Case-Study Alliance TURKEY

Case Writing Coursebook

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Tao Yue

Scott Andrews, Kutay Güneştepe, Nazlı Wasti, Hilal Terzi, Deniz Tunçalp, B.A.S. Koene

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Introduction

Brief Introduction about Teaching Cases

A teaching case is a description of an actual (or fictionalized) business situation. It is often a problem, a challenge, or a dilemma that a decision-maker has to solve. It brings the challenges of real-life business situations into the classroom to engage students in stepping into the shoes of today's business professionals. In other words, case writing is like an art of explaining a highly technical subject in a non-technical way.

Some Statistics about Teaching Cases

Case studies are used in different fields of management education. Frequencies on subject category are shown Figure – 1.

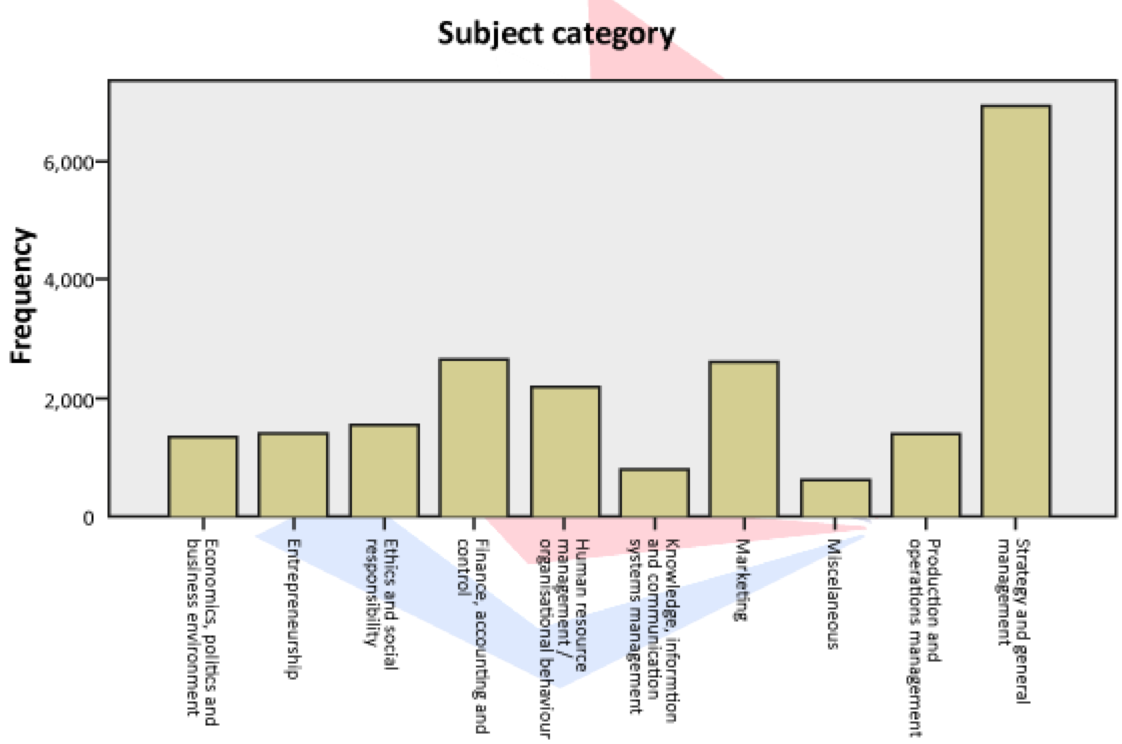

Figure – 1

Figure – 2 shows sources of cases according to continents. Most of the teaching cases are from organizations at North America, which is nearly twice as more than second the closest region.

