



RULES FOR CASE ANALYSIS AND DISCUSSION

Principles of Management

2024/2025

Agenda

- 1. Case analysis:** structure, rules and recommendations;
- 2. Case discussion:** structure and methodology;
- 3. Practical exercises** with the methodology of case discussion.

1. Case analysis



Fonte: <https://unsplash.com/s/photos/group-analysis>

1. Case analysis

- The case analysis consists of:
 1. a **written report** analyzing/describing a company based on a chapter/topic of the theoretical subject (the company is chosen by the Students);
 2. an oral presentation of this analysis to the class.
- To complete this work, students will be required to... **After forming groups:**
 1. Conduct a **written report**(Word) about the company reviewed, with a maximum of **2,500** words (Cover, table of contents, references and attachments, not included).
 2. Prepare a **presentation** for the class and the Professor (e.g., Powerpoint) lasting between 15 and 18 minutes(1 minute tolerance maximum).

Note: The written report, with the case analysis, must be placed in Teams **by the date and time indicated in the case planning** (see slide 30).

1. Case analysis

- Additional information:
 - All files placed by the group in Teams must be named "PoM_ClassXXX_CaseX";
 - For instance: **PoM_ClassM01_Case1**.

1.1- What is case analysis?

The resolution of a case study presupposes:

- Preparation of a **written report** with an organization's analysis on one or more topics of the syllabus of the course;
- **Oral presentation** about the analysis of the case (Duration = 13-15 minutes);
- **Discussion of another group's analysis/report** (Duration = 5-6 minutes);
- **Questions and Answers (Q&A)**: Professor asks questions about the presentation and discussion to specific Students (Duration 5 minutes).
[i.e., Every student needs to have a clear understanding about everything that was done in the groupwork.]

Example

- The **objective** of the case is to characterize the strategic management (**example**) of an SME in the cork sector(**example**) taking into account the syllabus of the Course Unit;
- The main source of information will be an **interview** and (if any) the **Official Company Page** on the Internet, and other sources may be used, such as:
 - Academic studies;
 - Publications of the company or other entities;
 - Press Articles;
 - Etc.

1.2- Evaluation criteria

1. Written report (15%)

- Information collected – correspondence with the requested topic, sources and resources used; Statement on the use of AI tool(s).
- Link between class concepts and information collected;
- Critical perspective or exceptional and relevant contribution to the work;
- Quality of the written report – literacy and style, organization, bibliographic references.

2. Oral presentation (15%)

- Structure, clarity, graphic quality, posture, diction, modeling, respect for time.

3. Discussion (10%)

- Clarity and organization of discussion, posture and **correction with colleagues**, respect for time, understanding of the topic and contribution to exploring different perspectives.

1.3- Sections of the report

(1) Cover

(2) Introduction

(3) Company Presentation

(4) Development

(5) Conclusion

AI Tool Usage Disclosure

References

1.3- Sections of the report (1)

- **Cover**
 - Title;
 - Identification of the Course Unit;
 - Class;
 - Students;
 - Academic year;
 - Professor of practical classes.

1.3- Sections of the report (2)

- **Introduction (1 page)**
 - Research Context and Object;
 - Main questions that the study will aim to answer;
 - Foreshadowing of the following text.

Note: It is expected that the introduction will be about one page long, establish the link with the current and relevant topic and make a reference to the Course Unit.

1.3- Sections of the report (3)

- **Company Presentation**

- History;
- Products;
- Markets;
- Size;
- Etc.

1.3- Sections of the report (4)

- **Development** (i.e., a development-related title – do not name it development!)
 - Answering assignment Questions;
 - Presented relating the theoretical body and the empirical material (**do not have a first part with all the theory and another with information about the company, but rather a constant integration of the two**);
 - The general idea here is to describe the relevant company's characteristics and activities through the framework(s) proposed in this course and presented in its main reference (i.e., book and respective slideshows);

Notes: If you include any figures or tables, ensure they are appropriately sized (consistent with the text size), specifically referenced in the text body (i.e., indicating when and why the reader should visualize this information), and properly titled, numbered, and sourced.

1.3- Sections of the report (5)

- **Conclusion**

- Synthesis of the answers/key ideas related with the case (already explained);
- Warning: do not include new ideas!
- Highlight the contribution of the work to the knowledge on the subject.

