David Ohrvall

CEO, Zintervu
Author of Crack the Case & Interview LOGIC

Wharton — UNIVERSITY OF PENNSYLVANIA

ICU 国際基督教大学 INTERNATIONAL CHRISTIAN UNIVERSITY Expanding Potential

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CRACK THE CASE

INTERVIEW LOGIC

World-Class Case Interview Training

Canada

Ivey School (UWO)
Queen's University
McGill University
U of Toronto
U of Calgary

United States

Amherst College
Berkeley Haas
Boston College
Boston University
Bowdoin College
Carnegie Mellon Tepper
Chapman University
Chicago Booth
Columbia
Colorado
Cornell
Darden
Dartmouth Tuck
Duke Fuqua
Emory
George Washington
Georgetown
Georgia Tech
U of Georgia
HBS
Iowa
IU Kelley
Johns Hopkins
Kellogg
Maryland
Michigan Ross
Michigan State

MIT
Minnesota
Notre Dame
NYU Stern
Ohio State
Olin WUSTL
Owen Vanderbilt
Pepperdine
Rice
Smith
Stanford
SMU
Temple
UT McCombs
Texas A&M
USC Marshall
UCLA Anderson
UC Davis
UC Irvine
UNC Kenan-Flagler

U of Florida
U of Washington
Wharton
William & Mary
Wisconsin
Yale

Europe

IE Madrid
INSEAD
Oxford Said
Cambridge Judge
Bayes, Imperial,
Trinity Dublin,
ESADE, SDA Bocconi
HEC

Middle East

INSEAD Abu Dhabi
American University Cairo

Asia – Pacific Rim

INSEAD Singapore
National University
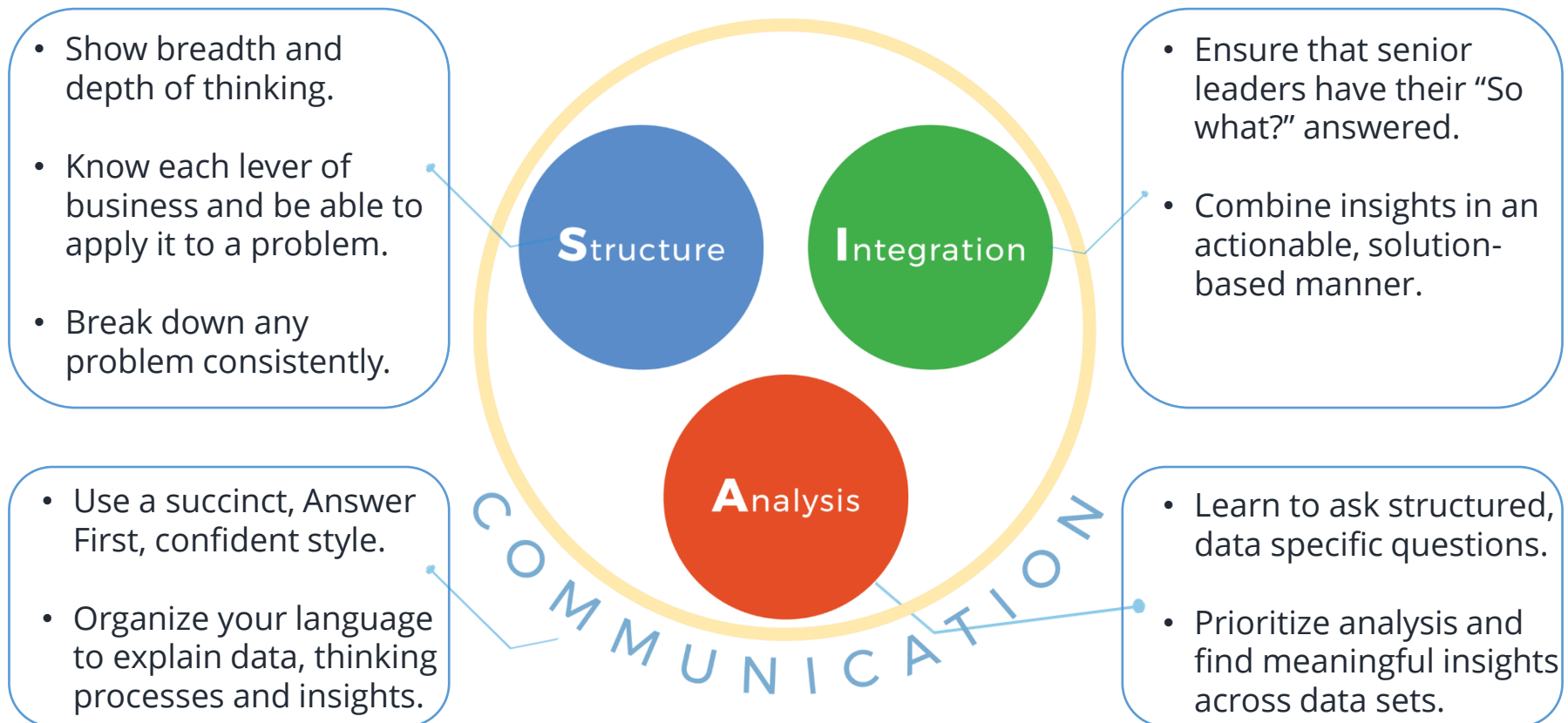**Singapore**
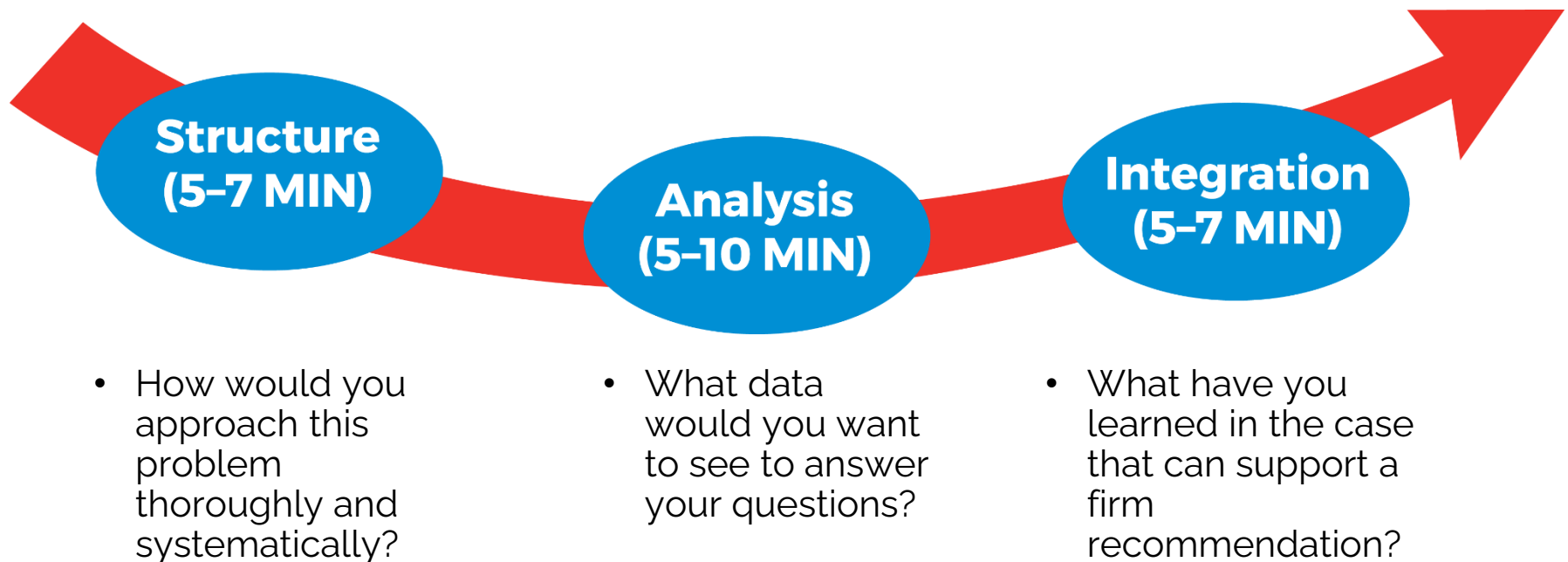**Hong Kong UST**
CEIBS Shanghai

Today's Agenda

- **Why do companies use cases?**
- What's a case interview?
- What type of cases will I face?
- How do I prepare?
- What does it take to get an offer?
- How do I get started right now?

Why do companies use cases?

They want to see a full set of skills.
CSAI: Communication, Structure, Analysis & Integration

- Show breadth and depth of thinking.

- Know each lever of business and be able to apply it to a problem.

- Break down any problem consistently.

Structure

Integration

- Ensure that senior leaders have their "So what?" answered.

