Turning Existing Teaching Material Into Compelling Cases
Federation of Business Disciplines Annual Meeting, Oklahoma

Presented by Scott Andrews, University of Worcester, UK

On behalf of The Case Centre

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Turning Existing Teaching Material into Compelling Cases

1. What makes a ‘Compelling case’?
2. Why use the case method?
3. What sources of existing class data would you select for a case?
4. Is this a good story? If so why?
5. What is the focus of the case?
6. How does the case connect with Key Learning Objectives?
7. What does the learner have to do?
8. How does the material enable the tutor to keep the learner on board?
9. How does a Case differ structurally from other class resources?
10. How do you evaluate its effectiveness?
Student discussion of a planned sequence of cases, drawn from actual situations, with responsibility for analysis and conclusions about issues within the case resting with the students.

The case “teacher’s” role is seen as one of learning facilitator - guiding student discussion, rather than providing answers.

The focus is on student learning through their own individual and joint efforts.
Value of the case method?

Talk to me and
I will listen

Show me and
I will observe

Involve me and
I will learn
A case study (or a case) is a description of a situation, or an account of a sequence of events, which raises issues for discussion and/or problems for analysis and solution.
What makes a good case - IMD?

- It fulfils pedagogic objectives
- Tackles a relevant important issue
- Has a personal touch
- Provides currently useful generalisations
- Contains contrasts and comparisons
- Has the data required to tackle the problem, but not too much
- Is controversial
- Is short
- Is well structured and easy to read

Abell, D., ECCHO, Fall 1997
Case Writing according to RSM, Rotterdam

- A case, not just a story
- Situation-specific, fresh topic
- Relevant, important issue
- Objective, in perspective
- Broad enough to allow generalization
- Specific enough to allow thorough exploration
- Personal touch
- Contrasts, tensions, controversy, or other dramatic elements
- Layers (immediate & root issues)
- Well structured and easy to read
Most popular global cases....

- Cases with a simple and clear focus
- A hot topic with broad relevance
- Shorter cases (10 pages or fewer)
- Cases about emerging economies
- Cases with teaching notes that also have concrete assignment questions or exercises
- Role plays and exercises (instructions have to be very clear)

Source RSM, Rotterdam
Case studies can provide practise in:

- Analysis and critical thinking
- Decision making
- Judging between courses of action
- Handling assumptions and inferences
- Presenting a point of view
- Listening to and understanding others
- Relating theory to practice

adapted from J.Heath (1998)
So what is the focus?

Leadership?
Management?
Branding?
Quality?
Decision making?
Stakeholders?
Strategy?
Research Case vs Teaching Case

- **Research case**
  - description
  - explanation
  - faithfulness
  - chronological
  - no perspective(s)
  - little or no drama

- **Teaching case**
  - story
  - embedded in the story
  - often twisted and highlighted
  - not always
  - protagonist(s)
  - preferring drama and controversy

*Source RSM Case Centre*
Experiential learning model

Concrete experience
Have an experience

Observations and reflections
Reflect on the experience

Testing implications of concepts in new situations
Try out what you have learned

Formation of abstract concepts and generalisations
Draw conclusions from the learning experience
There are three ways to classify the case:

1. Types of case – content
2. Mode of treatment of the case data
3. Presentational formatting
1. Types of cases

- Incident case
- Background case
- Exercise case
- Situation case
- Complex case
- Decision case
2. Mode of treatment of case data

- Field or Desk Research
- Simple or complex, Long or short
- Single or multiple issue
- Issue raising vs problem solving
  vs problem identification vs decision making
- Perspective - level of management
- Inductive or Deductive
- Divergent or Convergent
3. Case Presentational Formats

- As a single case or in bite size pieces?
  - Chicken and egg case
  - Sequential case
  - Envelope case
- Additional materials
- The development of the teaching note/Map
- Media format
  - Paper based
  - Video based
  - Web based
  - Interactive CD-ROM
The case map

- Provides a framework for a journey
- The starting point – what do the students bring into the classroom
- The destination – key learning objective
- Interesting visiting points (analysis)
- Directions – carefully crafted questions
Case teaching plan

Case title: __________________

Data - Map - People

Target learner group: ________________

Class prerequisites

Carefully crafted questions – directing

Interesting visiting points – analysis

Key learning objectives

Starting point

Destination point

Orientation and mode of treatment of the case __________________

_______________________________________________________

_______________________________________________________
Teaching notes - latest update

• As of December 2015 46% of cases in The Case Centre collection had teaching notes. However, for the 50 most popular cases this figure rises to 95%.

