Guidelines for Case Preparation

This course involves both “informal” and “formal” case presentations. Informal presentations require the same sort of analysis as formal presentations, but are conducted from your seats and do not involve a written submissions.

Informal (Review) Cases
Each student is individually responsible for preparing cases each day for class discussion. (However, students may work in teams.) The purpose is review, in order to prepare for the formal presentations; the emphasis is on analysis. They are not graded directly; performance is evaluated by examination.

Formal (Graded) Cases
• Students will form teams of three to four (TBA). If individuals cannot form their own teams, they will be assigned arbitrarily by the instructor. All members of a given team receive the same grade for a presentation.
• Cases are assigned to teams randomly (by drawing) and are presented in the same order as the review cases.
• The essential characteristics of a presentation are clarity and brevity. Concentrate on the essentials; don’t get bogged down in the nitty-gritty, but be prepared to support generalities with concrete, specific details.
• Aim your presentation at your (hypothetical) boss, who may be somewhat familiar with the subject, but who, in any case, will use it as the basis for a decision in the near future.
• Grades depend on the quality of both the financial analysis (content) and the presentation itself (style), in equal measure.

Presentations
• Formal presentations must be prepared and presented by teams on the dates assigned. All others in the class should also read the case and be ready to discuss the it and the presentation. (All must attend.)
• Any team member(s) may conduct the actual presentation. (You need not take turns.) Conduct yourselves in a brisk and professional manner, as if in a real business presentation. Dress the part.
• Address all questions, completely. Failure to do so will reduce your grade.
• Organize the presentation by task (or process) or as a narrative. Avoid the Q&A format (Don’t read the case!).
• Anticipate questions from the audience, including the instructor. (Expect to be interrupted, possibly heckled.)
• Support presentations where appropriate with overhead transparencies or electronic exhibits for outlines, tables, and graphs. (This is a low-risk way to learn the software. Further, failure to exploit the available technology will reduce your grade.) These materials should be relevant to the case.
• Provide everyone in the audience with copies of any slides, handouts or other materials. Further, provide the instructor with a copy of their full presentation beforehand, including analytical materials on disk.
• Format for presentations:
  • You need not reproduce narrative text, e.g., background, problems(s). Just list essentials in the outline for your speech (in bullet charts, for example).
  • Your supporting exhibits (tables, graphs, etc.) should be legible to all: use a spreadsheet program (and large type) to format them for projection.
  • Be sure to include:
    • a title page, with the case title, student names(s), date, etc.
    • a brief, relevant introduction to the case, in your own words. Do not quote the text of the case!
    • a specific statement of problem(s) or issue(s) and their relative importance (if more than one).
    • discussion and justification of analytical techniques employed; note any non-quantifiable factors.
    • supporting calculations, diagrams, etc, as necessary. (Use a spreadsheet.)
• Proofread! Failure to do so will reduce your grade.
• Rehearse! Failure to do so will reduce your grade.