- Combine insights in an actionable, solution-based manner.

Analysis

- Use a succinct, Answer First, confident style.

- Organize your language to explain data, thinking processes and insights.

- Learn to ask structured, data specific questions.

- Prioritize analysis and find meaningful insights across data sets.

COMMUNICATION

Today's Agenda

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What's a case interview?

Question: Should our fashion retailer open pop-up stores?

Structure (5–7 MIN)

- How would you approach this problem thoroughly and systematically?

Analysis (5–10 MIN)

- What data would you want to see to answer your questions?

Integration (5–7 MIN)

- What have you learned in the case that can support a firm recommendation?

CASES are EVERYWHERE

Consulting

- Strategic decisions
- Market entry
- Profit maximization
- Declining market
- Organizational redesign

Finance

- M&A transactions
- Private equity buy-outs
- Business sell-offs
- Time value of money

Marketing

- New product
- Lagging product
- New industry
- Branding remedies

Industry

- Airlines
- Health care
- Internet/telecom
- Government
- Internal strategy

How would you answer these business scenario questions?

Tech

"**What information** would you need to help develop the implementation strategy?

"Talk me through the options. What is your rationale for **choosing this application**."

"Our roll-out is **resource constrained**. What would you do first?"

"How would you determine if this product is worth **turning into an app**?"

How would you answer these business scenario questions?

Marketing

"Walk me through a **favorite marketing campaign** and why you liked it."

"Let's think through how to **increase overall brand awareness**."

"Let's **evaluate the roll-out** of our holiday scent air freshener. Should we do it next year?"

"Using the **4P's framework**, let me know how you would market a new line of high-end headphones."

How would you answer these business scenario questions?

Finance

"Let's walk through **a recent acquisition**. Name one that recently happened, what you think went well, and what should have done differently."

"I'll give you a million dollars. How **would you invest it and why**? What kind of return would you expect to get?"

"If you had to advise on a **merger between two food companies**, what would you want to know?"

"Think through **the trade-off** between these two investments."

How would you answer these business scenario questions?

Consulting

"Our client is **facing declining profits**. Should they shut down two of their five plants."

"A global beer company is looking at **acquiring** several smaller craft beer companies. **Should they do it**?"

"We are working with a company who is facing increasing competition from **private label pretzels**. What should they do?"

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Prepare by working on skills
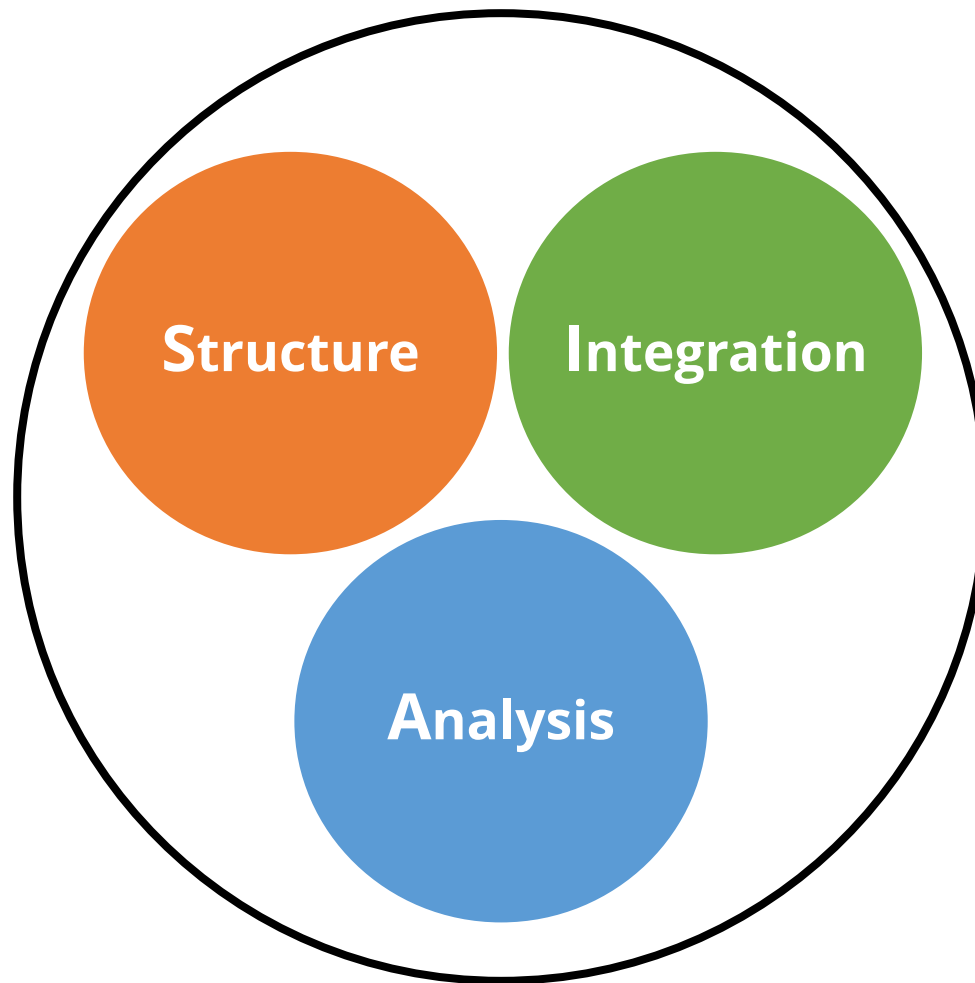
COMMUNICATION

Let's focus our attention on each part of the case.

Case Flow

Structure (5–7 MIN)

Analysis (5–10 MIN)

Integration (5–7 MIN)
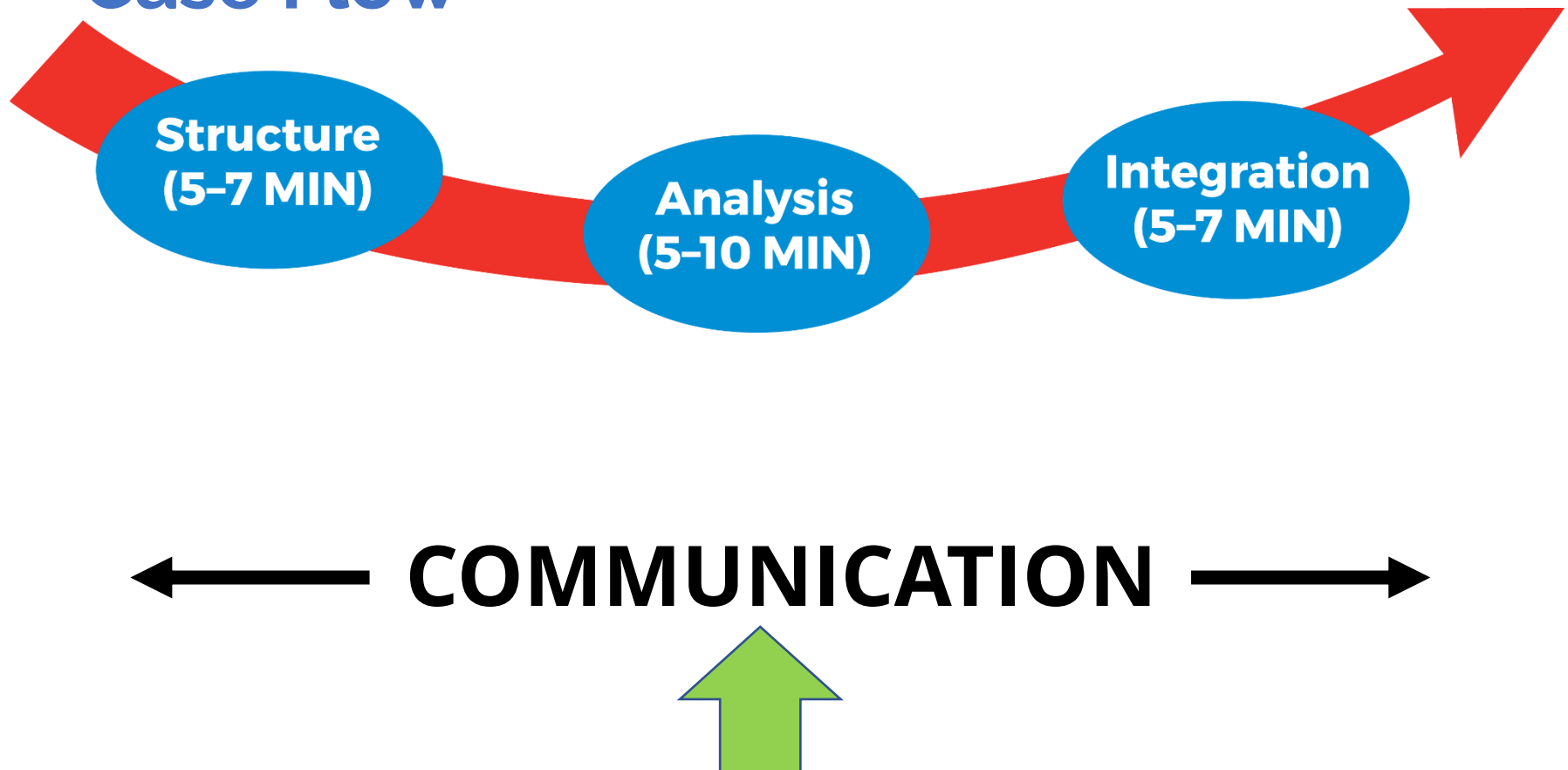
COMMUNICATION

Be Answer First

to engage quickly

- **Bring the main point to the front.**

- **Use data to engage your interviewer. Add in $, # and %.**

- **Apply Answer First to speed up the conversation.**

1. Communication – Answer First

- **Clear and Direct –** "There are two key issues I want to address."
  - Interviewers understand where you are going
  - You seem like a confident business advisor