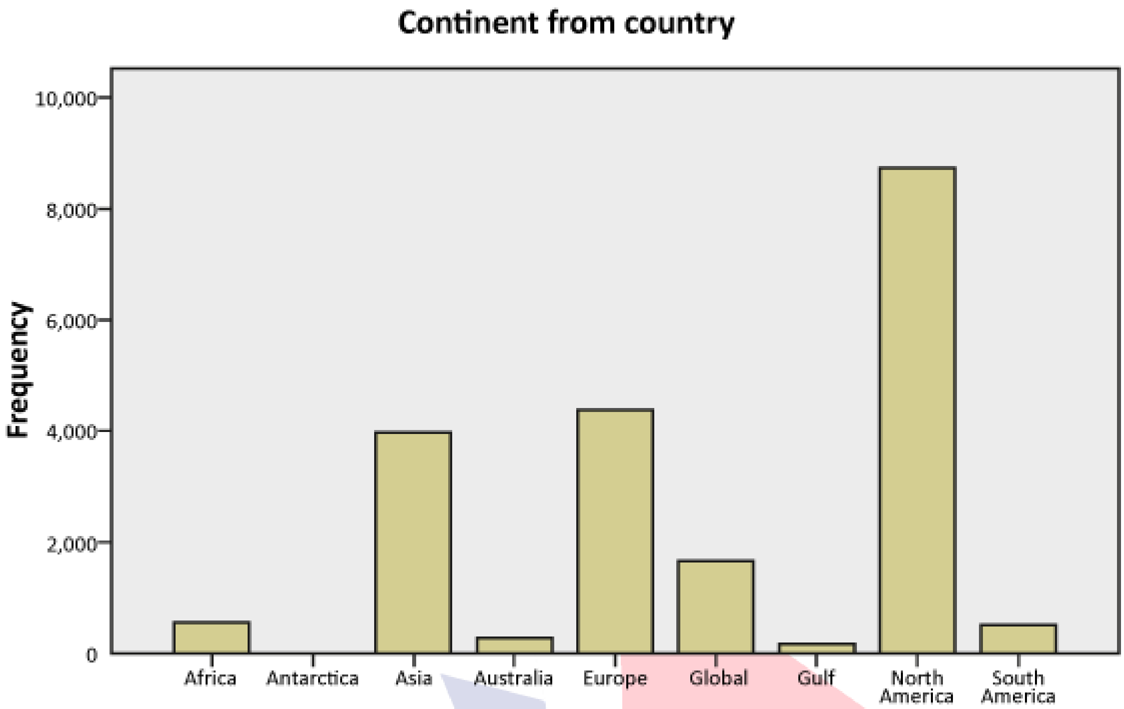

Figure – 2

Most of the organizations used in teaching cases are large organizations, as shown in Figure – 3.

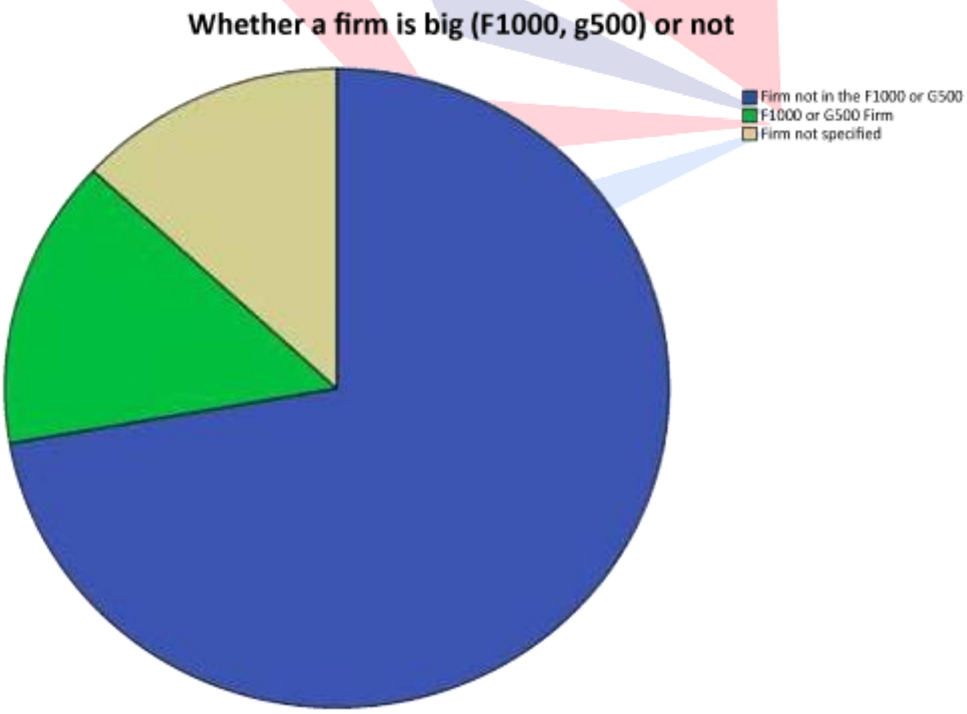

Figure – 3

Teaching case writers gather data on subject organizations from different sources. Figure – 4 shows the most common data sources about case writing.

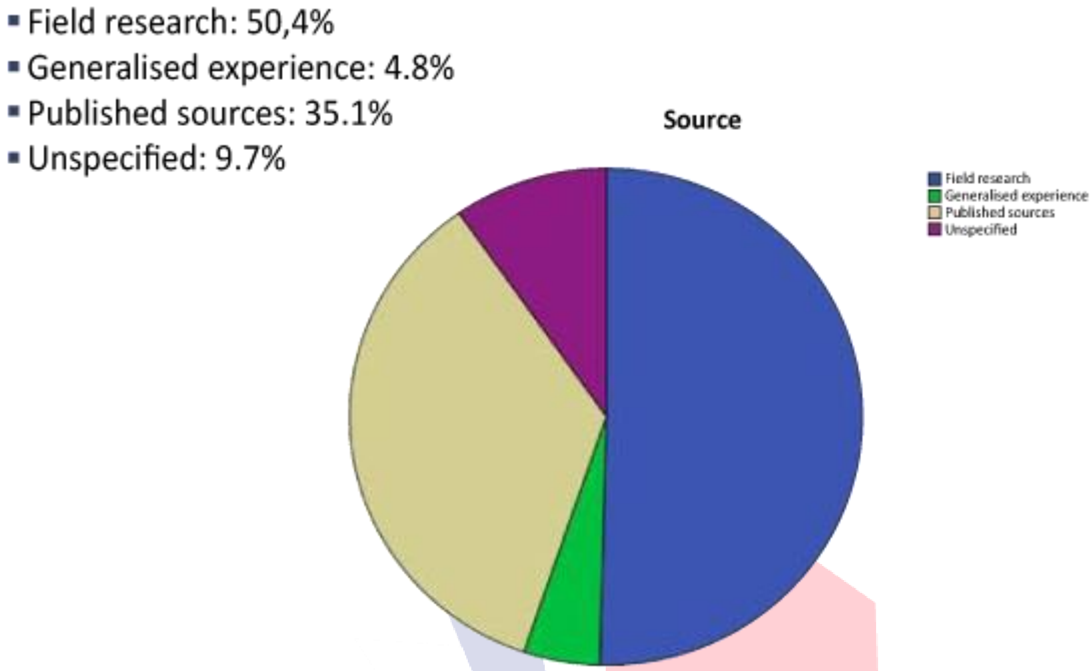

Figure – 4

Planning the Case

<u>How to Write a Good Teaching Case?</u>

A teaching case is a neatly packaged snapshot of an actual management situation. It presents a problem, an issue, a challenge, or an opportunity faced by an organization. The style of a teaching case is vivid, realistic, and convincing. It compels students to take the role of the decision maker in the organization, think as if they were him/her, and be analytical and creative.