• Average 1485 teaching notes downloaded from thecasecentre.org each month

• Length of teaching notes
  • Longest: 120 pages
  • Shortest: 1 page
  • Average: 11 pages
<table>
<thead>
<tr>
<th>SCHOOL</th>
<th>TITLE OF CASE</th>
<th>DISCIPLINE</th>
<th>NO. PAGES</th>
<th>FIELD DESK</th>
<th>TN?</th>
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<td>Unilever in Brazil (1997-2007)</td>
<td>Marketing</td>
<td>22</td>
<td>F</td>
<td>Y</td>
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<tr>
<td>HBS</td>
<td>Wolfgang Keller at Koningsbrau-Tak (A)</td>
<td>HRM/OB</td>
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<td>Cola Wars Continue: Coke and Pepsi in 2010</td>
<td>Strategy and General Mgmt</td>
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<td>Zara : Staying Fast and Fresh</td>
<td>Prod &amp; Ops Management</td>
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<tr>
<td>HBS</td>
<td>Aqualisa Quartz: Simply a Better Shower Solution</td>
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<tr>
<td>HEC (Paris)</td>
<td>Michelin Fleet Solutions : From Selling Tires to Selling Kilometres</td>
<td>Marketing</td>
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<td>CIBER</td>
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<td>F</td>
<td>Y</td>
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<tr>
<td>Babson</td>
<td>Intelligent Medicine: The Novartis-Proteus Alliance (Japanese version)</td>
<td>Marketing</td>
<td>8</td>
<td>D</td>
<td>Y</td>
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</table>
The case teaching note

- Summary of the case
- Teaching objectives and target audience
- Teaching approach and strategy
- Analysis
- Additional readings or references
- Feedback
- What happened next
TN - additional functions

• New perspective on case
• Discussion notes
• Assignment questions
• Teaching questions
• Time span
• What happened next….
• Background materials/slides
Sources of case data

- Armchair cases
  Based on the writer’s own experience

- Desk research
  Based on company reports, newspaper or magazine articles, television programmes

- Field research
  Based on interviews and/or observations in the host organisation
Most common sources of Case data?

- Field research – 50.4%
- Generalised Experience – 4.8%
- Published Sources – 35.1%
- Unspecified – 9.7%

Source: What Drives Case Sales, 2009 © IMD International
Developing the case study

1. Data collection
   • need specific vs trawling

2. Data restructuring
   • deciding structures
   • writing and editing the case

3. Case enhancement
   a) supplementary material
   b) Teaching note

Adapted from J Heath (1998)
Case writing according to McNair (Harvard)

• Create interest and

“a willing suspension of disbelief”

• Case structure

  • Time structure
  • Narrative structure
  • Plot structure
  • Expository structure
Time structure

- chronology, historical sequence

• Make it clear when case events occurred.

• Avoid the present tense (unless in reported speech).

• Avoid words such as this year, currently, recently. Use actual dates instead.

Source: Heath (1998)
Narrative structure

- the flow of events in an unfolding story

The first task in writing a case is to tell a story, to present an interesting and readable account of the events and circumstances of the case situation.

Source: Heath (1998)
Telling stories

- Stories matter. They are where we lose ourselves in order to risk other possibilities, where we can escape and play, or confront and confess.
- We do not listen to stories; we join in.
- And in accompanying the players of that story we meet many sides of ourselves that we can take back to our lives when the playing is over.
- But good stories need to be told well if they are to envelop us. Flair, humour, truth and insight are all tools that must be well honoured.

Source: Stephen Clark, A very big gig, Sunday Telegraph, 17/11/96
Expository structure

- disclosing, unearthing and communication of information

• Provide opportunities for discovery.

