

Writing Case Studies

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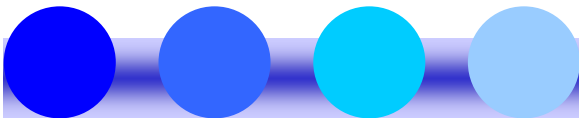
Dublin Institute of Technology

(www.dit.ie)



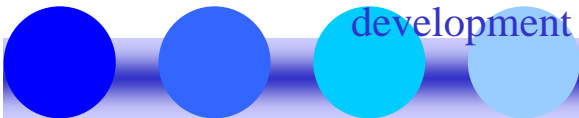
Who Am I?

- Director of the Institute for Minority Entrepreneurship (DIT),
- Research Fellow at the Dublin Institute of Technology,
- Adjunct Professor at the Small Business Institute, Turku School of Economics, Finland
- Head of 'Grow Your Business' Consultancy
- President-Elect of the European Council for Small Business,
- Member of the European Commission Expert Group on Entrepreneurship Education,
- Member of the Irish Research Council for Science, Engineering and Technology,
- Member of the Steering Committee of the Entrepreneurship Network of the European Foundation for Management Development.



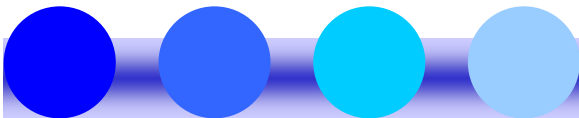
What is ECSB?

- The network of ECSB´s members covers nearly the whole Europe geographically; it has **over 500 members from 35 countries**.
- Through its affiliation to the **International Council for Small Business** since 1989, the European network is also connected to the global academic and professional small business community.
- The European Council for Small Business and Entrepreneurship (ECSB) is a non-profit organization whose main objective is *to advance the understanding of entrepreneurship and to improve the competitiveness of SMEs in Europe*.
- ECSB facilitates the creation and distribution of new knowledge through research, education and the open exchange of ideas between professions and across national and cultural borders.
- ECSB organises for its members high-quality conferences, such as **the RENT conference** in co-operation with EIASM, in order to facilitate and enhance the exchange of knowledge within the ECSB membership. The exchange and creation of knowledge is also possible at **the internet platform (www.ecsb.org)**.
- Another important field of activity of ECSB is *co-operation with various governmental institutions* interested in improving the understanding and development of small businesses and entrepreneurship in general.



Benefits of Membership of ECSB

- Free copy of the Journal of Small Business Management (four issues annually),
- The ECSB Newsletter, which contains up-to-date information regarding research, education and other activities in Europe,
- Admission to International Conferences at reduced registration fees (e.g. ICSB World Conference, etc.),
- Access to knowledge of small business and entrepreneurship experts all over the Europe through the internet platform (www.ecsb.org),
- The internet platform also enables the development of joint projects within the membership, as well as participation on the members' forum,
- Free access to an online journal called Inter-RENT,
- 35% discount onto entrepreneurship books published by Edward Elgar, including ECSB's own anthology "Frontiers of European Entrepreneurship Research",
- Ability to purchase other journals (e.g. ISBJ) at reduced rates,
- Participation in the Doctoral Consortium at the RENT Conference at a reduced rate,
- Free case study book 'European Cases in Entrepreneurship', with teaching notes available in membership area,
- Regular case study competitions open only to ECSB / ICSB members only,
- Access to the ICSB website members directory, plus full benefits of ICSB membership.



Challenges to Writing a Case Study

- Not rewarded in academic career
- Too time consuming
- Feel you are not skilled enough
- Companies reluctant to give information



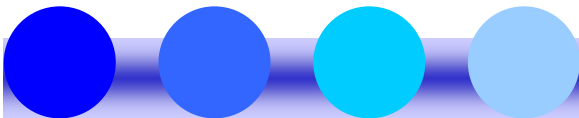
Why You Should Write a Case Study

- Helps tailor your course / programme
- Provides students with ‘local heroes / role models’
- Bridges divide between theory and practice
- Gives you a better understanding of key issues in the business world
- Develops your own communication skills



What Is A Case Study?