You see that a teaching case is rather different from the case section of a research paper. A good teaching case has two components: a sharp focus and an interesting story. A teaching case works more like a thriller than a scientific paper. It evolves around "suspense" – a vital issue that has to be resolved or a crucial decision that has to be made, which is also called the "decision focus" or "action focus". This focus must be sharp so that students will be immediately drawn into the situation and know upfront what they are expected to do.

Apart from a sharp focus, a good teaching case should also have an engaging story. A case story is more than a business history: It has a setting, actors with their perspectives, and dramatic elements such as a dilemma or a conflict. The perspectives are presented in a balanced way: Comparisons and contrasts are used to show different points of view.

A good teaching case is easy to read but difficult to solve. The clues to resolving the case issue are in the text but hidden – it is up to students to use the tools and theories they have learned and the information provided in the case to analyze the situation and come up with solutions. A good teaching case often has many layers – when students dig deeper and deeper into the case, they may be surprised at aspects they did not notice before.

A good teaching case is short and sweet (it is much more difficult to write a shorter case than a longer case!) Students usually have difficulty absorbing more than 10 pages of content. A good case should be rich enough so students can break down the information for analysis, and clear enough that students can put the information together again to form a coherent solution. An effective case does not have to be 30 pages; a three-page case can also work wonderfully!

Which cases are popular worldwide?

- Cases with a simple and clear focus
- A hot topic with broad relevance
- Shorter cases (10 pages or fewer)
- Cases about emerging economies

- Cases besides teaching notes that also have concrete assignment questions or exercises
- Role plays and exercises (instructions have to be very clear)

<u>Creating the Framework of Your Teaching Case</u>

Before you begin writing a teaching case, it is advisable to ask yourself 10 sets of questions that can better prepare you for the writing.

1. **How does the case fit into my teaching? What are my teaching objectives? What key discussion questions do I want to bring into the classroom?**

The teaching note comes before the case. When you set out to write a case, you must have a clear idea what purposes the case serves in your teaching and how you want to use it. Make a list of the teaching objectives you want to achieve with the case. Then make another list of several key discussion questions with analytical tools that can help answer these questions. If you want to link the case to theories, make yet another list of the theories and relevant readings. After you have done these, you already have the skeleton of a teaching note. While drafting the case, you may be overwhelmed by raw data – a preliminary teaching note can help you decide what to include and not include in the case. A case writer usually drafts the case in parallel to the teaching note. You need to compare them from time to time to ensure your teaching objectives and discussion questions are covered by the case and that the case does not contain too much irrelevant information compared to your teaching plan.

2. **Who will my audience be? How difficult should my case be?**

Are your students undergraduate or graduate? Are they MBAs or executives? Depending on the level of your students and the type of study they are following, you should adjust the approach to the case as well as the difficulty of the case.

A practical case usually goes down well with MBA or executive students, and bachelor-master-Ph.D. trajectory students may find it easier to accept a case with more theoretical emphasis. Undergraduate students may be less familiar with business life than graduate students, so the case writer should include more background information in the case or suggest prior readings.

There are three levels of case difficulty. You have to decide which level your case should be before setting out to write it.

- Level 1 (simple): state the protagonist’s solution to a problem and ask students to analyze whether it is effective.
- Level 2 (medium): present the problem facing the decision maker and have students come up with solutions.

- Level 3 (difficult): describe the situation that the decision maker is in and have students figure out where the problem lies and provide solutions.

3. **How fresh is my case topic? Do similar cases already exist? Have I done an Internet search (e.g. on www.thecasecentre.org)?**

What makes a case "fresh" is not necessarily how current the information is, but how unique the case focus is. Although cases about the latest happenings are preferred, a relatively older story can also be "fresh" if no one has written about it. Multinationals, high profile start-ups, and recent media hot topics often catch a lot of attention from case writers. Before you decide to write a case, it is advisable to search on websites such as www.thecasecentre.org or hbsp.harvard.edu to see if similar cases are already written by others.

4. **What type of case do I want to write? A field case, a "library" case, or an "armchair" case? A full-length case, a mini-case, a case series, or a multimedia case?**

A case can be written based on field research, published sources (a "library" case), or generalized experiences (an "armchair" case). A field case is preferred over a "library" or an "armchair" case because field research can give insight into an organization that a "library" or "armchair" case can rarely achieve. Some case writing competitions also state that they accept only field cases.

A "library" case is developed with published information from annual reports, newspapers, research articles, internet, etc. It is an easy, efficient, and "safe" way to develop a case. Because you do not need interviews with an organization, you can collect data relatively fast and from wherever you are. And because you do not need to get permission from the organization to release the case, you are also sure once the case is written it can be publicized.

An "armchair" case is based on generalized experiences. This is not the main stream of teaching cases. Most "armchair" cases are written to provide the introduction to a course, and often with a fictional story and characters. For instance, an MBA program teacher wants to introduce the topic of cross-cultural leadership and invents a case about an American manager leading a team of six people from different cultures and experiencing frustrations.