- **Interaction Increases –** "Can we go back to your first point . . . ."
  - Interviewers want to test you thoroughly
  - When they quickly understand your thinking they can ask questions and converse with you like a peer

- **Your Speed Accelerates –** Time is one of your enemies
  - With AF you move faster through both your behavioral and case thinking
  - There's more time to go deeper, analyze data, answer questions and cover more ground in your behaviorals

Use Answer First for your behavioral prep
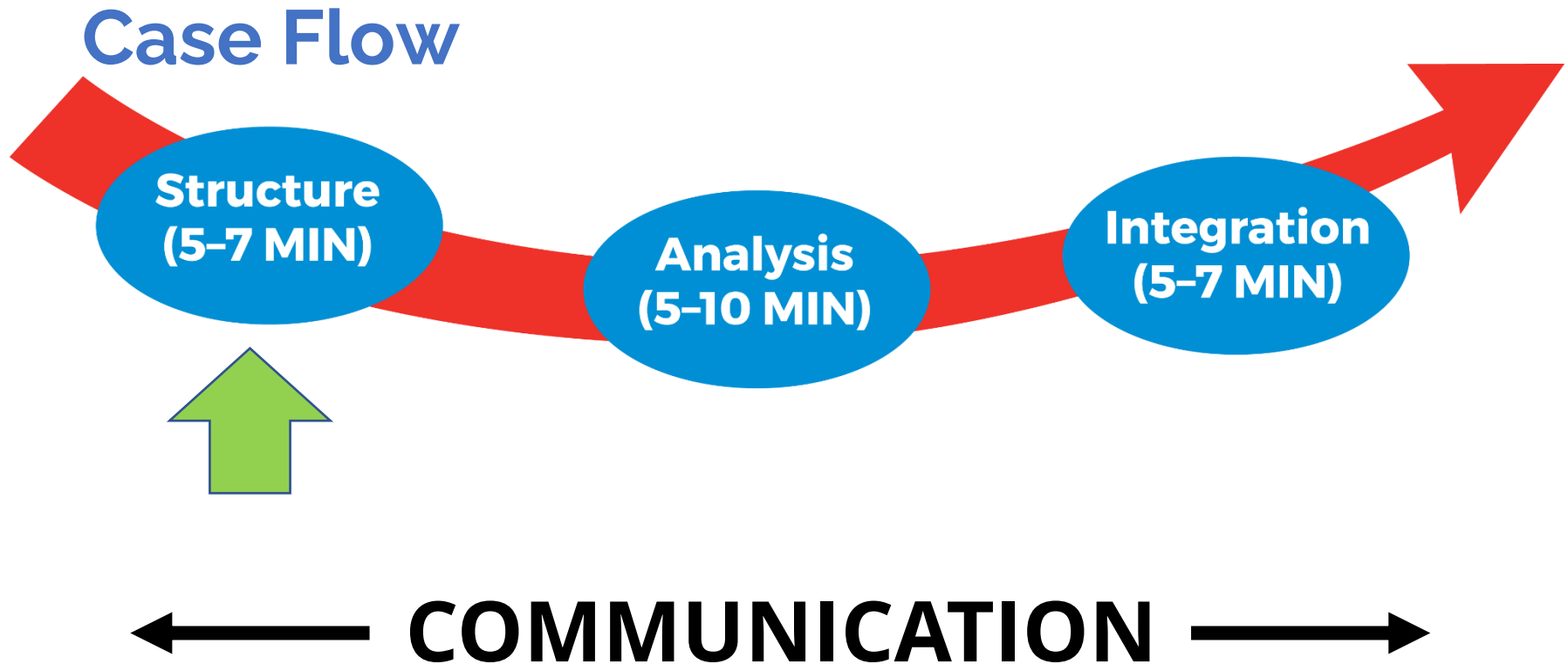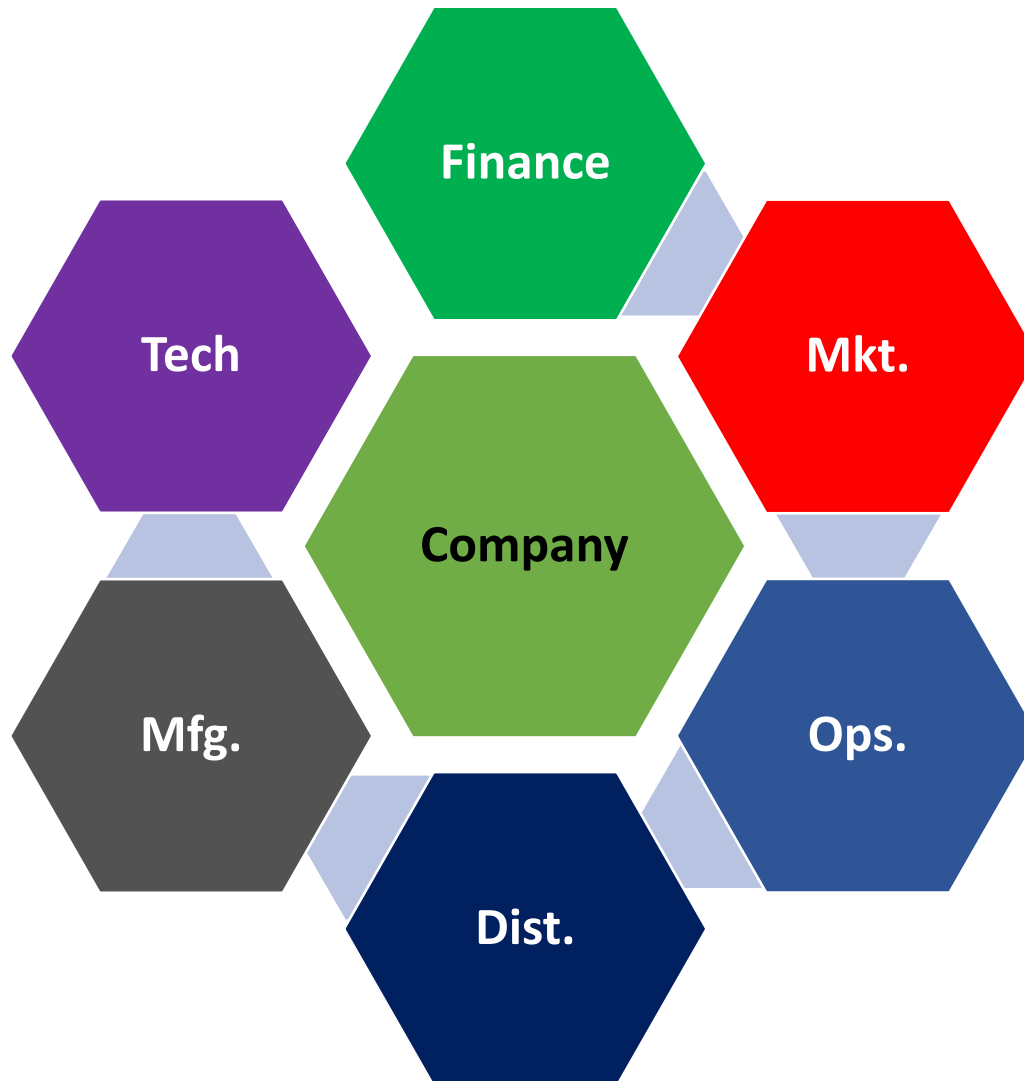
I ndividual Contribution

M anage or Lead

P ersuasion

A nalytics

C hallenge or Failure

T eamwork

Let's focus our attention on each part of the case.

