

Ace of case: how to conquer your case interview

It's that time of year again! Campus interview season. Well, truthfully I'm not sure when it isn't interview season anymore. Summer maybe? That aside…interviews can be stressful and take up a good deal of candidate "gut share" as they jockey for coveted internships and full-time positions in a competitive market where good talent is abundant.

In the past, I've written on various aspects of the interview process – from resumes to common interview questions – but one of the most feared aspects of any interview is the dreaded case study. *cue dramatic music* Case interviews come in many formats. Some are verbally recited by the interviewer as an impromptu discussion-based scenario while others are formally written and then presented to one or more simulated case characters. But at its core, case interviews are really just puzzles. And like all puzzles, there's an algorithm or method to solving them. The difference between case interviews and a complex jigsaw puzzle or Rubik's Cube is: a case study has no "right answer." While there are better answers than others, a case interview is much more about the process you demonstrate to arrive at a recommendation than trying to accurately guess what is in the head of your case interviewer.

I thought I would offer some insider information in this week's blog from a long-time case interviewer,

case writer and teacher of case-solving techniques on how to structure your case interview response. I will not comment on the content or topics of the case study; that will vary from case-to-case and position-to-position. Employers will expect that you are at least familiar with the subject-matter of the case either because it is your area of study or because they give you adequate time to prepare (or research) in advance.

First, some general tips…

- *Stay calm, breathe and don't freak out.* Employers want to get a sense of how you react under pressure so don't go postal. Keep calm and if you feel yourself start to get nervous, just take a few deep breaths. 99% of the case study evaluation is designed to test your ability to think through problems in a logical and structured way. It is far less important that you "get it right." It is critical that you demonstrate that you are able take a structured approach to solving problems. I'd rather see a logical, well explained and thoughtfully-presented case solution than something that is accurate but can't be explained or justified.
- *Your interviewer is playing the part.* In all likelihood your interviewer is playing a character, and in all likelihood, really doesn't behave the way he/she does in the interview. If your interviewer is aggressive, overly critical or difficult, they are trying to test you and potentially throw you off your game. Don't fall for this trap… Stay calm and handle their objections like a pro.
- *Don't be afraid of math.* You may find yourself doing math on a whiteboard or on a notepad. Practice doing some simple math before you go into the interview. If you are allowed to, you should also bring a calculator into your interview. Those little digital calculators embedded in your folio can be lifesavers.
- *Assume, assume, assume!* The case will only give you some of the facts. You should feel free to assume some facts; just be sure to state your assumptions. You should also commit to memory a few facts and figures like 2,000 working hours in a year, average blended bill rates, 40 hours per week, etc. Keep the numbers round so your mathematical calculations are easy.
- *If you are faced with a verbal case, you can ask questions.* Typically, 3-5 questions are OK but careful to not ask too many questions. Your interviewer may get impatient and want you to dive into your

discussion of the case. You can also pause and ask the interviewer for a minute or two to collect your thoughts and put something together.

- *Format and visual appeal matters.* If you are asked to present slides or written materials, remember to make them visually appealing. Use drawings, figures, frameworks to present the information. Oh, and don't forget to phrase your slide titles in short, crisp, full sentence statements.

There are many other fantastic case interview tips. The list above are a few big ones I've found helpful. Please share your tips and success stories in the comments section at the end of the article.

But how do I solve the case?

Cases are usually a conglomeration of issues strung together by a story. There are typically more issues in the case than you can solve in one sitting. The trick is to unpack the issues systematically, group them into themes and offer solutions that directly address the problem. It's just that easy… Here's a process I teach to my students and found to be effective:

1. **Read** and/or listen to the case scenario.
2. **Write** down the issues. List them on your notepad in bullet form.
3. **Analyze** the issues. Once you have read and digested the case and made a list of the key issues, group the issues into themes. Issues have some commonality among them and the groupings of issues allow us to compartmentalize the issues so we can address the root cause. For example, some of the issues around poor data quality, employee unhappiness, or inconsistent process execution could be grouped into buckets like "training," "organizational change," "system and technology," etc. The issue themes need not address every aspect of the case or encompass every issue you noted. It is OK if you focus on the big issue themes. I would also limit your issue themes to no more than three. If you have more than three issue themes, it's fine but you risk making your case response too complex or too long.
4. **Recommend** solutions to address the issue themes. This may take some creativity and brainstorming. This gets easier over time so practice practice practice!

5. **Describe** each solution recommendation. Now that you know what you want to recommend to address the problems in the case, it's time to cost it, lay the recommendations out on a time line and think about the risks and mitigations that the stakeholders should be aware of.

OK, now that we've sorted through the facts of the case, let's dive into a suggested structure for both written and verbally recited case study scenarios.

If the case is written and requires a written response with a presentation…

If the case is written, I'd suggest the following format for framing up your slides. Each numbered/bold item below represents one slide in your presentation:

1. ***Cover Slide*** – This should include a presentation title, date, client name and company name.
2. ***Agenda*** – Use this as an opportunity to tee-up what you are going to talk about.

- Executive Summary
- Proposed Solution
- Time Line
- Cost
- Risks and Mitigation
- Conclusion and Q&A

3. ***Executive Summary*** – This slide should clearly and concisely describe the following:

- *Situation* – This should briefly describe (in 3-5 bullets) the background, the facts of case, the company and/or the scenario. The situation should NOT include anything controversial and does not include any issues. The situations should be facts about the case that no one can dispute or disagree with. Your goal is to set the stage and set context.
- *Complications* – What are the big issues you noted in the case? Summarize the big issues causing

problems in a few bullets. You can draw on the issue themes here to summarize the grouped issues into concise statements.