A full-length case is usually 8 to 30 pages long and single-spaced, excluding exhibits and appendices. However, the current trend is to have shorter cases. The Case Centre records show that cases between 8 and 10 pages sell best. Some case competitions make it explicit they do not accept cases of more than 5,000 words. The demand for mini-cases (2-5 pages) is on the rise; mini-case series are equally popular. If you have the resources, a mini-case, accompanied by a video clip, works amazingly well. Cases with visuals are always stronger than those with only words, which is why figures, tables, pictures, and videos are useful.

5. **What is the decision focus of my case? Who will be my protagonist? Why is his or her decision urgent?**

The decision focus is the focal point of a case: The case story evolves around it. Without a clear decision focus, a case will not work. To determine whether a decision focus is clear, you can ask yourself the following questions:

- Does it serve my teaching objectives?
- Is it specific enough? A decision focus should be situation-specific and concrete; it cannot be vague or abstract.
- Is it general enough? A decision focus should also support a deeper and broader discussion and can serve as a general lesson on how to approach similar type of issues .
- Is it urgent enough? A decision focus should be of immediate importance. The decision maker should have a "deadline" to resolve the issue.
- Is it the only one? Real-life business situations are complex: You may be tempted to include various issues in one case to remain true to facts and show students the intricacy of actual business. But remember: do not try to kill many issues with one case. You must focus on one issue only and the decision behind it. During classroom discussion, this focal issue will lead to many sub-issues. If you can explore the focal issue thoroughly, you already will have covered a wide range of questions and the complex decision-making processes behind them.

The decision maker in a case is the protagonist. Not all cases have a protagonist (some cases have only the organization), but a protagonist can force students to examine the situation from a particular person's perspective, thus creating an identification with the organization and the urgency for problem solving. A protagonist can be an executive, a line manager, an entrepreneur, or an employee, depending on your case subject. It is not, however, advisable to make the protagonist an external consultant. After all, a consultant still looks at the situation from an outsider's point of view – it makes a huge difference whether one makes their own decision or gives advices to others. The focal decision must have a sense of urgency. A decision like, "What should Zoo A's funding strategy be?" is not as urgent as "Facing 50% government sponsorship reduction that takes effect as of 2017, how should Zoo A adjust its funding strategy to guarantee operations?"

Note: Although we encourage you to write decision-focused cases, a case is not always decision focused. It can also demonstrate best practice, illustrate improper handling of a business situation, or compare different organizations with similar practices or backgrounds.

6. **Does the case include controversy, contrast, conflict, dilemma, or other dramatic elements?**

Dramatic elements like a controversial or polemic topic, disagreement between stakeholders, conflict of interest or personality clash between decision makers, are important for a teaching case. Often, even before a case is written you can already tell whether it will work. A good case gives a "Wow!" feel – you know in advance it will generate heated debate and lead to multiple levels of analysis. Case writing competitions often make "controversy" or "drama" one of the judging criteria – many prize-winning and best-selling cases are not only educational but also contain entertaining tension.

7. **What are the standard components of a case? How shall I open the case? What sections shall I create thereafter? How shall I close the case?**

The standard components of a case are straightforward:

- Opening
- Industry and organization background
- Case story
- Closing

The opening section is the most important part of a case. It usually consists of one to three paragraphs, serving as the stage setting and a "hook" at the same time. In this section When and Where Who does What, Why, and hoW (the six Ws) are introduced. You should tell who your protagonist is (name and position), what kind of decision he or she has to make, when and where this is happening (date and place), and why and how this would happen. It is customary to finish the opening with one or two key questions facing the protagonist. A good opening is brief, direct, and has a dramatic effect that can serve as a "hook" to motivate the reader to keep on reading. Do remember to avoid clichés, such as "Mr. Y leaned back in his chair pondering the challenges his company was facing."

The sections that follow serve as the framework of the case. It usually has a funnel structure, moving from more general to more specific information. The section headings are not the same as the case components. For example, in the "background" and "case story" part, you can have sections entitled, "The Chemicals Industry," "Dow and Its Acquisition Program," "Dow's Acquisition of Wolff Walsrode," and "The Integration of Wolff Walsrode." The sections headings should be short, descriptive, and straightforward to help students follow the story and locate data. Under each main heading, you can have one or several subheadings. But there should not be more than one layer of subheadings, as too many subheadings will make the case structure fragmented.

The closing section gives a short summary of the case to reiterate the decision focus and often introduces a broader new question(s). The question(s) raised in the opening paragraph is immediate, and the question(s) asked at the end is deeper and more general. Although phrased differently from the opening paragraph, the closing paragraph should nevertheless come back to the protagonist's perspective.

8. What data do I need to complete a case? Do I need interviews, and if so, with whom, and how many? How can I get an organization to cooperate on allowing interviews?

Industry and organization background may seem the easiest part in a case to write but is actually tricky. The common pitfall for new case writers is to include too much information in this part. A teaching case is not the entire history of an organization. The background part should include only the most relevant information for the protagonist to make a decision. Needless information will only muddle the case presentation and bore the student. Figures, tables, and exhibits are always useful to economize the text and give a direct impression of the facts.

The background information mostly can be gathered from published sources either online or offline. But to write an effective case it is helpful to obtain "insider information." Therefore interviewing the organization is rather necessary, even when you think you already know the organization well.

When you propose interviews to an organization, they would certainly want to know what is in it for them to cooperate. An organization can expect three kinds of benefits, depending on the nature of the case:

- Enhance the brand name – a case, if widely used by educational institutions and businesses, can be a highly effective medium to showcase an organization's best practice, expertise, or innovation.
- Improve organizational learning – an organization can use a case as internal training material to reflect on its effective or ineffective practices and decisions.
- Aid managerial decision making – a case can provide a 360-degree helicopter view of a complex issue, which helps management to make difficult decisions.