Case Flow

Structure
(5–7 MIN)

Analysis
(5–10 MIN)

Integration
(5–7 MIN)

← COMMUNICATION →

2. Structure – Consider all the angles

BREADTH ≠ reciting a memorized laundry list

Top candidates curate & prioritize in real time

# Harry's - a stylish, cheaper men's razor
How do you help them win?

- **Function** - quality of shave, feel in hand, durability of blades, ease of cleaning
- **Style** – color options, sleek design
- **Portfolio** – multiple types? Shave cream?

- **Mtg channel:** Social media for a Gen X/Z target
- **Messaging:** "You're paying too much!", socially conscious
- **Pricing:** Trial offer. Subscription discount

Product | Marketing

Harry's

Financing | Operations (Manuf., Distribution, Customer Service, etc.)
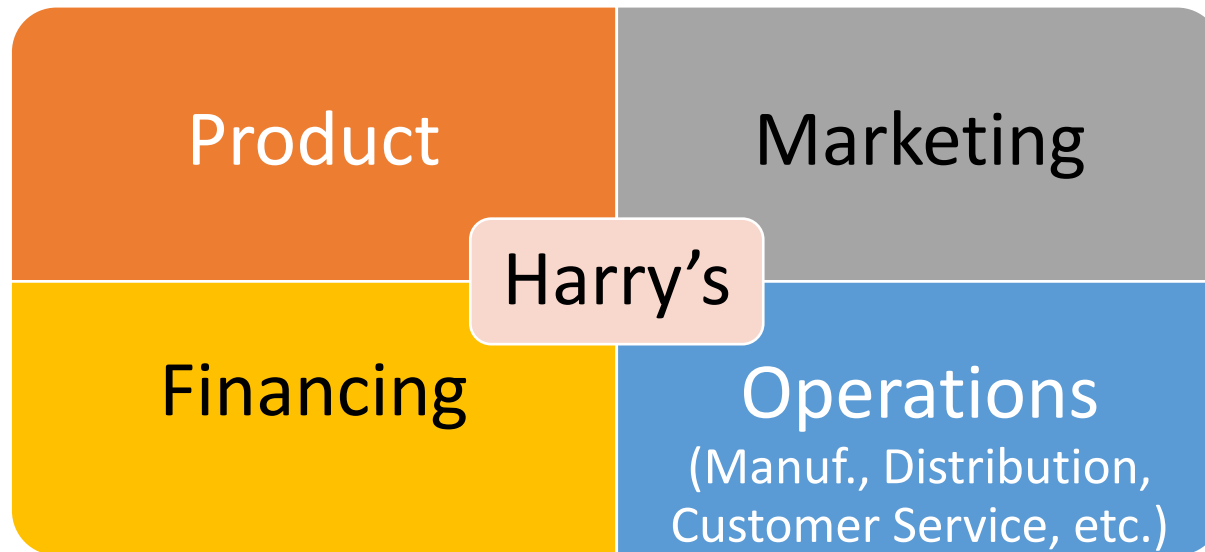
- **How much money do we need?:** Initial investment, marketing budget, incremental capital to scale
- **How are we going to fund it?:** debt, equity, self-fund?
- **ROI:** Expected product margins / breakeven point
- **Exit strategy:** Get acquired by large CPG? IPO?

- **Manuf:** In-house production or outsource? Where to do the manuf
- **Sales channels:** Direct to consumer, through retail stores, or Amazon/other online partners
- **Back office support:** Where to put HQ? Remote workforce?

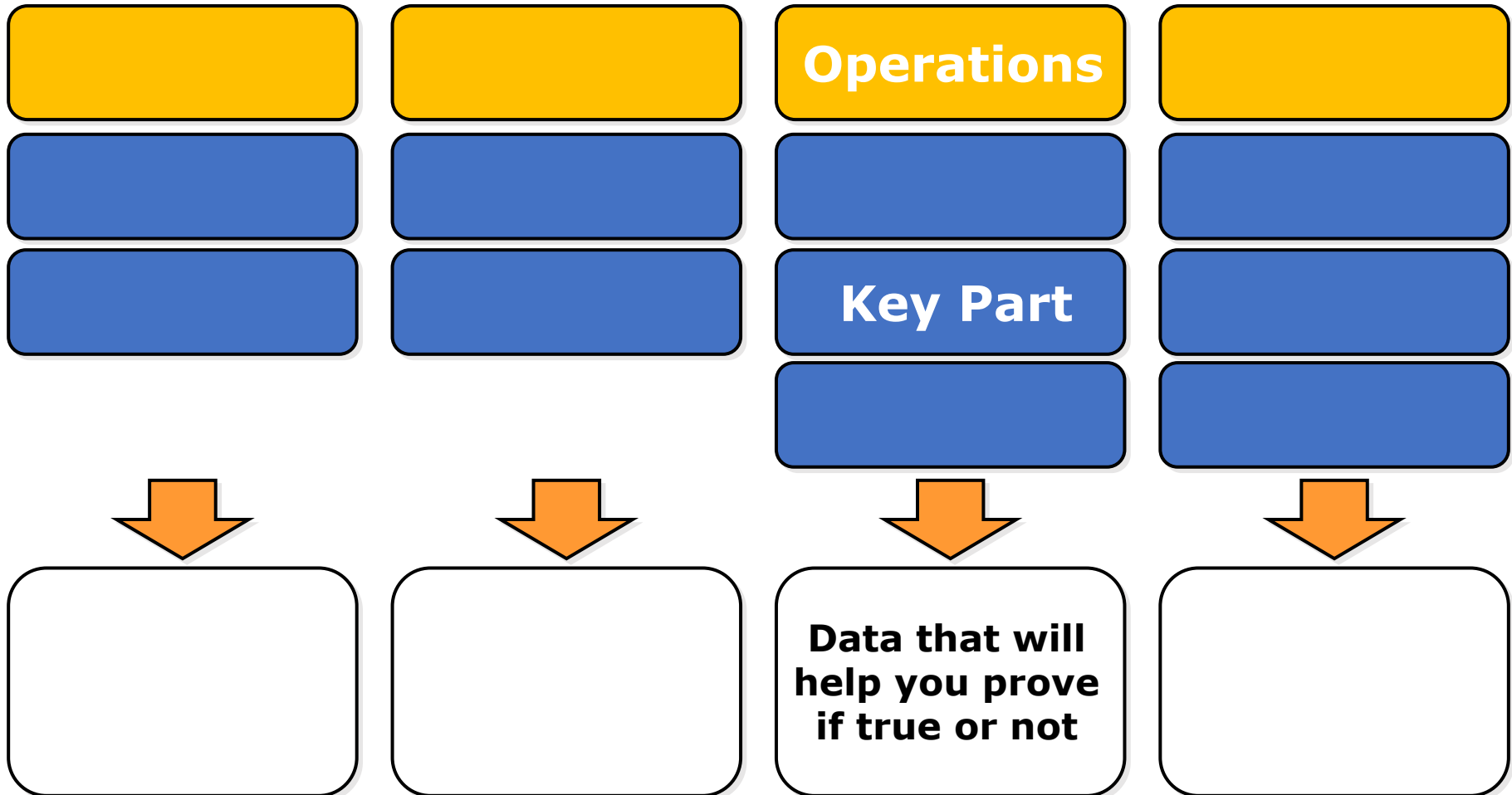# Block, Break & Ask is the foundational skill
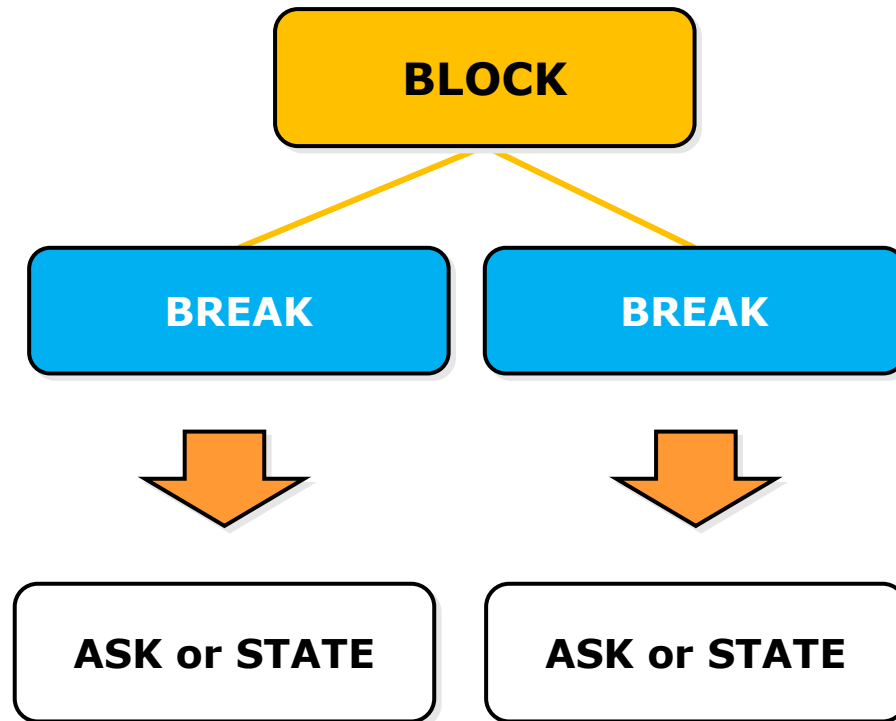
BLOCK

