end of Day 1 (at 6pm), each team will have to submit a completed visit preparation form –the pre-visit part- for each one of the companies that we will be visiting during the trip. By the end of Day 8 (at 6pm), each team will submit the visit preparation forms with the post-visit part of the form completed.

CODE OF CONDUCT

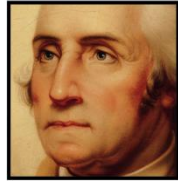
Before the beginning of the trip each student will have to sign a “Participation agreement and consent and acknowledgement of risk and release for study abroad”. This document and the associated “The George Washington University Student Code of Conduct”, describe the main responsibilities and expectations regarding appropriate behavior that will apply during the trip.

MBAD294-Derbi - PRELIMINARY TRIP SCHEDULE

	Day 0 05/11 Mon	Day 1 05/12 Tue	Day 2 05/13 Wed	Day 3 05/14 Thu	Day 4 05/15 Fri	Day 5 05/16 Sat
ACTIVITY	<ul style="list-style-type: none"> • Arrival & Check-in 	<ul style="list-style-type: none"> • BCN Tour • Derbi visit (group lunch) 	<ul style="list-style-type: none"> • Trade promotion agency • Barcelona promotion 	<ul style="list-style-type: none"> • Dealer • Sport Events Organizer • Specialized press • Harley Spain 	<ul style="list-style-type: none"> • Case competition at ESADE 	<ul style="list-style-type: none"> • Cultural activities (pick one)
FIRMS, WEBSITES (ctrl+click to access hyperlink)	<ul style="list-style-type: none"> • Hotel Fira • Bcn Airport 	<ul style="list-style-type: none"> • Barcelona Essentials • City of Barcelona • Business • DERBI 	<ul style="list-style-type: none"> • ACCIO / COPCA • Equipo Singular 	<ul style="list-style-type: none"> • Cano Group • Grupo Alesport • Harley 	<ul style="list-style-type: none"> • Titan Desert • ESADE 	<ul style="list-style-type: none"> • Human Castles + Calcotada (paid separately) • Barcelona History museum • Catalonia History Museum
Day 6 05/17 Sun	Day 7 05/18 Mon	Day 8 05/19 Tue	Day 9 05/20 Wed	Day 10 05/21 Thu	Day 11 05/22 Fri	
<ul style="list-style-type: none"> • Free 	<ul style="list-style-type: none"> • Wineries visit (group lunch) 	<ul style="list-style-type: none"> • Port of Barcelona • Logistics operator 	<ul style="list-style-type: none"> • Proposal Day <ul style="list-style-type: none"> ○ Review ○ Rework ○ Rehearse ○ Writing of client's report 	<ul style="list-style-type: none"> • Presentation of project at Derbi • Writing of final group report • Group Dinner 	<ul style="list-style-type: none"> • Check-out and departure 	
	<ul style="list-style-type: none"> • Freixenet • Codorniu 	<ul style="list-style-type: none"> • ZAL • Decathlon • Honda Spain 		<ul style="list-style-type: none"> • Dinner 		

ANNEX 2 - VISIT PREPARATION FORM

PRE-VISIT	Group name	
	Company name	
	Company website	
	Other relevant sources of info	
	Description of the Company's main activity	
	Questions (write a minimum of 5)	
	The questions you write below should help you better understand (a) how the motorcycle industry works, (b) location-based sources of competitive advantage for the Company, and/or (c) help improve your proposal to DERBI	
	1.	
	2.	
	3.	
	4.	
	5.	
	Summary of the main points of the presentation	
POST-VISIT	Reflection.	
	What did you learn that can help you improve your proposal to DERBI?	
	What did you learn that helps you better understand location-based sources of CA?	
	What did you learn about International Management more generally?	