The organization would also want to know how you are going to use the outcome of the interviews. It is fair for them to expect that the exclusive information they provide you will not be used against their interest. You can propose signing a confidentiality or non-disclosure agreement between the two organizations to guarantee good conduct on your part. Most large corporations have such a standard document, but if your counterpart does not have one, be sure to establish a written agreement with them, even if it is only an email.

At the initial meeting with the organization, you should present a case plan that includes your teaching objectives, an outline of the case, what information you wish to obtain from the organization, and how you will use the outcome of the interview. The meeting is usually between the organizational head who authorizes the interviews, the model for the protagonist, and the case writer. The purpose is to define the decision focus (often the case writer's understanding of a situation is not completely true to reality), establish an agreement for cooperation (interviews, feedback to case draft, and case release), and set an action plan. It is also useful at the first meeting to inquire about any internal documents you may use for case writing.

After the initial meeting, it is always helpful to have a contact person at the organization who can oversee the coordination of interviews. Since case development is seldom the priority of an organization, setting up interviews by yourself may be complicated and time consuming. You may suggest several people you would like to interview, but it is best to leave it to the organization to decide to whom you should talk – they know their own people much better.

You need at least two interviews with one person: the first (30-60 minutes) to get a good understanding of the case issue, and the second (30-45 minutes) to clarify vague points and ask in-depth questions following the previous interview. For the first interview, you should list out the questions you would like to ask. But it is not necessary to strictly follow this list, as answers often lead to more and deeper questions: Often you do not get satisfactory answers where you hoped but get interesting or even inspiring answers where you did not expect. As an interviewer, you must learn to improvise. But be sure to keep time: Some interviewees are less structured than others; when they drift away, do not be shy to pull them back. Try to raise concrete questions and ask for examples – during the first interview in particular, the interviewee tends to give "correct" official lines.

It is advisable to tape record every interview so you can concentrate on listening during the interview and ask intelligent questions. Do not wait for too long to transcribe the recording – you can easily lose the fresh impression within a few days. Quotations are a powerful tool in case writing. Judgments, evaluations, or emotions that are awkward for a case writer to state can be put in the mouth of an actor. However, when a quotation is not strong or expressive enough, it is better to rephrase the content in your own words. Quotations should not be long, usually no more than three sentences. It is less important whether a quote captures the exact words of an interviewee. It is more important that a quote correctly expresses their meaning. Before the case is released, you should run the quotes by the interviewees to get approval.

You should also get the organizational head to sign a case release document. In most cases, once an initial agreement is established, the organization will not object to the case being released. But you should not exclude the possibility that after they have read the case they decide to withdraw their permission to publicize the case. This is usually because the case is too good rather than too bad – it may contain some sensitive or poignant information that makes the organization uneasy. In this situation, you can propose to disguise the identifying information (organization's name, interviewees' names, financial data, and sometimes even the product, the industry, and competitors) to make the organization anonymous or at least have deniability if speculations arise about the organization's identity. Nevertheless, an undisguised case is always preferable, as it comes out more credible and powerful than a disguised case.

9. Within what time frame do I want to finish the case? What if I experience a writing block?

Writing a case can take as short as a few days and as long as a few months. The most time-consuming part of case development is interviewing. Depending on how cooperative and efficient the organization being interviewed is, you need to prepare one to three months for all the interviews. Transcribing interview recordings and selecting useful data from the transcript also take time. A large portion of the data gathered from the interviews will not be used. To save time, it is always helpful if you already have clear and concrete ideas what to write. When you go through the transcripts, you will see right away the quotes you want; sometimes you will even see the right sentence to open your case!

Try to compose the first draft as soon as possible after the interviews. As time goes on, the real story easily fades away. Writing up the draft will take a few days if you do not encounter a block during writing. A writing block has several possible causes:

- Lacking a sharp decision focus;
- Lacking a clear case structure;
- Lacking concrete details from which to build a story;
- Overwhelmed with details and not knowing what to choose;
- Lacking understanding of your students and their level.

The advice here is: Think hard before you write. You can only write clearly if you think clearly.

10. In what style shall I write a case? Are there any writing rules I should know? Any tips for editing the draft?

First and foremost, a case must be written with an objective voice. You – the case writer – should take a neutral stance and make no biased statements. If you have to make any judgments or evaluations, put them in the mouth of your actors. Watch out when you write a “best practice” case: Be sure not to compliment the organization effusively. You should remain objective and let readers draw their own conclusion.

Secondly, a case should include neither analysis nor lessons learned which can go into the accompanying teaching note. Remember, you want to present your students with an intriguing case to solve, so too obvious direction or hints will defeat your purpose.

The language of a case should be clear, direct, and concise. Think of newspaper language, not academic paper language. Your readers are most likely students or non-academic professionals, so try to avoid using jargon and technical terms. A case is limited in length and you cannot be wordy or indirect. Try to limit the information in the case to “just enough” – not too much to be overly detailed and not too little to be skimpy – and organize this information in a tight way. For clarity sake, also try to cover only one point with one paragraph. A good method to test whether your writing works is to read the case aloud to a family member. If he or she can follow it, then you can safely use it on your audience.

Last, a case may include “distorted” information. To keep a case in focus and within your desired length parameters, simplifications, enhancements, and downplay of some information are commonly used. The ultimate goal of “distortion” is to maximize the teaching value of the case.