1.3- Sections of the report (6.1)

- AI Tool Usage Disclosure

1. Transparency and Disclosure

Acknowledge AI Contributions: Always disclose when and how AI tools were used. This includes specific tasks such as brainstorming ideas, drafting text, refining language, or providing feedback. This helps maintain academic integrity and transparency.

Cite AI Tools Properly: Treat AI tools like any other source. If you've used AI to assist with research, writing, or problem-solving, cite the tool in a way that aligns with your institution's guidelines or the course requirements.

2. Originality and Critical Thinking

AI as a Supplement, Not a Replacement: Use AI tools to enhance your work, not replace your critical thinking and analysis. For example, you can use AI to organize ideas or refine language, but you should always ensure the core arguments and concepts come from your own understanding.

Avoid Over-reliance: Limit your reliance on AI-generated content. While AI can help improve the quality of your writing, it's important to contribute your own insights, analysis, and conclusions, particularly in management, where context and nuance are key.

3. Accuracy and Fact-Checking

Verify Information Provided by AI: Always double-check any facts, figures, or citations provided by AI tools. AI models sometimes produce outdated, incorrect, or fabricated information. It's your responsibility to ensure accuracy in your assignments.

Cross-check AI-Generated Ideas: If AI suggests management theories, strategies, or examples, cross-reference them with reliable academic or industry sources to ensure their validity.

4. Ethical Data Use

Avoid Inputting Sensitive Information: When using AI tools, do not share confidential, personal, or proprietary data—either from case studies or real-world business contexts. Be mindful of data privacy, especially in management scenarios involving sensitive organizational information.

Limit Personal Information: Avoid disclosing personal or identifying information about yourself, your classmates, or any organizational data in the AI prompts.

5. Academic Integrity

Plagiarism Awareness: Do not use AI tools to generate content verbatim without proper acknowledgment. Paraphrasing or directly using AI-generated text without citation can be considered plagiarism, even if the text was generated specifically for you.

Follow Institutional Policies: Familiarize yourself with your institution's policies on AI usage in coursework and ensure you adhere to them. Different institutions may have specific guidelines on how AI can or cannot be used.

6. Develop Your Analytical Skills

Use AI to Enhance Learning, Not Shortcut It: Use AI tools as a means of enhancing your understanding of management concepts, not as a shortcut for avoiding critical analysis. For instance, AI can help you understand complex theories, but it's important to reflect on these theories in your own words and apply them to real-world management situations.

Practice Ethical Decision-Making: Since management is about decision-making, use AI tools to simulate ethical dilemmas or case studies, but always think critically about the decision-making processes AI models suggest, and reflect on their ethical implications.

Examples of Ethical AI Use in Management:

Idea Generation: Using AI to brainstorm innovative management strategies or leadership styles, but refining and critically evaluating those ideas yourself.

Writing Assistance: Using AI to improve the clarity or structure of your writing, while ensuring the argument and analysis are your own.

Data Analysis: Leveraging AI to assist in organizing or visualizing data (e.g., spreadsheets or financials), but verifying the accuracy of outputs and interpreting results yourself.

By following these practices, students can leverage AI tools like ChatGPT effectively and ethically while honing their critical management skills.

1.3- Sections of the report (6.2)

- **AI Tool Usage – ISEG's recommendations**

Recommendation 1: Explain to the students that the functioning of GAI tools are not governed by ethical principles, and thus there is no distinction between right and wrong, nor true and false. Generally speaking, these tools only collect information from databases which are readily available on the internet, and thus they also learn from and enhance any cognitive bias found in this source. Accordingly, it is essential that users of GAI critically analyse all the results it generates and compare them with other sources of information. Nevertheless, it should be emphasised that GAI assists reflection about learning material.

Recommendation 2 Convey to students the need to view the use of GAI tools as learning mechanisms, rather than a generator of content production. GAI tools are simply support mechanisms, which are complementary to the author's work, and should never be equated as being co-authors. Accordingly, the overall responsibility for content always rests with the student. All intellectual property rights and obligations apply solely and exclusively to human beings, either individually or collectively, and cannot be passed on to mechanisms or to their manufacturers.

Recommendation 5: Require students to declare exactly when they employed GAI tools for their work or stages of research, e.g.: writing, translation, synthesis of papers, code generation, image manipulation, etc., as well as their responsibility vis-a-vi possible copyright infringement.