THE GEORGE WASHINGTON UNIVERSITY

SCHOOL OF
BUSINESS

COURSE TITLE: International Residency Lab – MBAD204 – PART 2
- The Derbi Project -
SEMESTER: 2nd Quarter, Spring 2009
INSTRUCTOR: Rafel Lucea
Department of International Business
2201 G Street, NW; Fungler 401
202-994-4363
Email: rafel@gwu.edu

LOCATION AND TIME: Duques 254
9:40am– 12:10pm

OFFICE HOURS: Wednesdays 2:00 – 4:00 pm or by appointment

COURSE OBJECTIVES

The objective of this course is twofold. First, it aims at providing the students with a real international consulting experience. In particular, students should:

- Learn about the structure of the motorcycling industry and the dynamics among its main actors
- Learn how to define the scope of a project based on the requests of the client
- Learn how to assess specific business opportunities and threats derived from the current and intended geographic footprint of the client's operations
- Learn how to collect and analyze the data (from primary and secondary sources) needed to develop a sound business proposal
- Learn how to use IB and strategy frameworks for the development of the proposal
- Learn how to put together an imaginative, sound and well-supported business proposal
- Learn how to present the proposal in an effective, compelling and professional manner

The second objective is to familiarize students with the economic and business reality in Spain. Some of the aspects that will receive specific attention are:

- The make-up and characteristics of the business landscape in the country and the region of Catalonia
- Location-based sources of competitive advantage and disadvantage to local firms
- Cultural peculiarities of the Spanish and Catalan business environment; influence on cross-border business practices (including client-consultant relationships)

This course is eminently creative and practice-oriented. Students are expected to be highly entrepreneurial at finding the necessary sources of information to properly assess the current business landscape and develop a sound proposal for their client. These sources include, but are not limited to, physical and online archives, industry experts, other professors, and potential consumers of the client's products and services. Obviously, the professor will facilitate access to some of these sources but they should be viewed as a starting point rather than the only sources of information needed to address the client's needs.

Mastery of the management tools covered in the International Management (MBAD244) course as well as in the courses taken during the previous semester and a half will be assumed.

STRUCTURE OF THE COURSES

The International Residency Course (MBAD204) and International Residency Trip (MBAD294) are two highly intertwined requirements of the Global MBA program. For this reason, and despite the administrative necessity to treat them as separate courses, both will be regarded as one in terms of preparation, deliverables and grading. Just to be perfectly clear: the grade for MBAD204 and MBAD294 will be the same and will depend on the joint performance of the student on both courses.

GROUP WORK

This course intends to replicate the conditions under which a team of consultants work jointly to address their client's problems. As a result, group-work will be the norm rather than the exception. Make sure that you team-up with people you can work with in a professional manner and that from the very beginning team expectations are set. Given the amount of time that you will have to spend working together every week it is advisable that, from the beginning, all the members of the team agree on reserving specific blocks of time to plan and distribute the work, discuss and integrate it, and produce the reports and presentations as required.

All members of the team have to be ready to discuss any aspect of the group's work at any time. Similarly, the cases can be prepared in a joint manner but each student will be responsible for answering questions raised during class discussions.

READING AND COURSE MATERIAL

The cases used in this course will be accessible through the **Pearson CoursePack** website. To purchase and access your online CoursePack, you will need to do the following:

1. Go to: <http://www.xanedu.com/login.shtml?PackId=300664> (notice that this is a different link than the one used for MBAD244)
2. If you have previously registered for another CoursePack, log in. If not, click the "register" link underneath the "Students" heading. Complete the registration page, and click Continue.
3. Confirm your CoursePack selection, and click Continue.
4. Complete your billing information, confirm and click Continue.
5. After completing the purchase pages, you will be taken to your CoursePack.

Proprietary information from DERBI is posted in the course's **Blackboard website** under Files. Notice that some of this material is highly sensitive and subject to the Non-Disclosure-Agreement you have signed. Handle with extreme care.

Reports and sources of information on the motorcycling industry, our host and target countries, and the each group's deliverables are available on the **Derbi-GW project website** <http://home.qwu.edu/~rafel/derbiproject.htm> .

Materials that are available on CoursePack are *indicated in the course outline with an asterisk (*)*.

EVALUATION

Project Report & Presentation	(70%)
Class Participation	(20%)
Peer Review	(10%)

There is no final exam in this course; the ultimate measure of success is the quality of the work we produce and the degree of satisfaction of our client.

Project Report

The deliverables required for each session closely respond to the main sections in which the final report should be structured. The objective is that each week we work on one of the sections of the final report so that at the very end we only need to integrate the different parts rather than write the whole report from scratch. The following table summarizes what will be covered in each session, the deliverables and when these deliverables are due. More detailed information about the scope and objectives of each assignment will be provided before each session.

