How should I approach it?

Investigating and writing up a report will require the completion of specific stages. You will need to timetable sufficient time to complete each stage, but also be aware that some stages are revisited while you are analysing the case and writing the report. Thinking and writing becomes a cyclical process.

Stages essential for analysing and writing a case study report may include:

1. Define the task

Your first step is to read the case and all the instructions for the assignment.

Use the checklist as a guide. You can print out this checklist to record your definition of the task. You may find it helpful to compare and discuss your understanding of the task with other students or colleagues. Try to visualise all the elements of the problem by using mind-maps to chart the main issues on a large piece of paper.

Checklist for defining the task

<table>
<thead>
<tr>
<th>Question</th>
<th>Your comments</th>
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<tbody>
<tr>
<td>1. What is the context/background of the case study? (eg. the type of industry, location, who requested the report)</td>
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<tr>
<td>2. What appears to be the problem? (Read the case and summarise in your own words what you initially understand to be the situation/problem/risks etc…)</td>
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<tr>
<td>3. What questions or instructions have been given to guide your analysis of the problem?</td>
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<tr>
<td>4. What tools will you use for your analysis? (mind-map, SWOT, PEST, matrix, template, computer program etc…)</td>
<td></td>
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<tr>
<td>5. What else do you already know about this situation or this type of problem?</td>
<td></td>
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<tr>
<td>6. What else do you need to know?</td>
<td></td>
</tr>
<tr>
<td>7. How will the report be presented? (Due date, length, essential sections, conventions, presentation)</td>
<td></td>
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</tbody>
</table>

2. Consider which theories and analysis tools may apply to the situation

Your course notes, text books and readings should indicate the appropriate methodology for your case study analysis.

Identify the problems

In your initial analysis you should identify the problems (issues/risks etc) inherent in the case. Read to uncover the
organisation’s history of success and failure in relation to the case, the communication processes that are occurring, and relevant current strengths and weaknesses of the organisation or its activities that relate to the case.

A useful technique here is to create a mind-map of the situation, the processes and problems or issues. Use the mind-map to separate the problem elements and to note the most important and their relationships.

In your notes, document the causes and consequences of the problems highlighted in the case and also your preliminary ideas for solutions. Be prepared to discover more problems and solutions as you continue your analysis of the case!

Apply analysis tools

There are many tools available for analysis in the management and engineering fields but you need to evaluate which tools would best apply to your assessment of the issues/problems / risks etc. If you are unsure about which tool to use, read the rationale and purpose of each tool and discuss the options with your colleagues and course facilitator.

Document your results and ideas

It is important to create a complete set of notes that will be useful to refer to when writing up the case study report. For this reason record your findings and your own thoughts on the case. Also clearly document any testing, calculations or specifications that relate to your investigation of solutions as well.

3. Make recommendations and form conclusions

Make Recommendations

Recommendations are a clear statement (in text and/or table format) of what action should be taken to minimise, solve or remove the problems being investigated. Recommendations usually require a detailed action plan for implementation of a solution or a range of solutions depending on future events/scenarios.

According to Jarvis (2002), "for each part of your solution ask:

- Will it work - why - what could possibly go wrong?
- Who will do it, are they capable, who else might be, who might be block?
- When- timing-sequence?
- How and how much –cost it out- where are the pay offs/savings?"

Form conclusions

Conclusions are drawn from your analysis and assessment of the situation. You usually consider must and desirable objectives. Also consider the limitations of your recommendations based on your testing of solutions and original assumptions that had to be made in the case.

4. Write the report

This section provides some advice on the process of writing up your report.

Plan the report

Before you begin to write the report, it is essential to have a plan of its structure. You can begin to plan the report while you are investigating the case.

First, prepare an outline (in list or mind-map format) of the main headings and subheadings you will have in the report. Then add notes and ideas to the outline which remind you of what you want to achieve in each section and subsection.
Use the outline to help you consider what information to include, where it should go and in what sequence. Be prepared to change your outline as your ideas develop. Finally, the outline headings and subheadings can be converted into the contents page of your report.

**Schedule your writing time**

Prepare a schedule for writing and editing the sections of the report. Allow some extra time just in case you find some sections difficult to write. Begin by writing the sections you feel most confident about. Preliminary sections (executive summary, introduction) and supplementary sections (conclusions, reference list and appendices) are usually prepared last. Some writers like to begin with their conclusions (where the writer's thoughts are at that moment) or the methodology (it's easier to write about your own work).