Recommendation 7: Explain to students the importance of always behaving ethically in academia, especially with regards plagiarism and copyright infringement, in line with ISEG's Mission and Vision and also the provisions of the preambles to the Disciplinary Rules and Regulations governing Universidade de Lisboa students, and also Universidade de Lisboa's Code of Conduct and Good Practices.

[Source: ISEG's Pedagogical Council recommendations, No. 2/PB/2023]

1.3- Sections of the report (6.3)

- **AI Tool Usage – Professors' additional recommendations**

Ask your professor: If you have any doubts regarding the ethics related to this issue (or any other issue), please discuss your questions with your professor in advance.

Ask your colleagues: Make sure to discuss in advance with all your group members what their responsibilities are and how they are supposed to complete their work. Ethical use of AI included!

1.3- Sections of the report (7)

- **References**

- Write using proper referencing criteria! (use [APA referencing style](#))
- Do not cite wikipedia, blogs, and other sources of similar characteristics (only in very exceptional situations).

Note: Academic writing takes longer than non-academic writing. Start early! This is primarily due to the required rigor in choosing the right words and concepts, as well as the need for proper referencing. The inclusion of in-text citations significantly increases the time required.

Advices (1)

- Keep up with the theoretical and practical classes;
- Identify the relevant **chapters and concepts**, how they can be related and the depth and scope I should attribute to each topic;
- **Think ahead about the structure of the work**, in particular the development part;

Ask yourself the following questions:

- How is this company a good or bad example of the subject matter in relation to the proposed case study?
- Should we cover more topics, risking superficial analysis of the company, and not adding enough value to the theoretical approach?
- Should we focus on just a few topics in depth, at the risk of not providing a comprehensive picture of what the company does in relation to this topic?

Note: Establish collaboration with the targeted company as soon as possible! Your professor can ask you for the identification and contact of the interviewee(s) to confirm the contact was established and/or to confirm any information in your report. If you cannot find a relevant connection to obtain the required interview, you can ask to your Professor (practical sessions) to help you find one.

Advices (2)

- Pay attention to **deadlines** – plan your tasks;
- Start from the indicated **sources** (i.e., Book, Interview, Company's website) and proceed to add other credible sources (without getting lost!);
- **Cohesion of work** – attention to the risk of lack of coherence resulting from the division of tasks.
- **Understand your professor's expectations** and strive to meet them.
- To achieve the highest evaluations, not only must you meet these expectations, but you should also **aim to innovate** and provide value that exceeds what is anticipated.

1.4- Bibliography and sources

- **Concepts:**
 - Main bibliographic reference – Course manual and lecture slides;
 - Other bibliography (less important).
- **Company Information:**
 - Interview (Identify the interviewee in the report)
 - Official Company webpage;
 - Other Sources– ex.: News related to the company and theme.

Official company website

- Commercial website versus **Institutional website**;
- Exploration of **institutional website** – Search for sections and documents on (depending on the subject of the case):
 - Vision, Mission, Values, Code of Conduct;
 - History;
 - Products & Markets;
 - Career;
 - Diversity & Inclusion;
 - Ethics and Social Responsibility;
 - Reports and Accounts and Governance;
 - (...)

Subjects

- **Case 1:** Managing Diversity
- **Case 2:** Social Responsibility and Sustainability
- **Case 3:** Strategy
- **Case 4:** Human Resources Management

2. Case Discussion



Fonte: <https://unsplash.com/s/photos/teamwork>

Case Discussion

Methodology of the Six Thinking Hats of Edward De Bono

EDWARD DE BONO ORIGINATOR

Nominated for the Nobel Prize for Economics in 2005, Edward de Bono is regarded by many as the leading authority in the field of creative thinking, innovation and the direct teaching of thinking as a skill. He is equally renowned for his development of the Six Thinking Hats technique and the Direct Attention Thinking Tools. He is the originator of the concept of Lateral Thinking, which is now part of language and is listed in the Oxford English Dictionary. Dr. de Bono was born in Malta. He was a Rhodes Scholar at Oxford, holds an MA in psychology and physiology from Oxford, a D. Phil. in Medicine and also a Ph.D. from Cambridge. He has held faculty appointments at the universities of Oxford, Cambridge, London and Harvard. Dr. de Bono's background in self-organizing systems led him to derive an understanding which he then applied to the neural networks of the brain (see *The Mechanism of Mind* 1969 – Penguin books).