Class Participation:

Class attendance and participation is mandatory and will be evaluated strictly and on an individual basis. Your grade will depend on quantity of your participation and, most of all, the quality of your participation. Your participation grade may be negatively affected

by unprofessional behavior (e.g., inappropriate comments, doing other class work, chatting with classmates).

It will be particularly important to prepare for the sessions and extra activities in were we have external guests. These people are experts in their domains and are willing to share their knowledge with us just for our benefit.

Note that we will be covering three cases but will NOT have to turn in written assignments of these cases. These cases should be prepared thoroughly –following the case preparation guide in appendix 1- for discussion in class.

Peer Review:

At the end of the course, each student will submit a brief review evaluating each one of the members of their team as well as a reflection on their team dynamics and the lessons they have learned for future group projects. These 10 points will be awarded attending to the insightfulness of the comments and the collective assessment of each individual's contribution to the group.

OTHER COURSE POLICIES

Academic honesty

Academic dishonesty, as defined by University Policy, will not be tolerated in any form. The University's *Code of Academic Integrity* is designed to ensure that the principles of academic honesty and integrity are upheld. All students are expected to adhere to this Code. All acts of academic dishonesty will be dealt with in accordance with the provisions of this code. Please visit the following website for more information on the University's Code of Academic Integrity:
<http://www.gwu.edu/~ntegrity/code.html>

Special Needs

Any student with special needs should bring this to my attention as soon as possible, but not later than the second week of class. If you have a religious holiday or circumstance (e.g., family problem) that requires accommodation, please let me know early in the semester. I will be happy to make reasonable accommodations to facilitate your learning.

Laptop/Blackberry/Electronic Gadgets

I do not mind if you use your laptop to help you take notes or reference the Internet as it relates to in-class discussion. However, I do mind if you are surfing the web, checking email, sending text messages, or working on other class assignments. Please be respectful of me and your fellow classmates and use your laptops and other electronics judiciously. Please bear in mind that cold-calling is fair game at any point during class. If

you are unable to respond or provide a far less than satisfactory response, your participation grade will be seriously affected.

SESSION BY SESSION WORK PLAN

Session 1-March 11: Industry and client preliminary assessment

This first session is dedicated to becoming familiar with the structure of the motorcycling industry and to developing a deep understanding of our client's business.

Reading

See Blackboard and Derbi project website – Company and industry sections

Case Study:

Ducati – Harvard case 9-701-132

Case Questions:

1. How did Ducati become the second most profitable motorcycle maker in the world despite its small scale? What is the fundamental economic logic of Minoli's turnaround?
2. Can Ducati sustain its position in the sport segment? Can Honda and the other Japanese manufacturers stop its growth in this segment?
3. What strategic alternatives are available to Minoli in 2001?
4. Which alternative would you recommend? Why?

Note: pay particular attention to how the case describes the structure of the industry and the way in which it is usually segmented

Deliverables (Due March 11):

- Each group will prepare a 10 minute presentation of the main issues/findings from going through the information available in BB and the Derbi-GW project website. This is meant to be a collective information synthesizing exercise. This exercise will not be graded.

Deliverables (Due March 25 9am):

- Industry and Client situation assessment
- Client interview guide

Extra activity:

- Secondary data source seminar. Shmuel Ben-Gad, head librarian at the Gelman Library will provide a 1 hour seminar of the resources available to business students. This activity will be of extraordinary value in helping you prepare sessions 1,2, 3 and 4.
- The seminar will be held Wednesday March 11 at 1pm. Place TBD. Bring your laptops.

Session 2-March 25: Interview with the client

In this second session we will either have the client visit us or, alternatively, talk to him via videoconference. The session has two main objectives. First, develop a clear understanding of the client's problem and the specific areas that he would like for the GWU-Derbi project team to explore. The second objective is to obtain project-relevant information from the client.

Reading:

- None

Deliverables (Due April 1 9am):

- Review and expand the industry and client situation assessment from an Integration-Responsiveness framework perspective
- Project assessment memo (including work plan)

Extra activity

Presentation by Dealer; March 25, 2pm, place TBD

Session 3- April 1: Home Country Assessment

This session will be dedicated to providing an overview of the economic, political, and cultural environment of the Spanish market. Special attention will be devoted to the situation of the Spanish motorcycling industry and how it is affected by national and European level changes in regulation.

