



- ★ 掌握案例研究：原则与挑战
- ★ 怎样了解案例研究
- ★ 怎样有效地撰写分析
- ★ 撰写案例研究报告
- ★ 案例研究的口头演示
- ★ 怎样撰写一个新的你自己的案例

〔英〕杰隆·博格(Jeroen van den Berg)

〔英〕艾菲德·罗伯茨(Elfed Roberts) 编著

黄智颖(Huang Zhiying)

# 商业案例实战 训练指南

## The Case Study Approach

〔英〕杰隆·博格(Jeroen van den Berg)

〔英〕艾菲德·罗伯茨(Elfed Roberts) 编著

黄智颖(Huang Zhiying)

# 商业案例实战 训练指南

**Business Studies:**  
**The Case Study Approach**

 复旦大学出版社

**图书在版编目(CIP)数据**

商业案例实战训练指南/[英]杰隆·博格(Berg, J.)、[英]艾菲德·罗伯茨(Roberts, E.)、黄智颖编著. —上海:复旦大学出版社, 2011.6  
ISBN 978-7-309-08136-7

I. 商… II. ①杰…②艾…③黄… III. 商业管理-案例-高等学校-教学参考资料  
IV. F712

中国版本图书馆 CIP 数据核字(2011)第 093441 号

**商业案例实战训练指南**

[英]杰隆·博格(Jeroen van den Berg) [英]艾菲德·罗伯茨(Elfed Roberts)  
黄智颖 编著  
责任编辑/鲍雯妍

复旦大学出版社有限公司出版发行  
上海市国权路 579 号 邮编:200433  
网址:fupnet@fudanpress.com http://www.fudanpress.com  
门市零售:86-21-65642857 团体订购:86-21-65118853  
外埠邮购:86-21-65109143  
上海市崇明县裕安印刷厂

开本 787×960 1/16 印张 14.5 字数 233 千  
2011 年 6 月第 1 版第 1 次印刷

ISBN 978-7-309-08136-7/F·1705  
定价: 28.00 元

---

如有印装质量问题, 请向复旦大学出版社有限公司发行部调换。  
版权所有 侵权必究

# Acknowledgements

First and foremost the authors have a huge, but pleasant burden of debt to the MBA students of Fudan University, Shanghai and the University of Hong Kong whose questions, contributions and constructive criticisms led us to the decision to write this book. Their thirst for knowledge and dedication to mastering the complexities of the modern business environment has proved an inspiration to us all.

We would also like to thank Dawn Roberts for her unfailing support in correcting the worst of our mistakes and for demanding clarification of ideas where we mistakenly took the meaning for granted when we should not have done so. Her constant willingness to bear the tedious administrative burden of editing out our errors and the good humour with which she bore our demands for instant results is a testament to her patience.

The University of Hong Kong Case Study Unit and its director Professor Ali Farhoomand kindly helped by allowing us to use case studies in the text, as indeed did The Centre for Business Case Studies at the Hong Kong University of Science and Technology under the directorship of Roger King and Winnie



Peng.

Many people helped us by reading the drafts of the text and made practical suggestions for improvement. They include Penelope Chan, Havovi Joshi and Yanling Guan.

Thanks also go to the publishers of this book who received our work and published it quickly and efficiently. However, for any shortcomings or mistakes we take sole responsibility, but hope fervently there are not too many.

# CONTENTS

## **Introduction /1**

About the authors

Why was this book necessary?

Our methods

## **Chapter 1 Mastering Case Studies: Principles and Challenges/ 6**

- What is a case study?
- What is the purpose of using case studies in the context of Business Studies?
- What are the advantages of case studies over other forms of instruction?
- How can case studies help you in your career?

## **Chapter 2 How to Approach the Case Study/ 20**

- Using the most efficient way to read and analyze a case study.
- How to pose questions to yourselves on the case study?
- How to work on the case as a group: practical considerations
- How to answer questions you are given?

## **Chapter 3 How to Write Your Analysis Effectively/ 39**

- Separating the relevant from the irrelevant.



- The problem of plagiarism and how to avoid it.
- How to attribute other people's work?
- How to write originally and to paraphrase a case study effectively?

#### **Chapter 4 Writing a Case Study Submission/ 56**

- Factors to consider when selecting and preparing the content of your submission.
- How to decide the form of your submission?
- How to write a report on the case study that you have analysed?

#### **Chapter 5 Oral Presentation of Case Studies/ 68**

- How to write the oral presentation of a case study?
- How to prepare and what to include and avoid?
- How to work in a team for case study preparation?
- How to present your case study orally?
- Preparing and answering questions.

