Chapter 6
Writing the Case Study

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ABSTRACT

The chapter covers the rudiments of writing a case study and the teaching notes or instructor's manual. While the chapter focuses on business cases for publication in top-tiered journals, examples of how these standards may be relaxed for lower-tiered journals, conference papers, and other peer-evaluated research outlets is also given. The author is currently associate editor of one case journal and editor of another and has taught case writing around the globe. While rooted in the methods of the North American Case Research Association this article incorporates ideas from the Harvard, Ivey, and other case study publishers.

INTRODUCTION

Basically, a case study is a story that illustrates a point, explains a concept, or is used to apply theories. All faculty use some case studies types in their classrooms. The typical textbook has many variations called case studies. Instructors also use their own or others. Case studies are ubiquitous in most teaching.

Many times, instructors become interested in writing cases, for their own classroom use or to publish. First attempts are challenging, as case writing is not as simple as it looks. Particularly for publishing, the rules and customs are not always intuitive. This chapter can assist the beginning case writer know where to start and how to avoid some of the major pitfalls. More practiced case researchers can improve case writing skills and be able to aim for highest levels of publication. This chapter focuses primarily on the business cases, although much is the same in other fields.

BACKGROUND

There is much academic literature in case pedagogy. Cases are an immersive teaching method, a method where students must involve themselves which, in turn, enhances their learning experience (c.f., Prawat, 1991). Cases are adaptable for students with different learning preferences: convergers, divergers, assimilators, and accommodators (Kolb 1995). To be beneficial, knowledge must be able to be used in a real problem or situation (Marzano, et al, 1988); case studies do that. Bloom's taxonomies (1971) defines progressively stronger levels of learning; while cases are useful for lower levels learning, they are particularly useful in analysis, synthesis and evaluation.

The "hands on," applied nature of how to write a case, however, is based more on custom and practice than upon traditional academic research. Still, it integrates application of good pedagogical research, as well as good research theory and techniques and even a dash of creative writing concepts (characterizations, suspense, etc.). Much of what is in this chapter is based on the giants in the field (see Additional Reading section at the end of the chapter) who have extensive backgrounds in writing and publishing cases and teaching others to do so.

What constitutes a well written case study can vary by academic field. Schram (1971), writing in the social sciences, states that a case examines a set of decisions, how they came about, were implemented, and ultimately what the results were. In business case research, this is considered a "descriptive case". Most business case journals accept few, if any, descriptive cases, therefore, the chapter will concentrate on business cases.

What is a case study? To some extent, what makes a case study – like beauty – is in the eye of the beholder. In a standard business textbook, one will often find several objects called cases. There is a chapter opening case, usually less that a page with a few questions to introduce the material to be covered. There are end-of-chapter cases running several pages, which help the students apply the materials they have just learned. The end of the textbook may have longer case studies that are more complex and require using tools from several chapters. Within the chapter, authors may include short one- or two-paragraph, boxed, case study exhibits illustrating examples without any intent for discussion or decision-making. While there are places for all cases types, this chapter is written for the reader who wishes to present them at academic conferences or publish them in peer-reviewed journals or other peer-reviewed outlets. In this case, the "beholder" who determines the "beauty" of a case study is the editor and reviewers who have the power to accept and publish the case.

Any listing or ranking of case research journals and case outlets is subject to opinion and to continuous updates. *The Case Research Journal* (*CRJ*) is the only case journal to make the Academy of Management's list of the top ten pedagogical

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