His instruction in thinking has been sought by many organizations: IBM, Prudential, GM, BT (UK), NTT (Japan), Nokia (Finland), Mondadori (Italy), Total (France), Siemens (Germany), Bosch (Germany), Ericsson (Sweden) and many others. His methods are now mandatory in the school curriculum in many countries and widely used in others.

He has written 70 books with translations into 38 languages and has been invited to lecture in 57 countries.

Dr. de Bono was chosen by a group of academics as one of the 250 people who had contributed most to humanity in the whole history of the human race.

The appeal of Dr. de Bono's work is its simplicity and practicality. It can be used by four year olds and by senior executives; by Down syndrome youngsters and Nobel laureates.

Dr. de Bono is currently the chairman of the Council of Young Enterprise Europe, which has a membership of 1,500,000 youngsters across Europe, Israel and Russia, who set up mini-businesses while at school.



A partial listing of his 70 books include; *New Think*, *Mechanism of Mind*, *Six Thinking Hats*, *Lateral Thinking*, *Serious Creativity*, *I Am Right-You Are Wrong*, *Parallel Thinking*, *Conflicts-A Better Way to Resolve Them*, *Water Logic*, *Simplicity*, *Teaching Thinking*, *New Thinking for the New Millennium*, *PO: A Device for Successful Thinking*, and *Future Positive*.

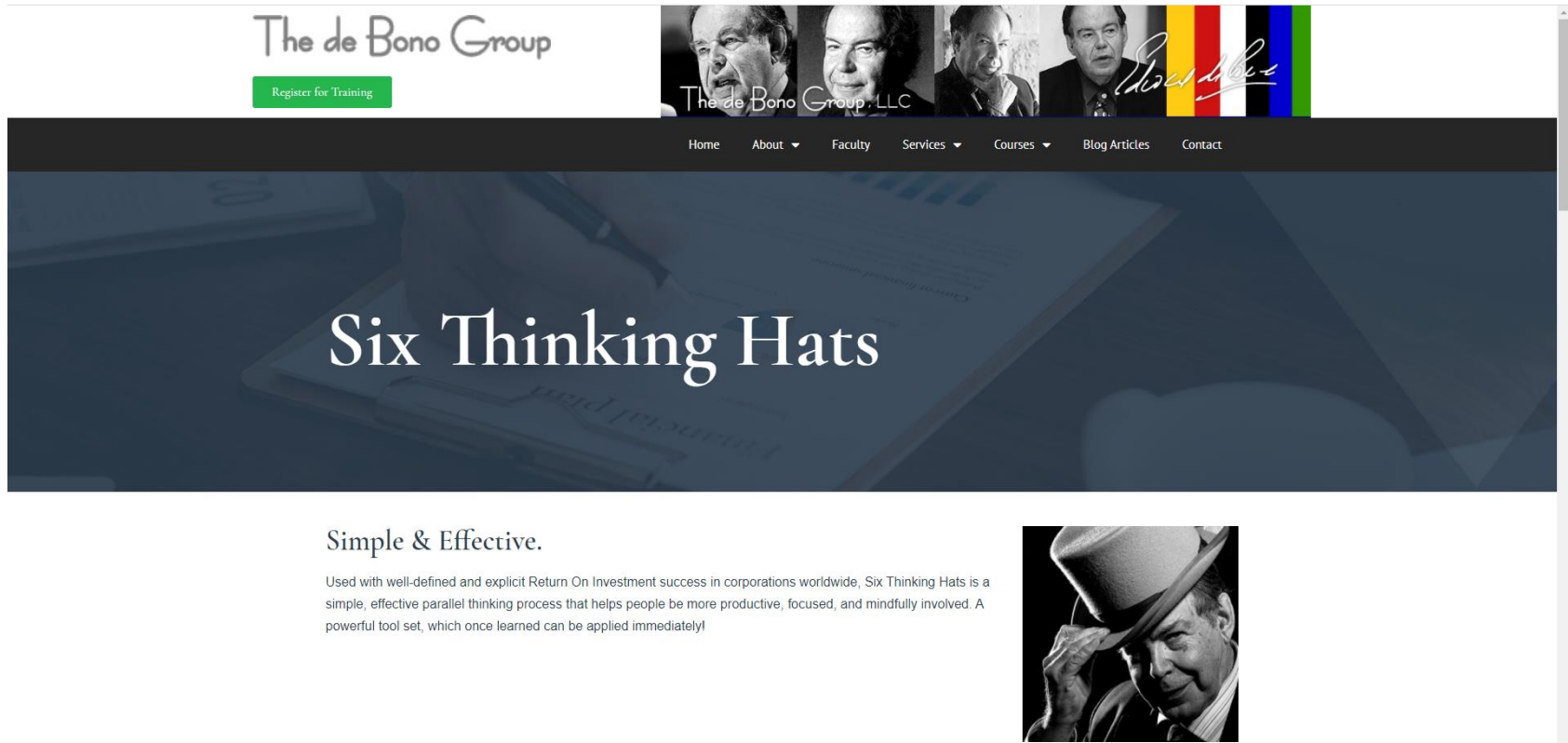
- Nominated for the **Nobel Prize in Economics** in 2005;
- World authority in the field of **creative thinking** and **innovation**;
- He developed, among others, the **Six Thinking Hats Methodology**.