#### **Chapter 6 Writing Your Own Case Study — How to Prepare and Write a New Case Study / 88**

- How to pick the topic for your case study?
- How to carry out preliminary research?
- How to prepare a case plan and framework?
- Completing your research.
- How to use the appropriate style and write your draft?
- Attribution and teaching notes.
- Proof reading and publication.

#### **Chapter 7 Sun Toys Motor: How to Put a Start-up on Track/ 115**

- Reading and analysing a qualitative case study.
- Look at a model presentation as a guide.
- Possible questions from the audience and suggested answers.
- Prepare an oral presentation on the case.

**Chapter 8 Sino Land: Hotel Spin-off/ 131**

- Read and analyse a case study that requires a significant amount of quantitative analysis.
- Prepare a written presentation on the case.

**Chapter 9 Crown Worldwide Holdings Ltd.: Passing the Torch in a Family Business/ 167**

- Read and analyse a case study.
- Prepare a written presentation on the case and an oral presentation.
- Look at questions you are expected to answer about the case.

**Chapter 10 Oasis Hong Kong Airlines — Hong Kong's First Low Fare Airline: What Went Wrong? / 189****Conclusion/ 217****Reference/ 220**



# 目 录

## 导言 / 4

关于本书作者  
为何需要这本书?  
本书使用的方法

## 第一章 掌握案例研究:原则与挑战 / 17

什么是案例研究?  
在商业分析中进行案例研究的目的是什么?  
相对其他形式,案例研究的优势是什么?  
案例研究将怎样有益于你的职业生涯?

## 第二章 怎样了解案例研究 / 34

用最有效的方式来阅读和分析案例。  
怎样自我提问以分析案例?  
怎样通过团队合作进行案例研究?  
怎样回答问题?

## 第三章 怎样有效地撰写分析 / 54

区分相关信息和无关信息。  
抄袭问题以及如何避免抄袭。  
如何引用他人的成果?



如何原创性且有效地撰写案例分析?

#### **第四章 撰写案例研究报告/ 66**

在选择和准备案例研究报告内容时要考虑的因素。

怎样选择提交案例研究报告的形式?

如何将已分析完的案例写成研究报告?

#### **第五章 案例研究的口头演示/ 85**

如何准备一个案例分析的口头报告?

怎样准备内容和避免失误?

怎样团队协作进行准备?

怎样进行口头表达?

准备并回答问题。

#### **第六章 怎样撰写一个新的你自己的案例/ 109**

怎样选择一个主题?

如何进行初步研究?

如何准备案例的研究计划和框架?

完成调查研究。

如何使用适当的形式并撰写初稿?

引用及撰写教案。

校对和发布。

#### **第七章 关于 Sun Toys Motor 公司的案例/ 128**

阅读并分析一个定性分析的案例。

了解一个演示模板作为指导。

读者基于案例可能提出的问题及答案。

准备一个关于此案例的口头演示。

#### **第八章 关于 Sino Land 公司的案例/ 165**

阅读并分析一个需要大量定量分析的案例。

为案例准备一份书面的演示报告。

**第九章 关于 Crown World Holding 公司的案例/ 188**

分析一个案例。

为案例分析准备一个书面报告和一个口头汇报。

准备你会被提问的问题。

**第十章 关于 Oasis 香港航空公司的案例/ 216**

总结/ 219

参考文献/ 220

# Introduction

## ►► *About the authors* ►►

Three people have worked together to write this book. The first writer is Jeroen van den Berg. He has a huge amount of experience in the development of case studies, which are used internationally by staff and students in North America, Europe and Asia. He works at the University of Hong Kong's *Asia Case Research Centre* (ACRC), the largest Asia-based business case centre, and was one of the first to see the significance of writing with specific Asian examples. Jeroen writes case studies himself and is in charge of a team writing case studies at the ACRC. He is also a regular judge at several case competitions at both the graduate and undergraduate level, and for the past three years has been organizing the HSBC/McKinsey Business Case competition.

The second writer is Elfed Vaughan Roberts. He has worked at Hong Kong University for over thirty years, working in the Business School, and has also taught for over ten years at Fudan University, Shanghai. He has taught thousands of students from various MBA programmes, and has used many case studies as one of his approaches.

The third author is Gene Huang, who works at Fudan University, and has kindly offered to translate parts of this book into Chinese so that it can be read more easily and efficiently.

### ►► *Why was this book necessary?* ►►

The three contributors to this book got together and asked some simple questions. For a beginning we asked ourselves if there was a need to write another text when there are already texts on the market dealing with this subject.

The answer was very much a “yes” because the publications on the understanding of the case study approach tend to target a western audience, especially readers who are native English speakers. These publications largely take western examples and are often theoretical as opposed to giving the reader in Asia a lot of practical advice on how to approach a case study. It seemed important that this new practical guide on how to deal with case studies and in particular case studies in the Asian context should be published. Also we felt that while western case studies are important in their own right, our readership might like to primarily concentrate on how business is conducted in Asia. This is a region which is quickly assuming major significance in the world and where a particular form of business behaviour, different in many aspects from its western counterparts, is beginning to emerge.