Reading:

See Derbi project website – Home country

Case Study:

Spain: Straddling the Atlantic – Harvard case 9-705-006

Case Questions:

1. How did Spain leave behind a history of civil war and internal divisions to become a prosperous European democracy?
2. What effects has Europe had on Spain? Any of them negative? Could these have been avoided? How?
3. What is your evaluation of Aznar's reforms? Are they sustainable? How do they fit with Spain's overall development Strategy?
4. Are there any lessons that we can draw for other countries trying to join Europe? (e.g.: Turkey)?

Extra activity

Presentation by Alberto Nadal, Head of the Economic and Commercial office at the Spanish Embassy in the USA. Day: April 1 Time: 2:00-4:00pm Place: TBD

Deliverables (Due April 1 9am):

- Home country assessment report

Sessions 4- April 8: Target Country Assessment

This session will be dedicated to providing an overview of the economic, political, and cultural environment of the US market. Particular attention will be placed on the state-by-state regulation affecting the US motorcycling industry.

Reading:

See Derbi project website – Target country

Case Study:

Harley-Davidson: Preparing for the Next Century – HBS case 906410

Case Questions:

1. Historically, how did Harley-Davidson manage to dominate the U.S. market? How did it do so and what were its sources of competitive advantage? And starting in the 1970s Harley-Davidson got in trouble, what changed? Internally? Externally?
2. What were the major ingredients of Harley-Davidson's transformation process?

What elements seemed to you to be the most important? What is your evaluation of the transformation process?

3. What are Harley's current sources of competitive advantage? Can these be sustained in light of the latest competitor moves? If you are Honda, where do you think Harley-Davidson is vulnerable? What is the Harley mystique?
4. What are the challenges facing Harley-Davidson as it enters the 21st century? What is your evaluation of their current strategy? What specific recommendations do you have for Jeff Bluestein? Short-term? Long-term?

Deliverables (Due April 8 9am):

- Target country assessment report

Extra activity

Presentation by Gary Pietruszewski, Mktg and Sales Vice President of Vespa USA and Melissa MacCaull, Senior Marketing Manager Vespa USA. Day: April 9 Time: TBD Place: TBD

Session 5- April 15: Preliminary Proposal Discussion

This session will be dedicated to assessing the progress that each group has made in their collection of data from primary and secondary sources. We will examine the preliminary results of the analysis of these data and proceed to present and debate the preliminary proposals developed by each team. Depending on the specific requests of the client some market research tools may be presented to the whole class. Also, guest lecturers might be invited to this session.

Reading:

TBD after session 2 depending on the nature of the client's requests

Case Study:

(Unlikely but) TBD after session 2 depending on the nature of the client's requests

Deliverables (Due April 15 9am):

- Preliminary Proposal (v1.0) – only PPTs

Extra activity

Two possible activities are being explored. The first one is a presentation by a senior

manager at Claritas, the leading firm in marketing data. The second one is a presentation by some procurement or strategy manager of a big retail firm.

Session 6- April 22: Preliminary Proposal Discussion (v2.0)

This session will be dedicated to assessing the progress that each group has made in their collection of data from primary and secondary sources. After this session, the proposal should be advanced enough that the teams can start preparing for the formal presentation and writing the final pre-trip report.

Deliverables (Due April 22 9am):

- Presentation materials
- Formal presentation

Session 7-April 29: Formal project presentation

This session will be dedicated to a formal presentation of each team's work. Each team will present their proposal to ALL of the other students in the program. Given the amount of time that will take for all teams in all projects to present, make sure you keep all of this day (morning and afternoon) reserved for this activity.

