

Comprehensive Case Analysis and Strategic Intervention Planning

A Structured Approach to Diagnosing Problems,
Implementing Solutions, and Evaluating Outcomes



Case Title & Overview (What to expect)



Case Title and Setting

Case title, setting (clinical or business), and presenting role (medical resident or business student)



Objective of the Case

One-sentence objective: what decision, diagnosis, or improvement this case supports



Presentation Roadmap

Roadmap of the presentation sections (profile → challenges → analysis → interventions → plan → outcomes → takeaways)



Patient/Company Profile (Who/what we are working with)



Core identity

patient demographics/clinical context or company mission/business model



Baseline status

current health indicators or current performance metrics and constraints



Stakeholders & priorities

patient needs/caregivers or leadership, customers, regulators, internal teams

Symptoms / Market Challenges (What is going wrong)



Primary Problem Statement

The main symptom cluster or the key market/business pain



Supporting Evidence

Frequency, severity, duration (clinical) or churn, conversion, latency, cost drivers (business)



Impact Mapping

Harms and risks (clinical) or revenue, retention, compliance, operational risk (business)

Diagnostic Process / Analysis (How we explain it)



Hypothesis generation

differential diagnosis or root-cause candidate list



Data collection & validation

tests/interviews/metrics, and what confirms or refutes hypotheses



Analytical approach

frameworks (clinical reasoning or business analytics) and key assumptions



Synthesis

most likely cause(s), evidence strength, and remaining uncertainties

Structured Evidence Tables (Templates you can reuse)

Evidence item	Hypothesis link	Confidence	Notes
Symptom or metric	Cause candidate ID	High/Med/Low	Source + timeframe
Test result or KPI trend	Cause candidate ID	High/Med/Low	Method + limitations

Proposed Solutions / Interventions (What we will do)



Intervention Set

2-4 options grouped by mechanism (clinical pathway or business levers)



Clinical/Business Rationale

Why each intervention targets the most likely cause(s)



Expected Effect

Anticipated changes in outcomes and how success will be measured

Execution Plan (How we deliver safely and on time)



Plan phases

preparation → implementation →
monitoring → iteration



Roles & responsibilities

owners for clinical tasks or
functional workstreams



Operational workflow

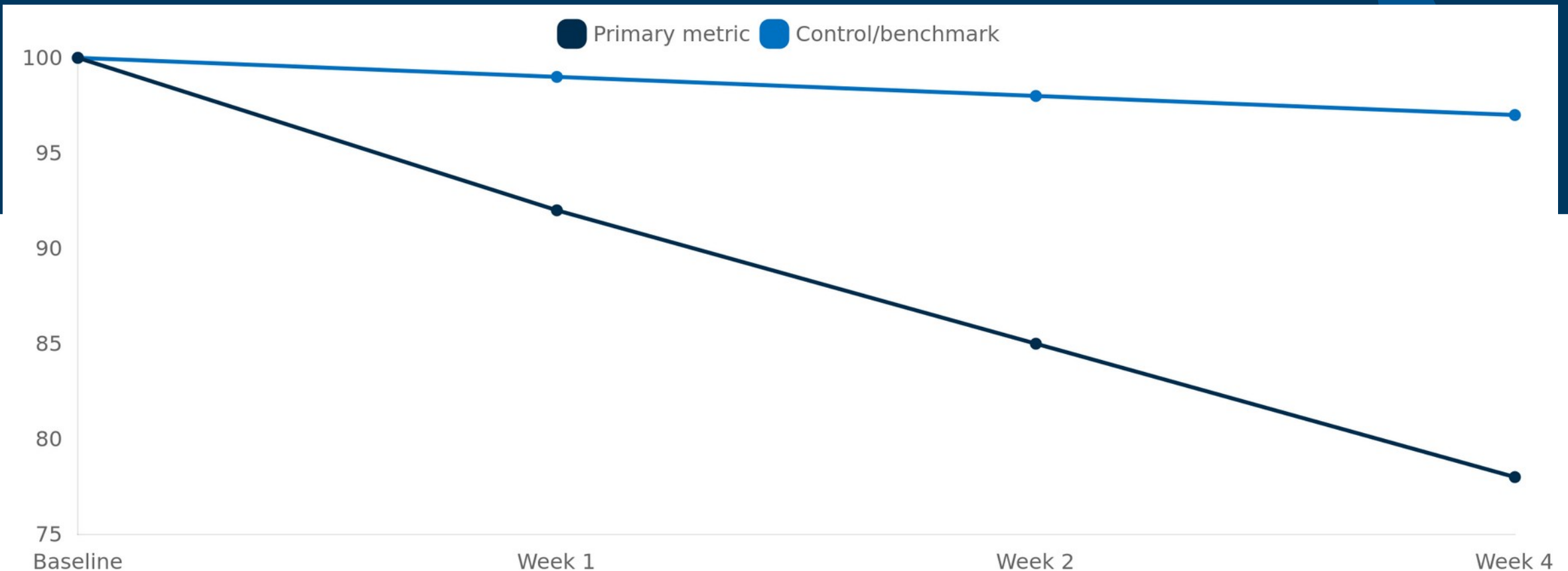
timeline, dependencies, and
escalation triggers



Governance

review cadence, quality checks,
and stop/continue criteria

Outcomes / Results (What changed and why)



Visualization Toolkit (Clear placeholders for senior peers)



Visualization placeholder set

waterfall (contribution)

funnel (conversion)

risk heatmap (severity × likelihood)



KPI dashboard placeholder

top 5 metrics with definitions

targets

measurement cadence



Clinical-style pathway placeholder

symptom → tests → diagnosis →
intervention → endpoint diagram

Key Takeaways (What seniors should remember)

Most likely root cause(s) and the single best piece of evidence supporting them

- Most likely root cause(s) and the single best piece of evidence supporting them

Intervention(s) chosen, with the measurable outcomes they are expected to improve

- Intervention(s) chosen, with the measurable outcomes they are expected to improve

Execution lessons: what worked, what to monitor, and what would change next time

- Execution lessons: what worked, what to monitor, and what would change next time