The second question was who might benefit from the writing of this book. Our answer, after long discussion, was that we would target MBA students and advanced undergraduate students primarily in Greater China but also in other parts of Asia. The book will also be of interest to teaching faculty and western students wanting to know more about learning with case studies in the Asian Business context.

We also felt that there might be a demand from professionals who are looking to improve their skills in writing, analysing and presenting cases for

consideration by their company and its customers in a more interesting and stimulating fashion.

Last, many western firms and an ever increasing number of Asian companies use case studies as part of their recruitment process. The skills taught in this book will thus be of interest to those looking to improving their performance at job interviews, as well as to the recruiters.

### ►► *Our methods* ►►

We then proceeded to ask the question of what might be the most relevant and effective approach to present the material. The decision was to employ a progressive design, beginning with the basic ways of dealing with cases, and building more complex skills as we progressed. We begin with the skills needed in case analysis and the lists of “do’s and don’ts”, leading to an examination of actual cases in the latter part of the book. Also, as most students are not native speakers, we have decided to write in simple and understandable English, with Chinese commentary and summaries to help the reader through this book. Many exercises have been included to ensure that the building of knowledge is a gradual, and hopefully, enjoyable process.

Lastly, we discussed how the reader would benefit from reading this book. We sincerely trust that you do so. So let’s begin our journey.

## ►► 关于本书作者 ►►

本书由三位学者专家合著,第一位是来自亚洲最大的案例中心——香港大学亚洲案例中心(ACRC)的案例团队负责人 Jeroen van den Berg 先生,他不仅撰写了大量被全球专家和学生广泛使用的案例,而且还经常担任众多本科和研究生案例比赛的评委,在过去三年中组织了汇丰-麦肯锡商业案例大赛。

第二位专家是 Elfed Vaughan Roberts 先生,他在香港大学商学院工作了三十余年,亦在复旦大学教学十多年,教授过许多 MBA 学生,在教学过程中大量地使用了案例。

第三位专家是在复旦大学工作的黄智颖先生,他翻译了部分内容,以便使大家在阅读本书时,更容易理解内容,更有效地学习。

## ►► 为何需要这本书? ►►

当这三位专家聚在一起时候,探讨一些基本问题。例如,是否有必要在市场上已有的案例写作和分析类图书之外再写一本书。

答案毫无疑问是肯定的,以前出版的很多这方面的读物多是对以母语为英语的西方读者,往往着重于理论方面,而非针对亚洲读者并提供如何处理实



际案例的建议。此外,大家一致认为,尽管西方的案例研究已经发展得比较完善,但对于亚洲的商业实务是如何进行的,如何应对那些异于西方的特殊情境,这些问题也日益显现出重要性。

之后的问题是,这本书对谁有帮助?我们觉得本书的主要读者是在大中华地区和亚洲其他地区的高年级本科生和 MBA 学生,当然还有那些对研究亚洲商业有兴趣的西方学生。

我们认为还有可能是,一些专业人士也在寻找提高写作技能的方法,希望以一种更有趣、有效的方式来分析和提交关于其公司的案例。

最后,越来越多的西方公司和亚洲公司正将案例研究用于其招聘过程,本书所传授的一些技能,可能会帮助大家改进在面试中的表现。

## ▶▶ 本书使用的方法 ▶▶

我们接着问的是“什么是最相关和最有效的方法”,首先需要提供关于案例分析“做什么与不做什么”的技能以及如何应用于实践,尤其是在书的后半部分提供了许多实际案例供大家学习和研究。此外,由于大部分学生的母语都非英语,所以我们决定使用简明易懂的英语进行写作,并配有中文点评和摘要,以使读者获得循序渐进且愉快的学习和阅读体验。

让我们开始这次探讨案例分析的旅程吧。



# Chapter 1

## Mastering Case Studies: Principles and Challenges

***In this chapter we are going to learn:***

- What is a case study?
- What is the purpose of using case studies in the context of Business Studies?
- What are the advantages of case studies over other forms of instruction?
- How can case studies help you in your career?

### ►► ***What is a case study?*** ►►

There are two main styles of case study writing. The first is known as an “inquisitive”, “American style” or “Harvard style” case study. That can be defined as “*the description of an actual business situation in which the reader is asked to take up the role and responsibilities of the decision maker(s) in the business and provide solutions to issues faced by that business*”. Thus, in a case study, the authors do not mean to just provide the description of an actual business situation. The second style of case writing offers a simple description of an actual business situation, which describes an issue faced and the steps the company took to address the issue. This style is better known as