There are several conventions in case writing:

- Always write a case in the past tense. The reason to use the past tense is that situations are always changing and a true statement now may be false in a few months. Many new case writers find it awkward to use the past tense, but the technique ensures that the case will remain relatively timeless. The trick is to set a time frame for the case from the very beginning. For example, when you talk about “Company A is the industry leader,” you can rephrase it as “at the end of 2015, Company A was the industry leader.” Also try to avoid words like “currently” and “presently.” Instead, use concrete time frames like “in May 2015.”

- Use single space.

- Refer to actors by their last names. The first time you introduce an actor, specify his or her full name, and from then on, use only the last name.

- Do not capitalize position titles.

- Number exhibits and refer to them in the text.

When you have drafted both the case and teaching note, it is time to edit the case. Work backward from the teaching objectives and discussion questions and check whether the case includes adequate information to address them. Is the information sufficient to support a lively discussion with possible variations of solutions? If yes, is it clear enough with no needless details muddying the presentation? Are there any colourful quotes you can use to enhance the case? Is the case easy to read? Are the grammar and spelling correct? Are the exhibits numbered and references sited correctly?

Case Writing – Deciding on Viewpoint

For every story there is a storyteller, so the case writer must decide who is to tell the story. The choice of viewpoint will determine how much you can let your reader know. Hence it is a key issue in relation to the expository structure of the case. Writers are faced with a choice between two major points of view- omniscient (all-knowing) or character (actor).

Omniscient Viewpoint

This permits you, the author, to see, know and explore everything that serves the storyline. Thus it provides the greatest freedom for the writer. You tell the story from outside, commenting on anything you choose. You may do it impersonally as the all-knowing god-like author, without crediting the comment to any particular character within the story.

Although the omniscient viewpoint provides great freedom for the writer, it has several shortcomings. It can make it more difficult to involve the reader directly in the case issues. If the author's voice intrudes too obviously it is harder for the reader to forget that this is just another case. There is also the risk that the author's assessment of the situation will emerge and pre-empt the reader's own evaluation of the case.

Character Viewpoint

Character viewpoint lets you tell the story through the eyes of one or more characters (actors) within the story (case), knowing and revealing only what the character knows and feels. Included within this category are first-person and third-person (major character) viewpoints, narrator-observer (minor character) viewpoint and multiple viewpoints.

- **First-person and third-person viewpoint** has the advantage of telling the story (case) from one point of view. However 'I', 'he' or 'she' can only relate what he or she knows or feels.
- **Narrator-observer viewpoint** is that of a minor character within the story, whose position, or special knowledge, makes this person a convincing observer. It may also be someone to whom the reader can relate more readily than the other characters in the story. Dr Watson, the narrator-observer of the Sherlock Holmes stories, is a prime example of the use of this viewpoint.
- **Multiple viewpoints** involve telling the story from the point of view of several characters in turn.

Which Viewpoint to Choose?

For the case writer, the teaching and learning objectives for which the case is being written will influence the choice of viewpoint.

An **omniscient viewpoint** may be appropriate where the case writer is attempting to replicate the viewpoint of an external analyst, or consultant. He or she may have collected data on a case situation from a number of sources and is now to produce a report, perhaps for senior management or some outside authority.

If we wish to put the reader into the position of a decision maker within the case situation it may be appropriate to adopt a **first person or third person viewpoint**. Only those events that this person experienced, know about and had views upon are reported. The reader is presented only with the data available to the decision maker and nothing more. Thus, the case decision maker's situation is reproduced. In the same circumstances, and armed with the same data, what would the student do in the case situation?

The **narrator-observer (minor character) viewpoint** may be helpful in providing a person within the case to whom a young student can more readily relate than to senior managers. For example, a trainee, or graduate on a work placement, may be in a good position from which to observe the actions of different people in a work situation in which he or she is not directly involved. From such a vantage point the 'facts' and 'opinions' of the situation may be reported in a detached and relatively neutral manner.

Multiple viewpoints can be useful in many case situations. For example, various members of his/her staff may present a manager with different perspectives and opinions on a situation. From these the manager will have to form his/her own understanding of the situation and decide the action it requires.

Examples

The short case incident below is narrated from three different viewpoints.

1. **An awkward incident (omniscient viewpoint)**

Mary O'Hara, a training school supervisor, was approached one morning by one her trainees who were obviously very agitated about something. Pointing to a man leaving the office, the trainee said that she had just seen him searching through the pockets of her coat. The coat was hanging on a rack near the door with several others.

Mary recognized the man leaving the office as the company's maintenance electrician.

She asked the trainee if there was anything missing from her pockets. The trainee said she didn't think so.

Mary O'Hara was uncertain what she should do now.

2. **An awkward incident (first-person viewpoint)**

"One morning, soon after I became a supervisor at the training school, one of my trainees came up to my desk in a very agitated state. She said that she had just seen a man searching through the pockets of her coat. The coat was hanging on a rack near the door with several others.

I looked up and saw a man leaving the office. It was the company's maintenance electrician.

I asked her if there was anything missing from her pockets. The trainee said she didn't think so.

I wasn't sure what to do next."

3. An awkward incident (narrator-observer viewpoint)

"The incident occurred when I was a trainee. Our supervisor, Mary O'Hara had a desk near mine. One morning one of the other trainees went up to Mary's desk in a very agitated state. She told Mary that she had just seen a man searching through the pockets of her coat. The coat was hanging on a rack near the door with several others.

I looked around and saw a man leaving the office. It was the company's maintenance electrician.

Mary asked the girl whether there was anything missing from her pockets. She said she didn't think so.

