

Case Study Strategy Cheat Sheet (Expanded)

Key Financial Metrics

Gross Margin = (Revenue - COGS) / Revenue

Operating Margin = Operating Income / Revenue

Net Profit Margin = Net Income / Revenue

Breakeven Point = Fixed Costs / (Selling Price - Variable Cost per Unit)

ROI = (Gain from Investment - Cost of Investment) / Cost of Investment

EBITDA = Earnings Before Interest, Tax, Depreciation, and Amortisation

EBITDA Margin = EBITDA / Revenue

Payback Period = Initial Investment / Annual Cash Inflow

Strategy Evaluation Checklist

- Does the strategy solve the root problem?
- Is it financially viable? (Check cost-benefit)
- Is it operationally feasible?
- Can it be implemented within 3-12 months?
- Are key stakeholders likely to support it?
- Does it align with the company's goals and capabilities?
- Circle to rate: Feasibility [Low] [Med] [High]

Risk Assessment Toolkit

Identify risk types: Market, Operational, Financial, Strategic

Use a Risk Matrix: Likelihood (Low/High) vs. Impact (Low/High)

Score each risk 1-5 on both axes, then multiply for severity (Max 25)

Colour code your matrix:

1-6 = Green (Acceptable)

7-14 = Yellow (Monitor closely)

15-25 = Red (Immediate action needed)

Mitigation Planning: For each major risk, define:

- Contingency Plan
- Timeline
- Responsible Owner
- Success Criteria

Executive Summary Structure

1. Context - What's the problem?
2. Findings - Key analysis insights
3. Recommendations - What to do
4. Risks & Mitigation - What could go wrong and how to handle it
5. Impact - Estimated outcome (quantify if possible)