BREAK   BREAK

ASK or STATE   ASK or STATE

Separate categories

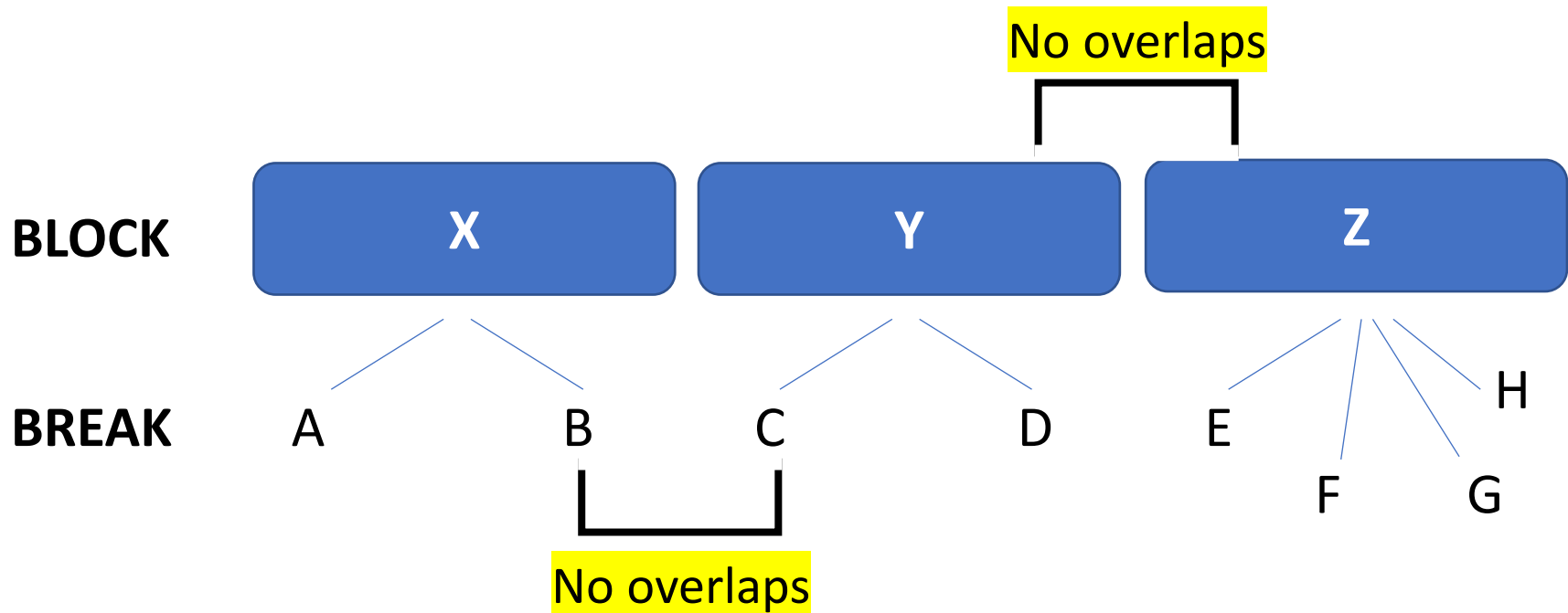**Being case specific preps you to anticipate data. "Micro" hypotheses start to bubble up.**

Mention the specific $, # and % that you need. Be ready to transition to the analysis portion of the case.
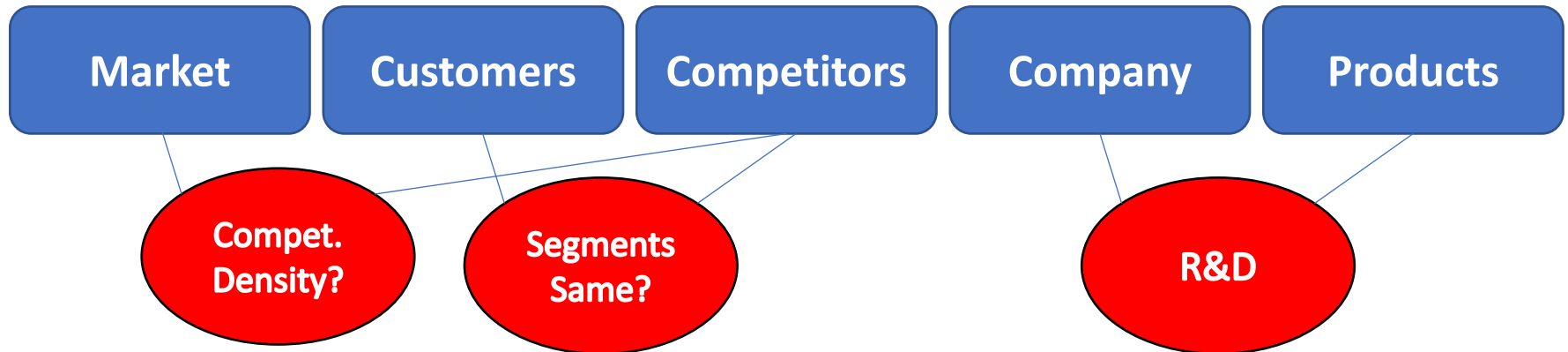
2. Structure – Use a hypothesis

		Operations	
		Key Part	

		Data that will help you prove if true or not	

2. Structure – Be MECE when possible

Mutually Exclusive, Collectively Exhaustive

No overlaps

BLOCK	X	Y	Z

BREAK A B C D E F G H

No overlaps

ASK $, # and %

Let's focus our attention on each part of the case.

Case Flow

Structure (5–7 MIN)

Analysis (5–10 MIN)

Integration (5–7 MIN)