**Analyse your audience**

In writing a case study report in your course, the report is often intended for an imaginary person so you need to make sure that your language and style suites that person. For example, a report for senior management will be different in content and style and language to a technical report. A report to a community group would also be different again in content, style and language. Audience definition helps you decide what to include in the report based on what readers need to know to perform their jobs better or what the reader needs to know to increase their knowledge about your subject. These notes on audience analysis are adapted from Huckin and Olsen (p1991)

1. Who will read it and why?
2. What are the readers needs and goals?
3. How do I make communication clear for managers?
4. What might be the readers preferences or objections to the report?


- **Who will read the report?** Think about all the uses of the report and where and when it would be read. Reports written within an organisation may be read by different people and different departments; for example, technical and design specialists, supervisors, senior managers, lawyers, marketing and finance specialists.
- **What are the readers' needs and goals?** Each department or unit in an organisation has its own needs and goals. Understanding the different perspectives can help you decide how to communicate persuasively to these groups. For example while design engineers may prefer to develop new or alternative design to show progress in their field, the marketing specialist may prefer that the organisation imitate a known successful design to save time.
- **How do I make communication clear for managers?** Communication must be accessible and useful to busy managers as they will primarily seek important generalisations. This has implications for the report's structure, the amount of orientation or background information provided and the level of technical language used. An executive summary, introductions to new sections and concluding summaries for major sections should be included in the report.
- **What might be the readers' preferences or objections to the report?** You may need to address the significance and benefits/limitations of your recommendations from a number of readers' perspectives in the report. You may also need to consider compromises as a way to acknowledge potential conflicts or criticisms of your recommendations or solutions.
Prepare a draft report

Writers rarely produce a perfect piece of text in their first attempt so a number of drafts are usually produced. Careful planning and editing will ensure a consistent professional standard in the report. You will need to do the following:

- **Revise the task often**
  
  Do this by keeping both the reader's needs and the report's objectives in mind as you gather information, take notes and write sections of the report.

- **Be selective**
  
  Do this by taking clear notes, which include the information gathered and your thoughts about the usefulness and the implications of this information. Review your notes to decide what is essential information to include in the report.

- **Create a logical structure**
  
  Use your contents page outline to decide where information will go. Within each section, plan the subheadings and then decide on the sequence of information within these.

  Check that your writing flows and that your ideas are supported and plausible. If you are not sure what to look for, here are links to advice and activities on report organisation, cohesion and evidence.

  Ensure that all your figures and tables communicate a clear message. Show a colleague your visuals to check how they will be interpreted or 'read'.

- **Edit, edit, edit**
  
  For first drafts, a word processor's spell checker and grammar checker can be useful however, do not rely solely on these tools in your final edit as they are not perfect. Errors will be overlooked or even created by these programs! The best ways to edit are to read a printed copy and where possible get a colleague to read and give feedback.

  Here is a report checklist that you can print out: **CHECKLIST**

5. Prepare the reference list

The reference list is a list of all the sources you refer to in the report. If you do not reference sources of information, your assignment could be failed. As you read and take notes remember to collect the following information so that you can easily and quickly assemble your reference list.

| Books/Journal Articles | Electronic Media | Standards |
Further advice on the conventions for formatting reference lists and 'in text' references can be found at The Learning Centre's online resources.

6. Prepare cover/title page

Check your course requirements on the content and layout of the title page. As a general rule include the following:

- Institution the authors are affiliated with: eg UNSW School of Safety Science
- Title of the report

Eg "BHP Billiton Risk Assessment: Strategic Political Risks to BHP’s Operations In Angola".

- Author/s names (+ student numbers)
- Course name and code
- Date document was submitted

7. Final edit

At this stage it is best if you can leave the report for a day or so before conducting a final proof-read. This assists you to approach your report as a 'reader' rather than as the 'writer' so you will more easily see errors. You should expect to spend a couple of hours on this task.

1. Reread the assignment guidelines so the task is fresh in your mind. Read the whole report to check that there is a logical structure to the whole report.
2. Check each section of the report (including your executive summary, introduction and conclusion) for content and structure. Note changes to make in the sequence of sections.
3. Note (highlight) changes you wish to make within sections (delete, simplify, expand, reorganise). In particular look closely at transition sections, figures and tables, sentences, referencing conventions and document formatting.
4. Read through the report and make changes as required.

Here are some editing activities for you to try!

See next: How is a case study organised?