

HOW TO...

DESIGN A GREAT CASE STUDY

Case studies are a very versatile training exercise and can be used in a wide range of courses: Whether you design them simply to generate discussion, to test problem solving, or to build a whole day around, the more realistic they are, the better the learning will be.

A simple case study can be used to simply generate discussion around a specific topic. For example, you could describe an incident at work and ask delegates to decide how they would manage the situation.

You can write a case study based on a real-life example, where there is a 'right' answer (or at least real information to discuss) allowing people to learn from others' experiences.

You can even write an extended case study that builds over a whole workshop (or even programme) that brings in many different aspects: planning, people management, commercial decision-making etc. These work fantastically well in management development programmes where everyone does (more or less) the same job.

The key to writing a great case study is to keep it clear and relevant, but also to make it feel real. Here's how I do that.

1. **Have a clear purpose** - The case study must have a clear objective/issue that needs to be focused on, otherwise it will lose its value. Whether that is to recognise instances of bullying, or to identify business opportunities, the primary purpose must be clear in your own mind.
2. **Visualise the scene** - When you know what you will focus on, visualise how this would look in reality. What do people say, do and feel? What behaviours do they exhibit? Imagine your characters are real and you are observing this incident/team. Look for evidence that you can present. Write this down.
3. **Be specific** - Even for discussion starters, case studies need to have some specific information in them. This may be sales figures, performance ratings, customer satisfaction figures or simply just actual words that can be quoted. Without concrete information, discussion will go off at a tangent as everyone interprets the information differently. Specific information provides a fixed point that should be the same for everyone.
4. **Personalise it** - Give your characters names and a back story. The more you can bring a character to life, the easier it will be for delegates to analyse the situation, reach reasonable conclusions and suggest appropriate action. Even use photos if you can. If using extended case studies, you can add more information at key stages to gradually add layers of complexity, or even move the action on 3 months (or similar).

5. **Ask specific questions** - A well-written case study can lead to dozens of appropriate conversations, but to stop people from focusing on the wrong things and going off at a tangent, provide clear direction about what you want them to do and how. You can even use it as a lead in to another activity. For example, "Having analysed the strengths and weaknesses of the branch, prepare a 10 minute presentation to give to your Regional Manager who is visiting next week".
6. **Get it checked** - If you aren't an expert in the topic, make sure that you have a) provided enough information for delegates to answer the questions you have set and b) that the information is accurate. When creating HR-based or commercial case studies, I always seek the assistance of an SME at the start and end of the case study design.
7. **Add trainer notes** - Even if you will be running the exercise yourself, you may forget some of the key learning points, so always create a trainer version with the main issues spelt out (and the evidence that links to this), along with a 'model' answer. Remember though, that during the exercise, delegates may see other issues/opportunities that are valid. A model answer should never be wrong, but it may not be complete.