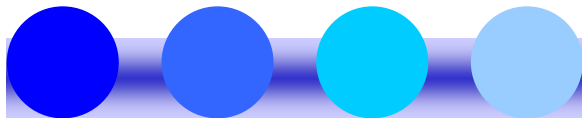
- Story
- Field based
- May be disguised
- Is incomplete
- Invites you into a role
- Takes you forward
- Involves analysis and prescription



Alternative Definition

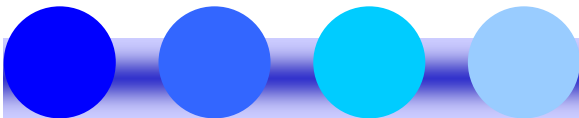
“ A case is a description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person or persons in an organisation. The case requires the reader to step figuratively into the position of a particular decision maker”

Leenders et al



Case Study Vs Case History

- Forward focused
- Usable at all levels depending on the case complexity
- Invites you into a role
- Backward focused
- Useful early (1st years)
- And post experience (MBA?)
- Invites judgement



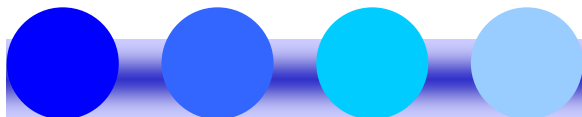
Why Use Cases?

- Learning by doing/simulating
- Applying earlier learning
- Learning from peers
- Teaching peers
- Structure own environment
- Working with others



Skills Developed By Cases

- Analytical
- Decision making
- Application of theory
- Oral communication
- Time management
- Interpersonal/social
- Creative
- Written communication



Some Caveats

- Students do not live with decision
- No right answer
- Increasingly easier to access other material
- Cases date
- Useful lifespan is getting shorter



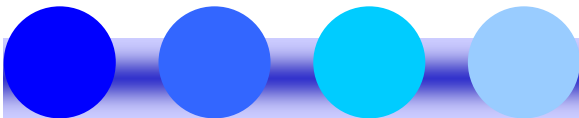
Process Is Layered

- Individual preparation
- Small group discussion
- Listen to presentation in class
- Large group discussion
- Facilitator



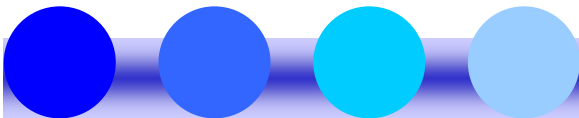
What Makes a Good Case

- Meaty issues
- Creates a decision point (or points)
- A good story (but the story is not the objective)
- Students can engage (not the same as 'like')
- Up to date
- Readable
- Invites you forward
- Functions at different levels
- Is realistic
- Is clear about target audience
- Relates well to course subject area



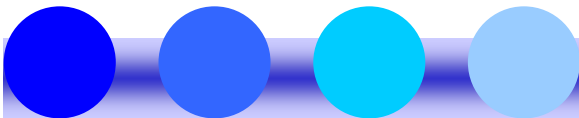
Sources Of Cases

- Worked with company
- Ex-students
- Other contacts
- Professional Institutes
- Chance meeting
- Friends
- Published sources



What Are Your Sources

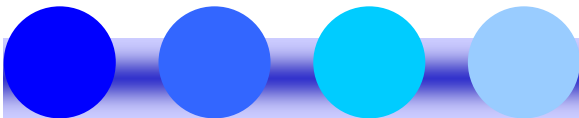
- A previous life?
- Past students
- Post experience class (e.g. MBA)
- Joint case with somebody else
- Emerge from project/dissertation
- Friend/relative
- Consultancy
- Cold call/contact
- Attend a seminar
- News item



Why Write A Case Study?

Be Clear On Your Purpose

- Your own students in class
- As individual or group assignment
- For dissemination
- For publication
- For 'brownie' points
- Competition
- Other?



Levels Of Cases

- Parochial
- National
- International
- Global
- Universal



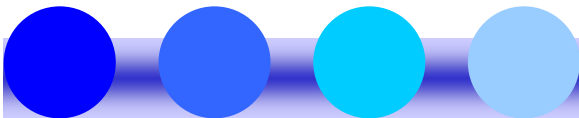
Typical Case Layout

- Introduction / opening paragraph
- Organisation background
- Focus on the area of interest
- Examine specific problems / decisions
- Outline possible alternatives but.....
- Close



Case Length

- What will you use it for?
- Be prepared to edit – long and rambling is easy
- Many advocate max 10 typed pages + appendices
- I suggest approximately 15 pages
- Make sure you get all details right



Disguising Material – Why?

- Need anonymous source
- Secure data
- Throw students off the scent
- Disguising is easier in small organisations
- Be very careful of figures which do not add up
- Avoid humour
- Remember it may be out there for a long time



Action Triggers

- A communication
- An inspired thought
- A significant internal event
- A significant external event



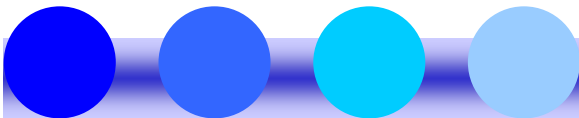
What Does Action Trigger Do?