← COMMUNICATION →
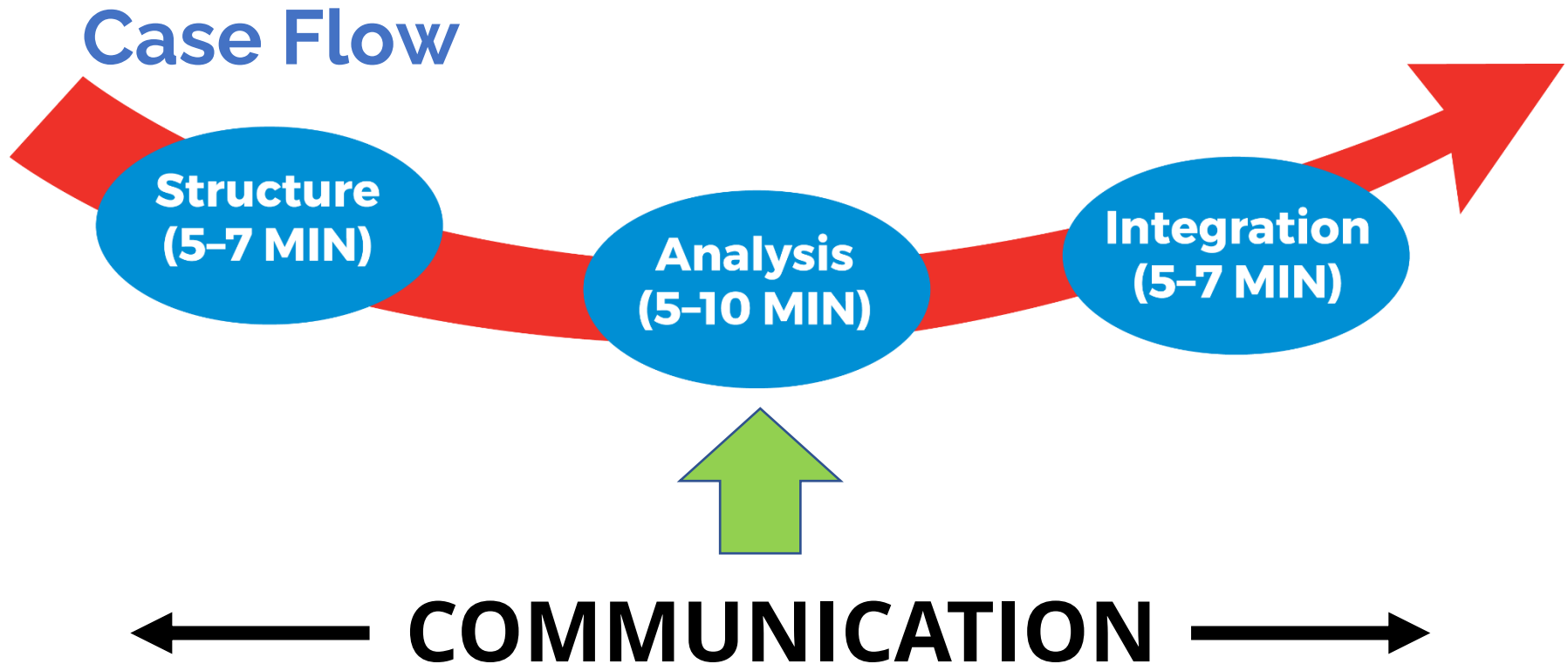
3. Analysis – It begins with data anticipation
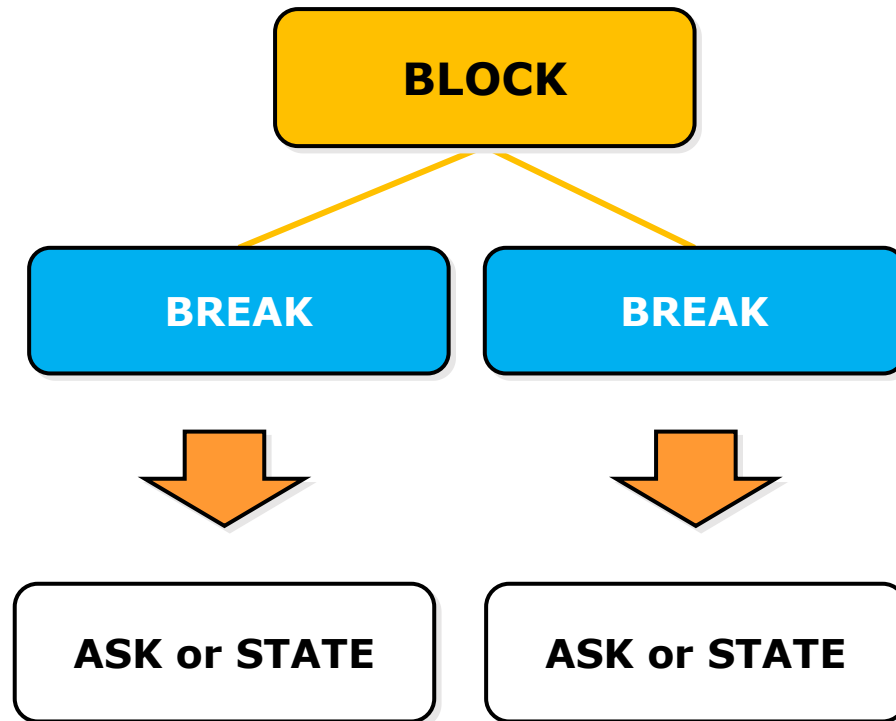
BLOCK

BREAK   **BREAK**
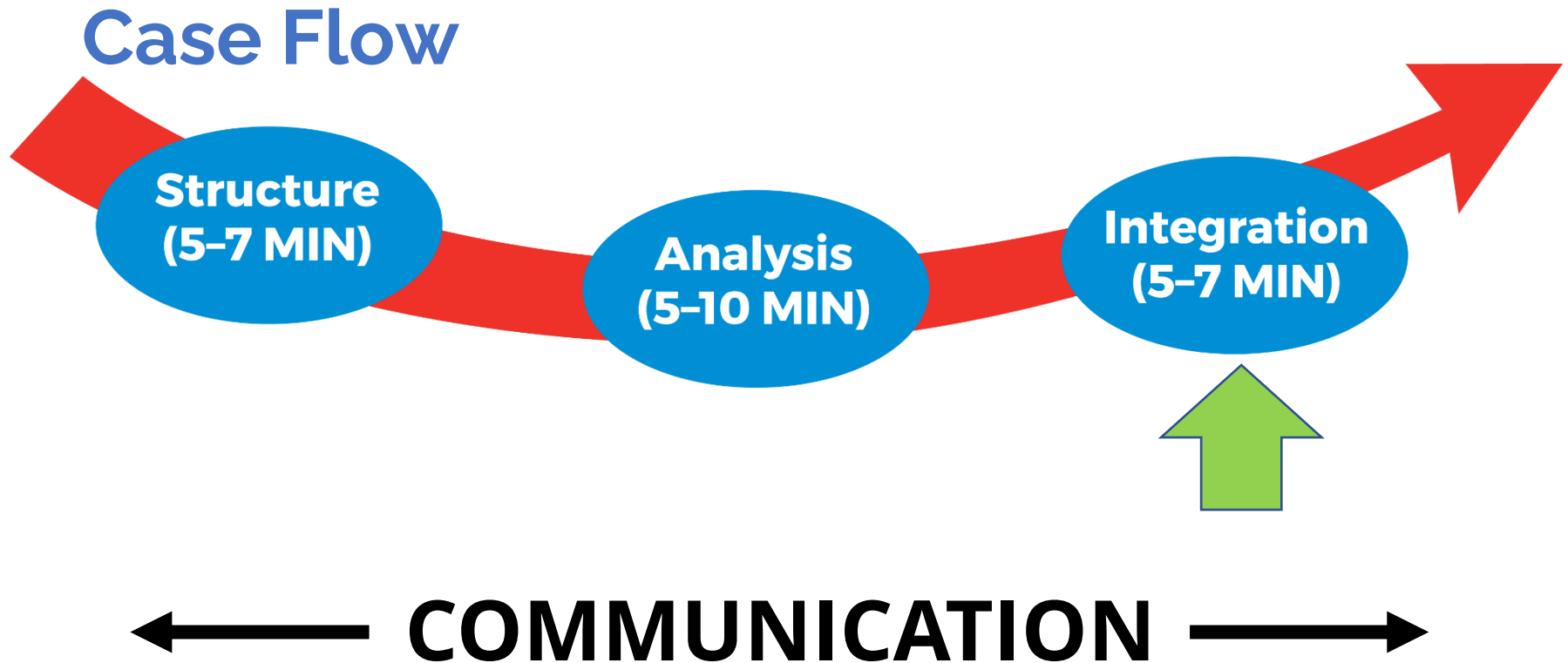
ASK or STATE   **ASK or STATE**

Separate categories

Being case specific preps you to anticipate data. "Micro" hypotheses start to bubble up.

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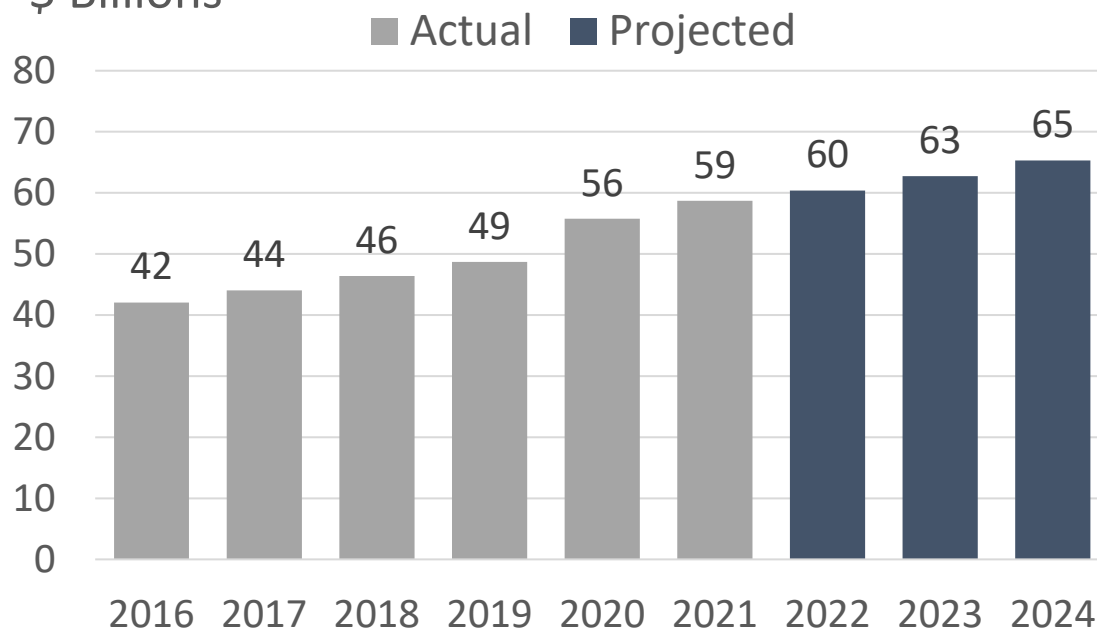# Let's focus our attention on each part of the case.

