



Case Study: what does good look like

HOW TO STRUCTURE YOUR REPORT

Remember that in your report, you need to cover all of the four skills that are being assessed in the Case Study, namely:

- Assimilating and using information (A&UI)
- Structuring problems and solutions (SPS)
- Applying judgement (AJ)
- Conclusions and recommendations (C&R)

So, when planning your report structure – what does good look like?

HOW TO PLAN THE STRUCTURE OF YOUR REPORT

A key part of your planning is of course to plan what your report will look like – it's structure.

There are many ways that you can plan and you may already have a personal preference. Some people like to use spider diagrams or mind maps. You may want to plan using the four columns of the marking key. The marking key is covered in article: 'How the Case Study is marked'.

However, applying judgement (AJ) is generally the skill area where students struggle and that tends to have the lowest pass marks. This isn't surprising as it's pretty difficult to deconstruct your thought process and actually demonstrate your judgement under exam conditions.

So what can you do? If we look at the skills that are included under applying judgement in the Case Study study manual, you will see that they are:

1. developing your analysis, making links, and evaluating key points
2. appreciating bias and demonstrating your professional scepticism
3. assessing business trust and ethical issues.

In many ways, it can be easier to focus on making sure that you demonstrate these three skills rather than trying to work out under the pressure of the exam how to apply judgement.

Using paragraphs in your report

Each paragraph in your answer should consist of three parts:

1. The fact or piece of data in other words, the subject that you're discussing
2. The first level of your commentary in other words, this is what's happening
3. Your links and/or your evaluation points – these develop your commentary by continuing 'this is because', or 'this means that'.

How much do you need to write?

The final objective of your planning process is to identify how much you need to write. You need to write enough to get 50% competent grades for each requirement but not so much that you overrun on your time plan.

Remember, you only have to do enough to get a competent grade, SC (sufficiently competent) or CC (clearly competent). And there's no such thing as a super CC grade so all your extra work however good will be wasted.

There are four parts to each of the exam requirements plus your conclusions and recommendations.

You don't have time to address each of the four parts to the same level of detail so your first decision when planning is to choose which parts you're going to write more on and which you're going to write less on.

Once again, by practising this repeatedly in your mock exams you will become comfortable making these kinds of decisions under the pressure of a live exam.

Good quality planning is crucial to passing the Case Study exam. From my work both as a senior examiner and as a Case Study tutor, I believe that the following areas are critical to passing the exam:

1. **You need to have good business awareness.** This means that you need to have a good understanding of how businesses work and be up-to-date with what's going on in the business world. Once the live AI is published, you need to brief yourself on the business news and ethical issues for the particular industry and economy, the major events in the relevant economy, the major issues keeping CEOs awake at night, and how companies are dealing with the current economic environment.
2. **Time.** You need to spend sufficient time analysing the AI and applying your business awareness to it. **There is no shortcut to this and you have to put the effort in.** If you don't know how the company's business well enough, there's no way you can pass.
3. **Decisions.** You need to make good consistent decisions regarding what you're going to write about and how much you're going to write for each bit. This requires a real understanding of how the Case Study assessment works.

The examiners will give you clues on what they want you to write about. You need to find these clues, interpret them and then give the examiners what they want.

4. **Planning process.** Have a really good planning process that consistently delivers a good enough answer in the time available, ideally 15 to 20 minutes for each requirement. You have to practise using this over and over again, so that when you go under exam pressure, you know exactly what you're going to do once you've read the exam requirements and the exhibits in the exam.

I've given you a lot of ideas on how to develop your AI preparation and plan for your Case Study exam. You need to take ownership of the company's business as if it was your own business. You'll need some time to create and adapt your AI notes and practice using them in mock exams. Make sure you do this as it's one of the best ways to develop your confidence in your Case Study process.

Finally, I wish you all the best in your Case Study exam.

Produced for ICAEW by Neil Russell, Programme Director at Training-by-EOS, tutor and former Case Study senior examiner.