



- ★ 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

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〔英〕艾菲德·罗伯茨(Elfed Roberts) 编著

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商业案例实战 训练指南

Business Studies:
The Case Study Approach

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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.

身 言

▶▶ 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针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