

Case Studies - The 7-Step Plan

The key to case study work is to ask yourself the right kinds of questions.

The 7-step plan is a methodical series of steps that helps you to clarify what questions you need to ask.

The 7 steps are:

Step 1: Familiarise yourself with the case study and the questions asked

Step 2: Begin to analyse the problem situation

Step 3: Assess the value of any quantitative information provided

Step 4: Defining the problem / situation

Step 5: Identify and use the relevant theory to analyse the case study more fully

Step 6: Find the style of answer required

Step 7: Present your case study

Let's get some practice right from the start. Read through the following case study and questions. We will then use the 7-step plan as we work towards an answer.

Example case study

Alan, the workshop foreman, has organised a staff training night to allow Mike (senior technician) to pass on knowledge gained at a recent franchise-based training course on diagnosing electronic system faults.

An in-house training session was arranged, well in advance, for 5 – 7 pm on a Tuesday night in the lunch room. Each member of the technical staff was sent an invitation 3 weeks beforehand. Alan also arranged for pizza's to be delivered at 6:45 pm on the night.

Mike is happy to pass on the knowledge that he has gained. He took plenty of notes while at the franchise course and is sure he can speak for a couple of hours on the subject.

On the Monday afternoon Alan makes a point of reminding all of the technical staff that there will be a training session at 5 pm the following night.

He is disappointed to find out that Sam will need to leave by 6:00 pm to attend his night class and that Joe is away on holiday. They decide to proceed anyway.

Knowing that this is the first time that Mike has run a training session, Alan asks him if he is all organised for the next night, Mike replies "no problems".

At 5:00 pm on the Tuesday Alan is forced to complete a vehicle service that Debra had booked in to start later in the day. She had apparently not realised that there was a training session on that night.

Alan finishes the service at 5:30 pm and heads to the lunch room knowing that he is late for Mikes training session.

Mike is busy talking in great technical detail about the course that he attended. He often refers to the hand written notes that he took at the course.

Alan looks around the room and notices that those attending are looking bored. He also notices to his horror that Mike is running this training session without any information handouts, overheads or a data show being used.

There is no diagnostic equipment, manuals or vehicle parts - just Mike sitting on a chair talking.

Soon after Alan arrives, Sam excuses himself and heads off to his night class. By 6 pm Mike has run out of things to say and the training session comes to an end.

The staff had cold pizza for lunch the next day, Mike is feeling deflated and may not be keen to run another training session, the service manager is not happy with Alan's planning of this training session.

1. What were the barriers to training, in this case, and how could they have been minimised?
2. What should Alan have done to help ensure that this in-house training session was successful?
3. Discuss how Mike could have structured the session so that a range of learning styles were catered for?

A full description of the case study features and 7-step plan can be found in your ATech Resource Kit.

Model answer for example case study

Question 1

In this particular situation the main barrier to training was that the training occurred outside of normal working hours.

Alan certainly tried to minimise the impact of this by:

- providing dinner for all staff that attended
- giving technical staff plenty of notice.

Other things that he could have done include:

- reminding technical staff 1 week beforehand
- letting all staff know of the session
- arranging to close the workshop early so that all technical staff could attend
- scheduling the session when all technical staff were available (this may even mean that the session had to be held during the working day)

Question 2

In planning for this training meeting run by Mike, Alan should have taken the following steps.

1. Choose the correct night.

As workshop foreman, Alan should have access to information about staff leave and staff training, and therefore realised that Sam had night classes and that Joe would be on holiday. This type of information should always be taken into account when planning a training session or any staff activity.

One way to ensure that this did not happen again would be to track all staff leave, statutory holidays and staff training in one central point. Alan could use the booking diary or a day sheet of a year planner that is accessible to all staff.

2. Ensure that all staff are aware of the training session.

It seems that Alan had arranged this training meeting quite some time in advance, then reminded staff the day before. He should also have reminded them a week in advance of the meeting.

If the meeting had been noted in the booking diary or on the day sheet, Debra would have realised that she should not accept late bookings on that day.

3. Ensure that Mike would provide interesting and beneficial training.

Prior to Mike attending the franchise training course, Alan should have spoken to him about the possibility of running a training session on his return.

This discussion should have included asking Mike to think about the type of equipment and hand outs that he would need.

A week prior to the training meeting, Alan should have asked Mike exactly what he was planning and what resources he would need leading up to and on the night.

If Mike had advised that he was just planning to talk and use no props at all, Alan could have made some suitable suggestions and helped Mike to prepare.

Breaking up the training session with a demonstration on a vehicle in the workshop, CD based technical training material, website accessed information or training, the use of vehicle parts or diagnostic equipment would have added a lot of learning value to this session.

A training material hand out could also have been produced as these can be very valuable for future reference.

Question 3

An effective training session will usually combine the three main learning styles - learning through seeing, listening and doing.

From Alan's observation, Mike's approach of talking from notes he had taken during the franchise training session he attended did not capture his audience. He had not taken the time to analyse and interpret the information for his audience and this lead to them being bored and probably taking in very little.

Mike could have included diagrams, picture, video and combined these with verbal explanations, asking for questions from the group and some hands on time with the equipment. This structure would probably have resulted in a successful training outcome.