- Starts the clock ticking
- Indicates the timeframe available to the decision maker
- Introduces the context
- Indicates the focal person(s)
- **AND BY THE WAY, ALWAYS WRITE IN THE PAST TENSE**



All Cases Date

- Issues change and are in public domain
- Company closes
- Internet destroys it
- Student retention of material from previous year
- Just too old



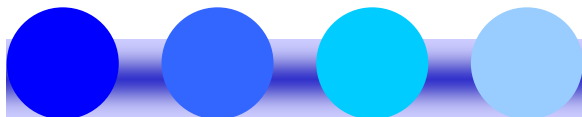
What Does a Poorly Constructed Case Look Like?

- Dense
- Repetitive
- Rambling
- Company is mentioned on P.8
- No congruency between position of company in food chain and the issue under consideration
- Teaching Note repeats case material



Issues With Large Organisations

- Generally more sensitive
- May have stock exchange issues
- Will need formal clearance
- May require clearance by several layers or at a high level
- Are likely to be more remote and less involved
- Usually understand the case study concept better



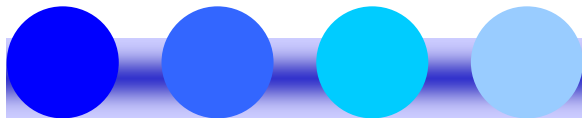
Issues With Small Organisations

- Clearance is easier / less formal
- Managers/owners are less likely to have any experience of the concept
- Issues in the case are more likely to be parochial and so not travel well



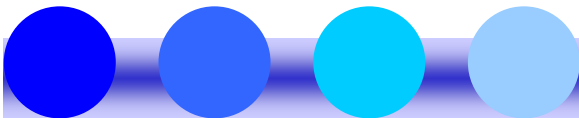
Think Beyond Commercial

- Large selection of not-for-profit organisations
- They are often rich in issues
- Fundraising
- Government bodies
- Community
- Local Government
- Local facility
- Demarketing



Contacting The Organisation

- Personal contact is invaluable
- You must explain the process
- And where the material will end up
- What is in it for the organisation?
- Might they attend or be given presentations?
- Limited value with undergraduate
- More value with post experience



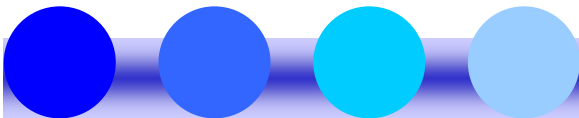
Sourcing And Collecting Data

- Within the organisation
- Interviews
- Published reports
- Newspaper files
- Internet
- Libraries
- Students who attempt the case!



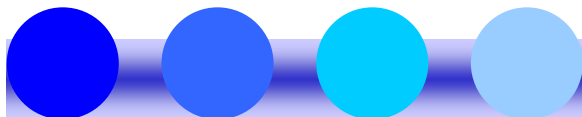
Common Errors And How To Avoid Them

- Flattery – keep it factual
- Figures don't add up – check for consistency
- No clear decision point – is it worth the effort?
- Rambling – examine each paragraph and ask is it essential
- Limited options – is it worth it?
- Options too obvious – bin it?
- Not engaging – bin it?
- Too engaging – tone down the rhetoric



Editing A Case

- Edit and re-edit
- Proof-read and get somebody else to do it also
- Reference properly
- Put your copyright on front or back page
- Include disclaimer on front page
- Sort contents under appropriate headings
- Make sure appendices are tidy and coordinated with main text
- Assume it will be published and (maybe) read by your peers
- Be careful how you state things
- Embrace external editing!
- Always, always write in the past tense
- Is a case study ever finished



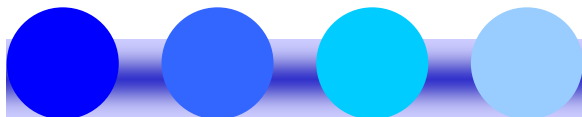
Is A Teaching Note Essential?

- Probably
- Necessary evil
- ECCH note a bigger take up with a TN
- Useful for case teachers
- And for students
- Good discipline



What Should A Teaching Note Contain?

- Case summary
- Teaching objectives and target audience(s)
- Suggested teaching approach and strategy
- Analysis techniques recommended and, preferably worked through
- Additional readings and references if helpful
- Suggested strategy development and/or strategy questions which might be raised
- Feedback on use and update if available



DOs & DON'Ts With A TN

- Do try teaching the case on a class before writing it
- Don't introduce new material which properly belongs in the body of the case – it is unfair to students
- Do revisit it once or twice
- Don't let it into the public domain

