



RULES FOR CASE ANALYSIS AND DISCUSSION

Principles of Management

2025/2026

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 "IG_ClassXXX_CaseXX";
 - For instance: **IG_ClassM01_Case1A**.

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 = 15-18 minutes);
- **Discussion of another group's analysis/report** (Duration = 5-8 minutes).

Note: The analysis should start from the **concepts exposed in the theoretical classes** and justified with the **Information Collected** in the sources that must be correctly identified.

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

(6) Bibliography and Webgraphy

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 Object;
 - Main questions;
 - 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**

- Answering assignment Questions;
- It should be presented and related the theoretical body and the empirical material (**but they should not have a first part with all the material and another with information about the company, but rather a constant integration of the two**);
- The importance of framing and relating to the company should not be forgotten (Link between parts of the development section);
- The implementation of development does not imply that there is a section called "Development".

1.3- Sections of the report (5)

- **Conclusion**
 - Synthesis of the key ideas 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)

- **Bibliography and Webgraphy**
 - With proper criteria!
 - Do not cite wikipedia, blogs, and other sources of similar characteristics(only in very exceptional situations).

Advice (1)

- **Being aware of the subjects** keeping up with the theoretical classes;
- Identify the relevant **chapters and concepts** and how they can be related;
- **Think ahead about the structure of the work**, in particular the development part;
- **Establish collaboration** with the targeted company as soon as possible

Advice (2)

- **Pay attention to deadlines** – plan your tasks;
- Start from the indicated sources and do new research but without getting lost;
- Use the syllabus and relate it to the information collected;
- **Cohesion of work** – attention to the risk of lack of coherence resulting from the division of tasks.

1.4- Bibliography and sources

- **Concepts:**
 - Main – UC manual and lecture slides;
 - Other bibliography (less important).
- **Company Information:**
 - Interview (Identify the interviewee in the report)
 - Main – Official Company Page;
 - 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;
 - (...)

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**.

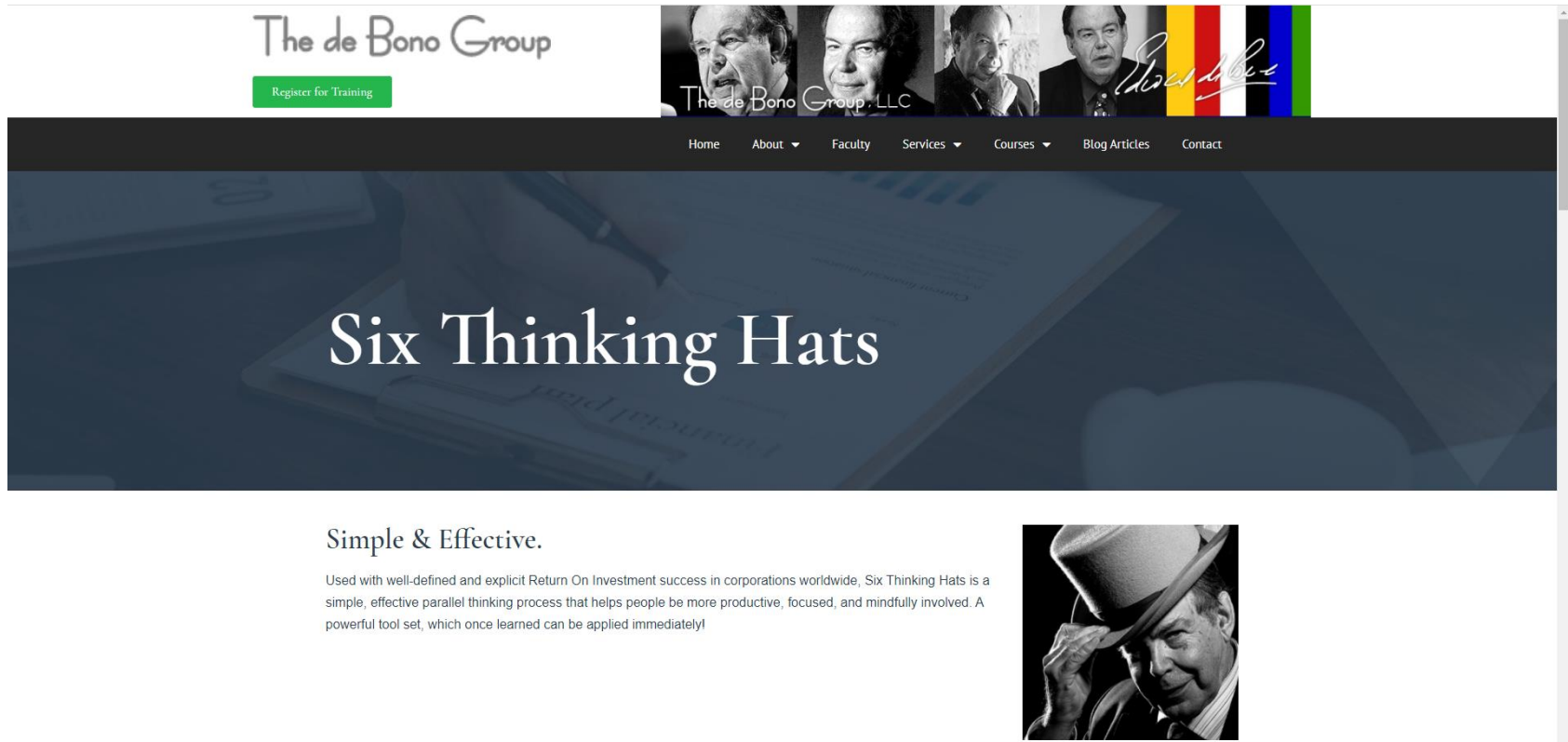
Edward de Bono on creative thinking

<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 serif font. To the left of the banner, there is a logo for "The de Bono Group" and a green button that says "Register for Training". To the right of the logo, there is a row of four small images: three portraits of Edward de Bono and one of the Six Thinking Hats. Below the banner, there is a section titled "Simple & Effective." followed by a paragraph of text. To the right of the text, there is a black and white photograph of Edward de Bono wearing a top hat.

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.

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

2. Case Discussion

CHAPÉU	DESCRIÇÃO	COMO UTILIZAR NA DISCUSSÃO DO CASO
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.	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.
GREEN 	The Green Hat focuses on creativity; the possibilities, alternatives and new ideas. It is an opportunity to express new concepts and new perceptions.	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.
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.	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.

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.	

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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>