Edward de Bono on creative thinking
<https://youtu.be/UjSjZOjNIJg>

Source: <https://www.debonogroup.com/edward-de-bono/>

Case Discussion

Methodology of the Six Thinking Hats of Edward De Bono



The screenshot shows the homepage of The de Bono Group. At the top, there is a navigation bar with links: Home, About, Faculty, Services, Courses, Blog Articles, and Contact. Below the navigation bar is a large banner with the text "Six Thinking Hats" in a large, white, serif font. To the left of the banner, there is a green button that says "Register for Training". To the right of the banner, there is a row of four small images: three black and white portraits of Edward de Bono and one color image of the Six Thinking Hats logo. Below the banner, there is a section titled "Simple & Effective." followed by a paragraph of text: "Used with well-defined and explicit Return On Investment success in corporations worldwide, Six Thinking Hats is a simple, effective parallel thinking process that helps people be more productive, focused, and mindfully involved. A powerful tool set, which once learned can be applied immediately!" To the right of this text is a black and white image of Edward de Bono wearing a top hat and holding it with his hand.

The de Bono Group

Register for Training

The de Bono Group LLC

Home About Faculty Services Courses Blog Articles Contact

Six Thinking Hats

Simple & Effective.

Used with well-defined and explicit Return On Investment success in corporations worldwide, Six Thinking Hats is a simple, effective parallel thinking process that helps people be more productive, focused, and mindfully involved. A powerful tool set, which once learned can be applied immediately!



Thinking with Hats Intro: <https://youtu.be/hvChZ4DAghY>

Edward de Bono - discusses the Six Thinking Hats®
<https://youtu.be/o3ew6h5nHcc>

Fonte: <https://www.debonogroup.com/services/core-programs/six-thinking-hats/>

2. Case Discussion

Indications for elaborating the discussion of the case




- When they receive the case presentation document they need to discuss, all members of the group should read it carefully and familiarize themselves with the company and its website;
- Then, it is suggested that the group meet to analyze and prepare the discussion document of the case together. To do this, they should promote a conversation about the case, **using the principles of the Six Thinking Hats methodology®**. Wearing one hat at a time, everyone in the group should contribute to the conversation. One of the members of the group, previously chosen, must use the Blue Hat, that is, be the moderator of the discussion. Their role is to ensure that only one hat is worn at a time, and that the members of the group stick to that style of thinking.

2. Case Discussion

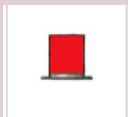

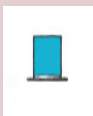
Indications for elaborating the discussion of the case

- After wearing each hat, they should **recording the findings** of your discussion, in a document to be presented to the class and the teacher, on the agreed day;
- Finally, you should complete your document with a **introduction** and a **conclusion**. The **introduction** should reflect a brief presentation of the case they discussed, and the **conclusion** should integrate the work developed with the hats.
- In the following slides, the various hats are presented, and how they can be used in the discussion of the case. Good job! 😊