• Decide how explicit you need to be for the target reader group.

• Do not over-estimate the reader’s knowledge.

• Do not under-estimate the reader’s intelligence.

Source: Heath (1998)
There is usually a central theme or issue - the main storyline or plot - together with a number of subplots that have some kind of impact on one another.

These typically concern the actions and motivations of the “actors” in the case situation.

Source: Heath (1998)
McNair’s 4 structures in Black Sheep Breweries?

- **Case structures**
- **Time structure**
  - Narrative structure
  - Plot structure
  - Expository structure

- the establishment of Black Sheep Breweries in 1992 (p.1)
- Business Expansion Scheme in 1992. (p1)
- offered shareholders tax-free benefits for a period of five years (p.1)
- promotional split for 1996, was as follows (p.2)
- taken over by Scottish and Newcastle in 1987 (p.3)
- profits over the last 5 years (p.4)
McNair’s 4 structures in Black Sheep Breweries?

- **Case structures**
  - Time structure
- **Narrative structure**
  - Plot structure
  - Expository structure

The story of the Black Sheep brewery is a true depiction of a 'country' brewery, in contrast with the macro-brewers or what Theakston termed "the Burton and London biggies." The brewing of all their beers used very traditional vessels and ingredients, and was fermented exclusively in Yorkshire slate squares. Only proven techniques that …… (p.1)
McNair’s 4 structures in Black Sheep Breweries?

- Case structures
  - Time structure
  - Narrative structure
- Plot structure
  - Expository structure

"The outlook we had when we begun, and the reality we have experienced regarding our profits over the last 5 years, have been greatly different. The greatest variance, has been regarding the 'bottom line' - it has not grown as fast as we initially anticipated, and this is all attributable to ever increasingly squeezed margins."

Pondering these thoughts for a few moments one began to wonder what were the real opportunities and threats that lay ahead for the company. A forthcoming meeting of the shareholders would be sure to provide the opportunity for some challenging questions and Theakston’s vision for the future would play a critical role in encouraging ongoing shareholder investment. (P.4)
McNair’s 4 structures in Black Sheep Breweries?

- **Case structures**
  - Time structure
  - Narrative structure
  - Plot structure

- **Expository structure**

  The brewery was set up by Paul Theakston as a Business Expansion Scheme in 1992. .... offered shareholders tax-free benefits for a period of five years, (p.1)

  “....always been able to sell as much as we have wanted to - our problem, has been matching capacity with demand.” (p.3)

  "We see ourselves as a single site brewery” (p4)

  “…our profits over the last 5 years, …the 'bottom line' - it has not grown as fast as we initially anticipated …attributable to ever increasingly squeezed margins.” (p.4)

  A forthcoming meeting of the shareholders (p.4)
Writing the case

Suggestions:
- keep the case writer out of the case
- opinions may be more important than facts
- check all verbs and adjectives for the impression they convey

Consider:
- choice of words
- sentence length
- use of quotations
- change of pace
- degree of repetition
- means of representing data
- Internal consistency
- emphasis

Adapted from: Heath (1998)
In the first paragraph you make a statement about the issue which must be decided in the company.

In the second paragraph you give a little background about the company and its place in the industry.

In the third paragraph you tell how the situation requiring action developed.

Then, as needed material is available, you give additional data about the way management handled earlier events leading up the the issue, and the data from which alternative courses of action might be visualised.

You carefully leave out of the case your own opinions and evaluation.
Assuming you are developing a case which incorporates both field and desk based data:

- Identifying the need for the case study
- Identifying appropriate opportunities
- Making first contact with the organisation
- Agreeing parameters for the case research
- Deciding the boundaries of the case study
Case researching & writing cont.

- Undertaking desk research
- Initial field research within organisation
- Writing up the first draft
- Compiling the support material
- Checking draft against original objectives
- Further field and desk research
- Formal release authorisation
Reflections on learning…

What was the most important thing you have learned from this PDW session?

What conclusions have you drawn about using the case method for teaching and writing?

What actions will you take as a result of these conclusions?