4. Integration – Focus on insights

Nutritional Supplement Market Trends
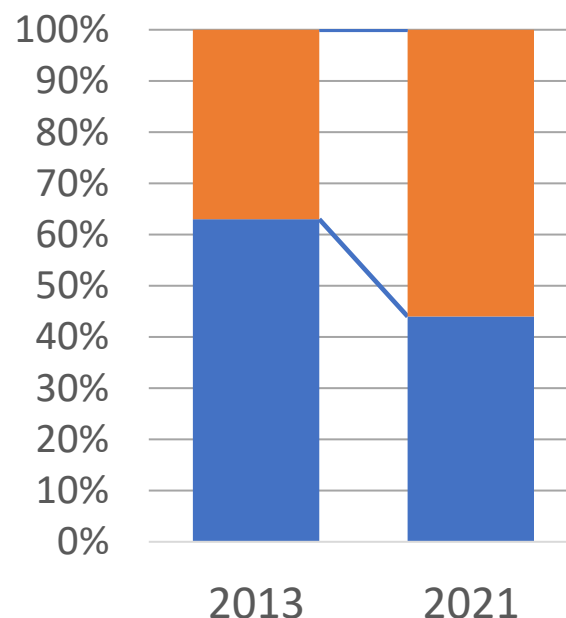(Vitamins, minerals, herbal supplements, sports nutrition, meal supplements, etc.)

US Nutritional Supplement Sales
$ Billions

- Actual
- Projected

Year	Value
2016	42
2017	44
2018	46
2019	49
2020	56
2021	59
2022	60
2023	63
2024	65

Sales by form*
% of total sales

- Pill
- Non-pill

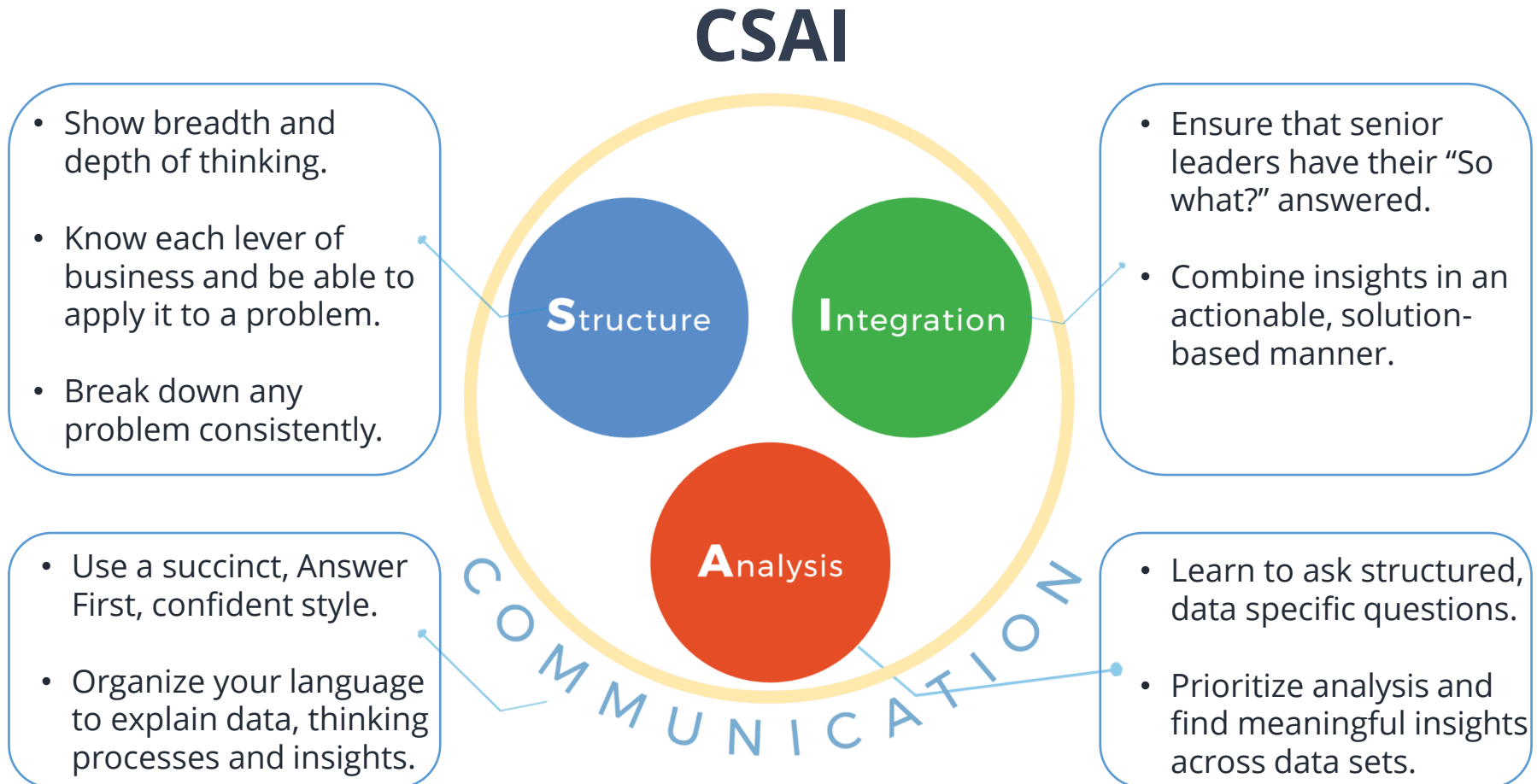*Pills includes: tablets, capsules, softgels and VegiCaps*
Non-pills includes: chewables, gummies, powders, liquids, injections, lollipops/lozenges, etc.

Source: Nutrition Business Journal

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Getting offers = showing solid skills

CSAI

- Show breadth and depth of thinking.
- Know each lever of business and be able to apply it to a problem.
- Break down any problem consistently.

Structure

Integration

- Ensure that senior leaders have their "So what?" answered.
- Combine insights in an actionable, solution-based manner.

Analysis

- Use a succinct, Answer First, confident style.
- Organize your language to explain data, thinking processes and insights.

COMMUNICATION

- Learn to ask structured, data specific questions.
- Prioritize analysis and find meaningful insights across data sets.

Case format can vary

CRACK
THE CASE
TRAINING

One-on-One	Small Group	Analysis Only	Analyze & Present
• Most typical format	• Usually final round only	• You and a computer or paper exam	• You, blank slides, and a case
• Interviewer style and case content vary widely	• Rare but growing in popularity	• Usually a threshold test	• Present to 2–3 people
• Be ready to drive the discussion	• Listen and collaborate!	• Emphasis on quant skills	• Have a tight storyline and solid recommendation

Interviewer approach can vary

**Blue
Sky Hypothesis**

Interviewer's recent
work content

"What do you think?"

Wide open
Hypothesis-driven
Candidate-driven

Continuum

**Command
and Control**

Company-developed
case content

"Please solve this equation."