It seemed to me that Mary didn't know what to do next."

Data collection for your case

Getting in Touch with the Company

Here are essential steps you should consider before contacting the company.

- Share your case plan with the company
- Specify the type/amount of information you require
- Make the boundaries of your research activity clear
- Present an example of a similar case
- Ask if a non-disclosure agreement (NDA) needs to be signed
- Identify the people in the company you need to interview
- Make clear how much time/commitment is involved
- Explain publication process/distribution of the case
- Invite the future protagonist or company management to your case teaching session to give a guest talk or be a judge to evaluate the students' solutions
- Give assurance that the case will not be released until authorized
- Check who needs to authorize the case
- Confirm willingness to edit in response to company feedback
- Make clear the timescales involved
- Make sure whether the company, interviewees, and industry need to be disguised
- Ask to the company to agree on a provisional case release

Interview Techniques

1. Before you start

- Do your homework thoroughly
- Develop an interview guide (a general outline, e.g. simple chronological flow or key questions)
- Take control of the location (most likely, your interview will be at the company premises)
- Dress appropriately or at least dress with a purpose

- Be on time
- Ask permission in advance for recording

2. **Interviewing Principles – Information-gathering, Personal Profiles, News**

- There's no such thing as a stupid question.... provided you've done your homework
- Making the interviewee feel comfortable – connection is key
- Active listening and summarising are powerful interviewing tools
- Interviewing is not about you! Minimise your own vocals, allow for pauses
- The interview gems often emerge as you're walking to the door; the interview only ends when you're out the door

3. **Managing the interview**

- Open by introducing yourself, stating the role and purpose of the case
- Realign with interviewee on time allocated for interview
- Request permission for recording; explain it's for your ears only
- Formulate your questions clearly
- Ask open-ended questions (who, what, why, when, where, how, describe, can you explain…) when you want to explore the subject
- Ask closed-ended questions (yes/no answers) when you want to clarify a fact
- Be an active listener: maintain eye contact, watch body language, hear tone being used
- Summarize information to maintain focus and acknowledge interviewee's input
- Don't ask a laundry list of questions: be ready to improvise!
- Keep opinions and/or leading questions to a minimum: use them when you have a relationship with the interviewee to trigger 'passionate' insights
- Show empathy but stay neutral
- Watch the time and check you've asked crucial questions before closing

4. **Common pitfalls**

- Not acknowledging that you don't understand a particular point

- Not taking enough time to connect with the interviewee
- Sticking too much to your own agenda/list of questions
- Asking a series of questions in a row
- Asking double-barrelled questions, where one question deals with more than more issue, e.g. "How satisfied are you with your pay and job conditions?"
- Forgetting to watch the time

5. Completing the interview

- Be patient: don't count on too much useful information during the first interview
- End the interview by stating the next step
- Set up a second interview to follow up interesting aspects covered in first interview
- Listen out for gems as you walk to the door
- Transcribe the recording and/or write down notes as soon as possible

Writing Teaching Notes for Your Case

A teaching note is a document that accompanies a teaching case to help potential instructors gain insight into the case and achieve better usage of the case. Although it is not a rule for every case to have a teaching note, cases with a teaching note are proven more popular than those without. The Case Centre (www.thecasecentre.org) statistics show that while only 40% of the cases in its collection have a teaching note, 95% of the 50 best-selling cases have one. Almost all case writing competitions require both a case and an accompanying teaching note; the quality of the teaching note usually counts for 40% of the overall grade. It is fair to say that a case without a teaching note is incomplete, and thus, unlikely to reach its utmost value as an educational tool.

Creating the Framework of Your Teaching Notes

Writers should consider following topics before writing their teaching notes.

1. **Who is my audience?**

When writing a teaching note, it is crucial to remember that you do not write this for yourself but for many faculty members you do not know in order to help them better understand and utilize your case. Not all of these "strangers" have the knowledge of your case topic or the organization you described so you have to guide them step by step through the case, show them all the important details, explain, analyze, and synthesize the information, and demonstrate how to use the information in class discussion to maximize the learning values of the case. Some details you think should be obvious in their analytical values still need to be highlighted and spelled out. The goal is to make it possible for fellow instructors to adopt your case without any additional research. You do not want them to email or call you repeatedly to ask questions about the case either!

2. **Length**

Teaching notes may vary in length: some are 20 pages and others are only two pages. While a good teaching case is short and concise, a good teaching note is detailed and comprehensive. It is very difficult to cover all the points in a two-hour class with a teaching note shorter than five pages.

3. **Components**

A teaching note has many formats – there is no single case standard, but some components are necessary to structure a good teaching note:

- Synopsis (a brief summary of the case and its conceptual context)
- Teaching objectives (3-5 specific objectives you want to achieve with the case)
- Target audience (the study and the level of students the case is suitable for)

- Case analyses and teaching plan (explained further in the next section)
- References or recommended readings

In addition to these necessary components, a good teaching note often includes the following as well:

- Teaching approach (whether the case can be used for written exams, role-plays, or combined with a video, etc.)
- Data collection (where the data are from and whether they are disguised)
- Assignment questions (for students to prepare before the class)
- Alternative analyses (e.g., a M&A case can be analyzed from strategic, organizational, financial, marketing and branding perspectives, to name a few)
- Feedback (how the case worked with different student groups)
- Epilogue (actual outcome of the case situation)
- Broader lessons (general lessons drawn from the case)

4. Teaching Objectives

Teaching objectives provide an overview of how the case fit within a course or the general discipline of a field and give teachers a guidance of how to use the case.

