The Art of Case Writing

An overview of the Conference on Case Writing at Babson College – 9/28/01

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Conference Background.

Eight members of Ancell School of Business including myself attended a seminar on case writing at Babson College in Massachusetts on Friday September 28, 2001. The seminar ran from 8:30am – 5:30pm with a new topic in case writing and a new speaker being featured every 30 to 45 minutes. The seminar went at a fast pace and offered both a large volume of information and diverse viewpoints.

What is a Case?

A case is a thought-provoking instrument based on research and industry knowledge that has a teaching agenda, which facilitates bringing real world situations into the classroom.

Unlike an article in a business magazine a case author shouldn’t attempt to lead the reader to a clear-cut solution and there is no right or wrong answer to the problem at hand. If the problem in a case can be answered with a definitive yes or no than the case writer hasn’t provided a thought provoking case.

What makes up a good Case?

A good case should be interesting to read while laying out the framework for a business dilemma. Characters should be used so that readers can identify real people with the problem at hand. Great care should be taken to include sufficient data, background and supporting facts to assist the reader in arriving at proposed solutions to the dilemma. If there is a large amount of supporting data than it should be relegated to the end of the case in the form of exhibits, otherwise supporting material should be intermingled throughout the case document.

The issue of maintaining creditability with the audience is essential in case writing as a case must be free of bias and a company’s public relations agenda.

The format, size and shape of a case can vary greatly and is largely dictated by a combination of factors such as the intended audience, the funding source, the reviewing body and research style of the team developing the case.

The experts in our seminar offered a number of differing samples on formats of cases that ranged from single page to fifteen pages as well as examples of several multi-million dollar web-based formats that are designed for asynchronous instruction.
**Cases benefit faculty, students and the academic community.**

Cases can help to create instant credibility with students as they demonstrate the real world knowledge of the professor and their ability to get under the hood of industries and companies.

Targeted, topical and interesting cases allow the professor to challenge students in situations as close as possible to the real world while keeping everyone current. Cases can lead to making the classroom experience richer through two-way discussions and interaction with students since class participation is important to the learning model.

In many Colleges & Universities cases count as published works for faculty when being considered for promotion or tenure. Widely distributed cases can help to enhance the academic reputation of the Professor, which can potentially lead to additional research and consulting opportunities.

A number of collaborative organizations exist, such as North American Case Research Association, with the purpose of sharing published cases amongst educators. The deliverables required for published cases are much greater than those required for cases that will be used exclusively by the author in their classroom. Published cases usually must include teaching notes, an instructor’s manual and recommendations on the potential target audiences for the case.

**Developing cases and methodology.**

The case starts with an initial idea of a problem to be explored. The problem can be a business issue, a technical situation or an ethical dilemma that must be confronted by an organization.

An agreement with the subject company should be worked out ahead of time as to what will be done and what company resources will be made available to the case researchers. It is advisable to set expectations early on with the company so that they fully understand the purpose of the case research, what is required of them and that the ultimate intent is to publish the case for classroom use.

Field case researchers will often have to go onsite to interview relevant company personnel, collect data, get a sense of the facility and to review materials. The field researchers should be as prepared as possible before arriving at the company by reviewing basic background information in as many public documents as possible. Additionally field researchers should bring all of the tools that they will need to assist them in the field investigation.

The field researcher will usually return with a large assortment of data in various forms such as: notes, tapes, company documents, DVD, marketing hype and some souvenirs. It may be necessary to make several onsite visits to collect all of the data needed before assimilating this raw data into a central document that tells the story of the case.

The appropriate legal agreements should be worked out and the proper signatures obtained before using proprietary or confidential material in a published case.
ROI and the cost of Cases

Cases can run the gamut of being inexpensive to being very expensive to produce.

Keeping the cost of a case down is quite possible by employing research students and research assistants to do the bulk of the work on the case under the watchful supervision of the team leader, which is usually a faculty member.

The costs will be higher if the faculty member does the majority of the case research and development on their own. Costs really start to soar when supplies, telecommunication, travel and special formats such as multi-media are required.

It is important to look at the cost benefits of doing a case. In particular the direct cost and opportunity cost must be measured against the value and the expected life of the case. The value of a case to the author can be determined based on how many times the case can be used in a classroom thus reducing the preparation time for other materials. Also the value of a case can be much greater for the author in terms of professional capital if the case is widely distributed to other educators.

Some cases, such as in the technology field, have very short life spans. So it is important to carefully weigh out the value of the case verses the cost in terms of how long the case will live for. Many case authors find themselves in a position of never getting their cases completed before technology or the marketplace makes their topic obsolete.

Conclusion

Current and topical cases offer a faculty member the ability to bring real world situations into the classroom for the purpose of generating potentially interesting, meaningful and thought-provoking discussions with students.

Cases can be developed by a faculty member for specific use in their classes or cases can be developed for wider use in the academic community. Faculty members can also draw on the case works of other professors for use in their classes as well.

Supporting web references on Case Study usage in business curriculum

1. The Art of Case Writing, A One Day Seminar and Workshop on Case Writing at Babson College - http://www.babson.edu/artofcasewriting/Intro.htm