2. Case Discussion

HAT	DESCRIPTION	HOW TO USE IT IN THE DISCUSSION OF THE CASE
WHITE 	The White Hat asks for known or necessary information. "The facts, just the facts."	With this hat they must identify the facts exposed in the work that attest to the application of the concepts to the analyzed company.
YELLOW 	The Yellow Hat symbolizes brightness and optimism. Under that umbrella, you explore the positives and look for value and benefit.	With this hat they should identify the aspects that they consider most positive in the case they are analyzing.
BLACK 	The Black Hat identifies risks, difficulties, problems – The risk management hat, probably the most powerful hat. It can be a problem, however, if overused. It serves to identify difficulties, but also ways to overcome them.	With this hat they should identify the points that could be improved in the case they are analyzing, such as concepts from the chapter that were not addressed in the analysis of the case, failure to identify initiatives that attest to the connection between the concepts and what the company develops, among others.

2. Case Discussion

CHAPÉU	DESCRIÇÃO	COMO UTILIZAR NA DISCUSSÃO DO CASO
RED 	<p>The Red Hat asks you to reflect on feelings, hunches, and intuition. By wearing this hat, you can express emotions and feelings and share fears, likes and dislikes.</p>	<p>With this hat they should focus on the communication style of the colleagues who present the work. You can also reflect on some aspect of the case that you have identified with, or that has been particularly significant to your discussion.</p>
GREEN 	<p>The Green Hat focuses on creativity; the possibilities, alternatives and new ideas. It is an opportunity to express new concepts and new perceptions.</p>	<p>With this hat they should identify what they would have done differently if they had analyzed the case they are discussing, such as what other perspectives could have been addressed, what alternatives could have been presented in the analysis.</p>
BLUE 	<p>The Blue Hat is used to manage the thought process. It is the control mechanism that ensures that the indications of the Six Thinking Hats® are observed.</p>	<p>This hat must be worn by one of the members of the group, who will be the facilitator of the discussion of the case. Their job is to ensure that all members of the group stick to the thinking style of the chosen hat.</p>

3. Practical exercises

EXERCISE: **THE BEST** **CHOCOLATE** **CAKE IN THE** **WORLD**









Fonte: <http://nibblesworth.com/incredible-luscious-cake/>

Exercise 1

Good morning Chefs!

- They were selected to prepare the **World's Best Chocolate Cake!**
- Using the methodology of the Six Thinking Hats™ and using one Hat at a time, we will together "cook" the Best Chocolate Cake in the World😊!
- I will be your Blue Hat, that is, the moderator. **Let's use one Hat at a time.**
- To do this, we can think of several aspects:
 - The Recipe;
 - The utensils you need;
 - The ingredients;
 - The format;
 - Etc.

HAT	DESCRIPTION	THE BEST CHOCOLATE CAKE
WHITE 	The White Hat asks for known or necessary information. "The facts, just the facts."	
YELLOW 	The Yellow Hat symbolizes brightness and optimism. Under that umbrella, you explore the positives and look for value and benefit.	
BLACK 	The Black Hat identifies risks, difficulties, problems – The risk management hat, probably the most powerful hat. It can be a problem, however, if overused. It serves to identify difficulties, but also ways to overcome them.	

HAT	DESCRIPTION	THE BEST CHOCOLATE CAKE
RED 	The Red Hat asks you to reflect on feelings, hunches, and intuition. By wearing this hat, you can express emotions and feelings and share fears, likes and dislikes.	
GREEN 	The Green Hat focuses on creativity; the possibilities, alternatives and new ideas. It is an opportunity to express new concepts and new perceptions.	
BLUE 	The Blue Hat is used to manage the thought process. It is the control mechanism that ensures that the indications of the Six Thinking Hats® are observed.	

Exercise 2

Good morning Chefs!

- And now that we've got the **World's Best Chocolate Cake**, How are we going to get it to the sweet teeth of this world?
- Using the Six Thinking Hats™ methodology and using one Hat at a time, you will meet with your working group and think about how you will market the Best Chocolate Cake in the World 😊!
- You have to choose a colleague from the group to be your Blue Hat, i.e. the moderator. Don't forget to **wear one hat at a time**.
- To do this, they can think of several aspects:
 - Where and how they will sell?
 - Who do you want to sell to? Consumers? Other companies?
 - Marketing?
 - Collaborators?
 - What is your differentiation?
 - Price?

Good job!



Fonte: <https://unsplash.com/s/photos/high-five>