There are knowledge, skill, and attitudinal teaching objectives. Knowledge objectives refer to analytical tools, framework, or theories of a field. Skill objectives relate to the application of knowledge. Attitudinal objectives mean students will develop an attitude about their "managerial" or social responsibility after using the case.

Teaching objectives need not be too many, preferably 3-5 for a full-length case and 1-2 for a mini-case. They should be general enough so that they are important and relevant for the course you are teaching. At the same time they should also be as specific as possible and measurable so that you can judge if your students have reached these learning goals after the course.

Using precise verbs to formulate your teaching objectives can help make them specific and measurable. For instance, if your objective is for students to understand a concept (knowledge objective), you can formulate the objective as "After discussing the case, students will be able to explain … [certain issue]." If your objective is for students to analyze a situation with a new tool (skill objective), you can formulate the objective as "After discussing the case, students will be able to demonstrate … [the way to solve a problem]." If your objective is for students to appreciate certain decision (attitudinal objective), you can then say "After discussing the case, students will be able to defend … [certain action] with arguments." Below are more examples:

Objective	**Action verbs**
Remembering	Define, duplicate, list, recall, repeat, reproduce, state
Understanding	Classify, describe, explain, identify, locate, select, translate, paraphrase
Applying	Choose, demonstrate, employ, illustrate, operate, sketch, solve, write
Analyzing	Compare, contrast, criticize, differentiate, examine, experiment, question
Evaluating	Appraise, argue, defend, judge, evaluate
Creating	Assemble, construct, design, develop, formulate, write

Table – 1

5. Case analyses and teaching plan

This is the most important part in a teaching note. A common way to organize the teaching plan is to draw a detailed roadmap of discussion questions and ask students to answer these questions by performing in-depth analysis – this analysis can be seen as the "answers" to the questions.

There are four categories of questions:

- Questions to prepare students for the discussion (can be also listed as a separate section, Assignment Questions)
- Questions to open the discussion
- Questions to advance the discussion
- Questions to close the discussion

Asking the right questions is a science as well as art. There should be a combination of open-ended and closed questions – use open-ended questions to stimulate discussion and closed questions to check whether students get the facts right. There should also be controversial questions to bring the discussion to a higher level.

Under each question is the corresponding analysis. In the analysis, you can suggest the application of relevant theories, models, and other analytical tools. Please remember always to refer back to the case, using the facts and numbers in the case to support your analysis. If you have included any financial data in the case, you should also explain it and its significance. The analysis should demonstrate at least one possible approach to answering the question. In most situations there is more than one approach: You need to show the alternatives and indicate their advantages and disadvantages.

It is always advisable to create a timetable for the teaching plan: How much time is needed for each discussion question and how much is needed for the opening, closing, and transitions. If you notice any typical mistakes that students make in analysis during test runs of the case, you should also note them in the teaching plan and suggest how to guide the discussion when such mistakes occur.

6. Writing style

Unlike a teaching case that is written in the past tense, a teaching note is **always written in the present tense**. Apart from this, the writing style for a case can also be applied to a teaching note – clear, direct, and objective.

7. Commons pitfalls

To summarize, the common pitfalls to writing a good teaching note include:

- A skimpy teaching note
- Too general teaching objectives
- Too many or too few teaching objectives
- Case analysis does not match case content
- Discussing a theory without a purpose
- Case analysis is a copy-and-paste from the case
- Not enough open questions
- Not enough closed questions
- Not enough controversial questions;
- No sample analysis or sample answers provided; and
- No analytical tools provided.

Writing a good case takes time, and a good teaching note takes even more time. To perfect a teaching note, you need to teach the case a few times, observe class dynamics, gather student feedback, and revise the teaching note accordingly. Only submit a teaching note for release after it is taught, debugged, and refined.

Conclusion

Case writing is a learning process for the case writer. Even if you are already an expert in your area of research, you may still encounter something new during the course of developing a case. After writing a case, you always learn something new on the topic. It is fun to write a case but not easy, especially for those who are used to writing research cases. A research case and a teaching case differ in many ways:

- A research case describes an organization or its decision-making process; a teaching case tells a story with a decision focus.
- A research case explains or analyses organizational decisions; a teaching case offers no obvious explanation or analysis.
- A research case is typically written at the early stage of a research project; a teaching case is typically written after a research project. In fact, many teaching cases are turned from research cases.
- A research case is faithful to “truth” or “the fact”; a teaching case may contain selected, simplified, distorted, or disguised information.
- A research case is mostly written chronologically with little personal touch; a teaching case can be written with flashbacks and should have actors, perspectives, and drama.

To write a good teaching case, you should look out for the following common pitfalls:

- The case has no clear decision focus
- The case has many decision foci
- The case has no clear structure
- The case is not objective
- The case offers a diagnosis of the problem or issue
- The case provides little context
- The case provides too many details
- The case has no actors
- The case has no dramatic interest
- The case is too dramatic with complex sub-plots
- The case is technical or theoretical (jargons and technical terms).

A good teaching case still needs to be updated in two or three years – the usual life cycle of a case. You can update the financial data and background information or add an epilogue if the decision focus remains unchanged. If you wish to introduce a new decision focus, you can write up part two of the case as a sequel to the previous one.

A case is an effective medium to establish you as an expert not only in your research area but also in real-life management practice. Well-known international case clearinghouses that can help you disseminate your case include the Case Centre (www.thecasecentre.org), Ivey Publishing (www.iveycases.com), and Asia Case Research Centre (www.acrc.org.hk), among others.

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