- *Problem Statement* – What is the problem or problems you are trying to solve? In one or two sentences, state the problem or problems in the question form. Sometimes the problem statement is given to you and other times the case may be open-ended and you can define your own problem statement. The key is to establish the problem you are trying to solve so that it builds suspense and anticipation for the solution (see next slide).

4. ***Solution Overview*** – This slide should introduce your three primary recommendations with a brief description of each solution component. As mentioned above, you can have more than three recommendations/solutions, but remember to keep it as simple as possible. When in doubt, keep it to three recommendations/solutions.

- *Solution Component 1* with brief description.
- *Solution Component 2* with brief description.
- *Solution Component 3* with brief description.

5. ***Solution Component 1*** – Describe solution component 1 in bullet form. Be sure to describe what it is and how you plan to deploy it. Remember to include visuals and/or financial analysis to justify/prove your recommendation.
6. ***Solution Component 2*** – Describe solution component 2 in bullet form. Be sure to describe what it is and how you plan to deploy it. Remember to include visuals and/or financial analysis to justify/prove your recommendation.
7. ***Solution Component 3*** – Describe solution component 3 in bullet form. Be sure to describe what it is and how you plan to deploy it. Remember to include visuals and/or financial analysis to justify/prove your recommendation.
8. ***Time Line*** – Use a Gantt chart to lay out each recommendation on a time line to describe how long each one will take. For extra credit, include project management and development methodologies such as SDLC to show and approach for how each solution component is deployed. If you get to this aspect, great! If not, don’t sweat it.

9. ***Cost*** – Each recommendation has a cost. Be sure to cost out your solution recommendations. Be sure to answer the following questions in your cost estimate:

- How much will it cost to build and deploy your recommendations?

- Use an average blended bill rate for your consultant resource estimates (e.g. $250/hr)
- Approximate how long each recommendation will take and number of hours/week. (e.g. 6 weeks @ 40 hours/week per consultant)
- Approximate how many people it takes. (e.g. 3 consultants)
- Approximate expenses on top of fees. (e.g. 10-15% is typical)
- Now do the math!
- Hardware, licensing and software cost – Express this as a one-time cost in the deployment year but be sure to describe the maintenance cost (see below).
- How much will it cost to run and maintain the future state once the recommendations are deployed? You should include:

- Salaries for new personnel you need to hire.
- Ongoing licensing fees
- Hardware and software upgrades and updates
- Internal cost – Some companies include the cost of their own resources and some don't. If you include this, take the same approach as as estimating the consultant resource cost and set the internal resource cost rate at $100/hour.

10. ***Risks and Mitigation*** – Describe the risks you identified that would jeopardize successful execution of your recommendations. For each risk be sure to describe a mitigation that you recommend to address lessen the impact or likelihood of each risk.
11. ***Conclusion*** – Simply restate the problem you are trying to solve and the solution components that address this problem.
12. ***Q&A*** – Leave a slide to prompt Q&A from your case interviewers.

If the case is verbally recited and requires a verbal response…

1. Listen to the case and take notes and pay careful attention to quickly capturing the issues.
2. After the interviewer is done giving you the scenario, you may ask 3-5 questions and clarify what was said or validate any assumptions you are making. Most likely, your interviewer will give you your problem statement like “how would you solve this specific aspect of the scenario?” He or she may ask a more general problem statement like “what do you recommend?”
3. Sometimes your interviewer will give you a minute or two to do some analysis and craft your solution recommendations. Others may want you to launch into your recommendations and talk through your thought process out loud. If no instruction is provided, you should feel free to ask “can I take a minute or two to put some thoughts together for you?” If he or she says yes, go through the issue grouping and recommendation creation steps described above.
4. To begin, restate the situation and background that you heard to set context on the situation.
5. Go through some of the issues that you heard. If you have been given the time, group them into themes. If not, don’t worry; just state the issues.
6. Restate the problem statement and validate that’s what your interviewer wants to you focus on.
7. Introduce the three solution components and describe how you came up with each one. If you have not been given time to come up with these, roll with it and brainstorm. If you get stuck, start with the old “People, Process, Technology” framework and frame up your recommendations into those buckets.
8. Next, take each solution component individually and describe it, how you would do each one and explain what issues this will solve.
9. Talk through a high-level time frame. You do not need to be precise! Just estimate how long each solution component will take.
10. For cost, I would talk about the components that should be considered in estimating cost (see written guidance above). I don’t think it’s necessary to calculate cost on the spot unless you are specifically asked to do so. Just describe your thought process for getting to a cost estimate.

11. Talk about the things that could put your recommendations at risk and what you plan to do to minimize their detrimental impact.
12. Conclude by restating the problem that you addressed and reiterating the three components of the solution.
13. If your interviewer has not asked questions along the way, pause, and ask for any questions he or she may have.

You will notice the written and verbal case study follow a similar flow. Verbal case studies can be a bit tricky and require a bit more mental agility based on the facts of the case and how it is delivered by the interviewer. Just remember: stay calm and roll with it. Commit this structure to memory so it becomes second nature. Once you master this structure, you will free up mindshare to focus on analysis of the case without worrying about “doing it right.”

Practice makes perfect

Case study interviews can be unnerving but remember that these cases are meant to give prospective employers insight into how you react to stressful situations and how you approach problems. Even if you are 100% wrong in your analysis and your recommendations, if you exude confidence and demonstrate a well-structured approach, and practice Practice PRACTICE, you stand a good chance of setting yourself apart from the rest of the applicant pool.

Good luck!

justin greis

hi, i'm justin

(nice to meet you)



I post weekly **professional insights** and **personal stories** from my life as a management consultant, a dad, and an eternal optimist.

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