Deliverables

(Due April 22 9am):

- Presentation materials
- Formal presentation

(Due May 6 9am):

- Written Group Proposal

MBAD294- Derbi- Summary of themes per session, deliverables, grade weights, due dates and extra activities

Session Date	Theme	Deliverable	Weight on grade	Due by	Extra activity (compulsory attendance)
March 11	Industry structure Client assessment	Preliminary industry and client assessment Collective issue identification	-----	March 11 9am	Secondary research seminar by Shmuel Ben-Gad March 11 th 1pm
		Industry and client assessment report	5%	March 25 th 9am	
		Client interview guide			
March 25	Client interview	Description of the assignment	5%	April 1 st 9am	Gib Leonard – Owner of Vespa Arlington; a Piaggio Dealer Time 10am Place – Duques254
		Group Work Plan			
April 1	Home country	Home country assessment	5%	April 1 st 9am (this is not a mistake; it is the same due date as March 25 th 's deliverables)	Alberto Nadal, Head of the Economic and Commercial office at the Spanish Embassy in the USA. Day: April 1 Time: 2:00-4:00pm Place: TBD
April 8	Host country	Host country assessment	5%	April 8 9am	Gary Pietruszewski, Mktg and Sales Vice President of Vespa USA and Melissa MacCaul, Senior Marketing Manager Vespa USA. Day: April 9 Time, Place: TBD
April 15	Proposal	Proposal (v1.0) (only ppt)	5%	April 15 9am	Claritas (??) Big retail (??)
April 22	Proposal	Proposal (v2.0) (only ppt)	5%	April 22 9am	
April 29	Formal Proposal Presentation	Delivery of the report	10%	April 29 Time and location TBD	
		- Written Proposal -Final presentation material (ppt)	30%	May 6 9am	
	Report		70%		
	Class Participation		20%		
	Peer Review Evaluation		10%	May 6	
	Total Grade		100%		

MBAD204- Derbi- Summary of themes per session, deliverables, grade weights, due dates and extra activities

Scheduled Session Date	Theme	Deliverable	Due by	Extra Session Date	Extra session theme (compulsory attendance)
March 11	Industry structure	Preliminary industry	March 11 9am	March 11 th 1pm	Secondary research seminar Shmuel Ben-Gad
		Industry and client assessment report	March 25 th 9am		
		Client interview guide			
March 25	Client assessment ; Parallels with car industry	Description of the assignment	April 1 st 9am	March 25 4pm	Gib Leonard – Owner of Vespa Arlington; a Piaggio Dealer
		Group Work Plan		March 26 11am	Video Conference with Federico Musi –VP Marketing and Sales Derbi
April 1	Home country	Home country assessment	April 1 st 9am (this is not a mistake; it is the same due date as March 25 th 's deliverables)	April 1 2:00-4:00pm	Alberto Nadal, Head of the Economic and Commercial office at the Spanish Embassy in the USA.
April 8	Host country	Host country assessment	April 8 9am		
April 15	Proposal	Proposal (v1.0) (only ppt)	April 15 9am	April 16 11:00-1:00pm	Gary Pietruszewski, Mktg and Sales Vice President of Vespa USA and Melissa MacCaull, Senior Marketing Manager Vespa USA.
April 22	Proposal	Proposal (v2.0) (only ppt)	April 22 9am	April 23	Kathy van Kleek; Motorcycle Industry Council
April 29	Formal Proposal Presentation	Delivery of the report	April 29 Time and location TBD		
May 6 (upon arrival in Barcelona)		- Written Proposal -Final presentation material (ppt)	May 6 9am		

Appendix: Case Preparation Chart

Case Title:
Case Assignment:

<p>Short Cycle Process</p> <p>Who: Name Position</p> <p> Issue(s)</p> <p>What:</p> <p>Why:</p> <p>When:</p> <p>Long Cycle Process</p> <p>A. Issues</p> <p><u>Immediate</u></p> <p>1.</p> <p>2.</p> <p>3.</p> <p><u>Basic</u></p> <p>1.</p> <p>2.</p> <p>3.</p> <table style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <tr> <td></td> <td></td> <td colspan="2" style="text-align: center;">Importance</td> </tr> <tr> <td></td> <td></td> <td style="text-align: center;">Low</td> <td style="text-align: center;">High</td> </tr> <tr> <td style="text-align: right;">Urgency</td> <td style="text-align: center;">Low</td> <td style="border: 1px solid black; text-align: center;">I</td> <td style="border: 1px solid black; text-align: center;">II</td> </tr> <tr> <td></td> <td style="text-align: center;">High</td> <td style="border: 1px solid black; text-align: center;">III</td> <td style="border: 1px solid black; text-align: center;">IV</td> </tr> </table> <p>B. Case Data Analysis</p>			Importance				Low	High	Urgency	Low	I	II		High	III	IV	<p>Long Cycle Process (cont'd.)</p> <p>C. Alternative Generation</p> <p>1.</p> <p>2.</p> <p>3.</p> <p>D. Decision Criteria</p> <p>1.</p> <p>2.</p> <p>3.</p> <p>E. Assess Alternatives</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: right;"><u>Advantage</u></td> </tr> <tr> <td style="text-align: right;"><u>Disadvantage</u></td> </tr> </table> <p>1.</p> <p>2.</p> <p>3.</p> <p>F. Preferred Alternative</p> <p>G. Action/Implementation Plan</p> <p style="text-align: right;"><u>Timing</u></p> <p>Who</p> <p>What</p> <p>When</p> <p>Where</p> <p>How</p> <p><u>Missing Information and Assumptions</u></p>	<u>Advantage</u>	<u>Disadvantage</u>
		Importance																	
		Low	High																
Urgency	Low	I	II																
	High	III	IV																
<u>Advantage</u>																			
<u>Disadvantage</u>																			

Modified from Mauffette-Leenders, L. A., Erskine, J. A., & Leenders, M. R. (2007). *Learning with cases* (4th ed.) London, Ontario: Ivey Publishing.

Short Cycle Process		Long Cycle Process	
Purpose	Get a good feel for the case	Purpose	Analyze and solve the case
Step 1	Read opening and ending paragraphs	Part 1	Read the case
Step 2	Who? What? Why? When?	Part 2	Analyze the case
Step 3	Quick look at case exhibits	Step A	Define the issues
Step 4	Quick review of case subtitles	Step B	Analyze the case data
Step 5	Skim case body	Step C	Generate alternatives
Step 6	Read assignment questions and reflect	Step D	Select decision criteria
		Step E	Assess alternatives
		Step F	Select preferred alternative
		Step G	Develop an action/implementation plan

Step A Define the Issues

Immediate: The specific decision, problem, challenge or opportunity faced by the decision maker

Basic: Larger, more generic issues related to conceptual content and design of this class

Importance: Is the issue of strategic importance to the organization? Could it have a major effect on the company?

Urgency: Is this decision critical and everything has to be dropped, or can it wait for later?

Step B Analyze the Case Data

Review the exhibits and other data provided in the case. Consider causes and effects, constraints and opportunities, and qualitative and quantitative analysis facing the issues you have identified. Most cases require some analysis.

Step C Generate Alternatives

Develop a number of ways to address the issues of the case. Consider the constraints and opportunities from your data analysis as well as any relevant theories or concepts from class. Alternatives should be reasonable and plausible in the current context of the case.

Step D Select Decision Criteria

Before choosing one or more of your alternatives, define the criteria against which you want to compare all alternatives. These can be qualitative or quantitative in nature. In selecting decision criteria, keep in mind the objectives or strategy of the organization as well as your own sense being in the shoes of the decision maker.

Example decision criteria: profit/cost, ease of implementation, competitive advantage, quality, quantity, motivation

Step E Assess Alternatives

Assess the advantages and disadvantages of each alternative using the decision criteria you've chosen. Evaluate the pros and cons and select the best course of action. Consider the short versus long term implications and anticipate outcomes (best, most likely, worst possible).

Step F Select Preferred Alternative

The ultimate point in case analysis is to address the issues and make a decision.

Step G Develop an Action and Implementation Plan

Your action plan must answer 5 basic questions: who, what, when, where, and how? Refer back to your analysis and focus on the actions necessary to produce the advantages/pros and avoid or minimize the disadvantages/cons.

Missing Information and Assumptions

At times you may feel like you do not have enough information to assess the situation. If you think you need more information consider: (1) What information do I really need? (2) Why do I think it is critical? (3) Where do I think this information is located and who has it? (4) How much time/money will it take to produce it? (5) If provided, what difference would it make? If there is missing information you wish you had or if you have made any assumptions (e.g., something about the context, financial position of the organization), note it here.

Modified from Mauffette-Leenders, L. A., Erskine, J. A., & Leenders, M. R. (2007). *Learning with cases* (4th ed.) London, Ontario: Ivey Publishing.