Specific steps
Specific problems
Interviewer-driven
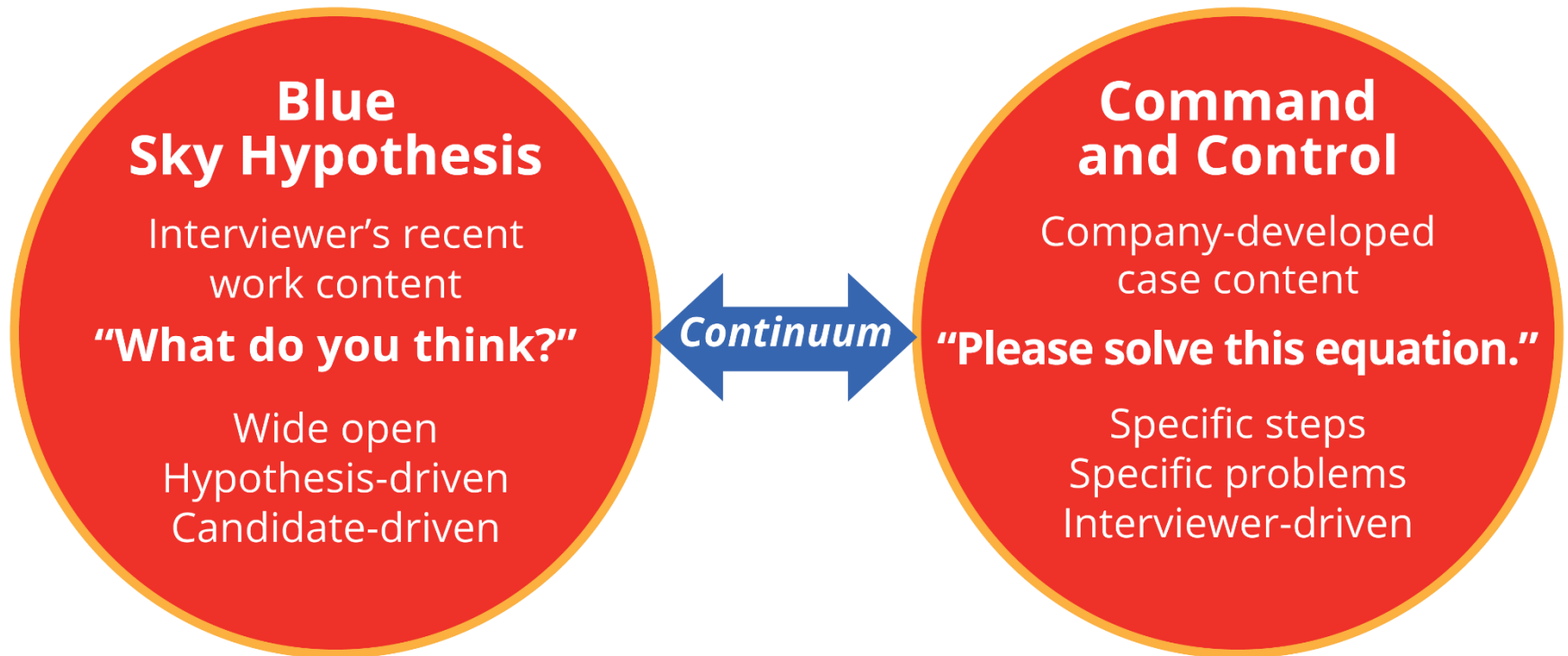
Interviewer personalities vary

Silent Partner

- Doesn't say much
- Hard to read

Chatty Charlie

- Jumps off topic
- Feels frenetic

Data Director

- Wants facts only
- Pushes for insights

Firm approach varies

Bain & Company

Boston Consulting Group

McKinsey & Company

Disney

Samsung

Shell

Home Depot

Google

Branding

HR

Technology Integration

Risk Management

Hospital Management

Generalist Consulting

Firms that advise a broad set of companies and industries may give you a case on any topic. A firm's recent client work may show up in your case!

Company-Specific

Expect cases that are centered on their specific industry and day-to-day problems. Be sure to read up on their most recent challenges and products.

Industry-Specific

Fims that advise in specific industries will give cases on those topics. Educate yourself on current challenges and trends.

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Think in phases

Typical Case Interview Journey

"I like this! This is my future."

Cases are fun and I'm learning so much!

"Let's dig in. Bring it on."

This analysis is cool. I have so much to learn!

"This is like running into the wind."

This is getting too hard. I'm not getting better.

"I've built long lasting skills!"

I'm glad I pressed on. It was worth it.

What can I do to prepare now?

Case Communication

TIPS

- Keep your answers under 90 seconds
- Get to the point quickly
- Explain your logic
- Anticipate questions
- Give a firm recommendation at the end

Get familiar with frameworks, but don't over-memorize.

CRACK
THE CASE
TRAINING

PEST Analysis
SWOT Analysis
Six Sigma
Diamond Model
4 Ps
BCG Matrix
Porter's 5 Forces
VMOST
Gap Analysis
Ansoff Matrix
VRIO Analysis
Profit
GE-McKinsey Nine-Box Matrix
3 Cs
Experience Curve
Product Life Cycle
Value Chain Analysis

Avoid ROBOT MODE!
Be Case Specific
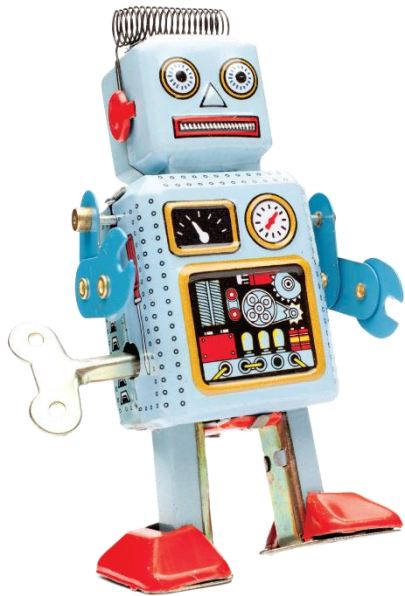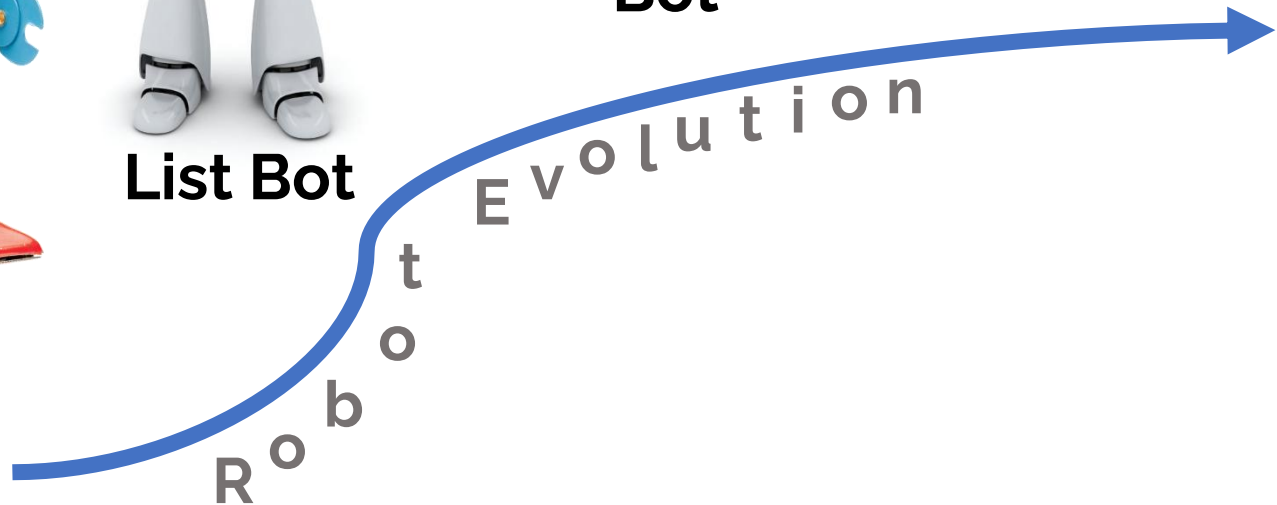

Quest Bot
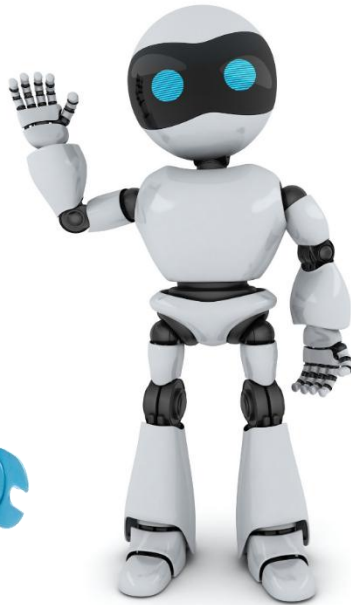
List Bot

Hypothe Bot

True "AI" Authentic Intelligence

Robot Evolution

Stay disciplined and balance solo practice with partner practice

Invest the time	Drill, drill, drill	Get the feedback

- **Muscle** – You build this over time. Cramming is not effective.

- **Reps** – Get volume and variety at first, then focus on quality

- **Weak Spots** – They won't go away on their own.

- **Consistency** – Stick to a schedule is key - even if the sessions are short

- **Calibrate** – Find seasoned interviewers to get good insights

- **Fine tune** – Conflicting advice is normal. Focus on the major and expect different prefs and styles

Offered on Two Dates

- Master Trainer, David Ohrvall
- Sunday, Nov 2, 4:00-7:30pm ET
- Sunday, Nov 16, 4:00-7:30pm ET
- Seating Limited
- $75 per seat

CSAI Skills (Comm, Structure, Analysis & Integration)

Being Answer First

Structuring with Block, Break & Ask

MVM Model and How to Get Unstuck

MBACASE Path

Full Case with Video – hIQ Tea

Market Sizing

Workbook Assignments

 - Advanced Math Must Haves

 - How to Be a Great Case Giver (and build your candidate skills)

 - 3 Cases with Detailed Answers

Download our Quick Start Guide, get today's slides, sign up for CTC1.

CRACK THE CASE
TRAINING

David Ohrvall
david.ohrvall@zintervu.com

Linked in
davidohrvall