

International Collaborative Case Research

Carol J. Cumber (E-mail: Carol_Cumber@sdstate.edu), South Dakota State University

Abstract

“Why don’t you say no if you mean no?” “How can we discuss the central issues of a case if not everyone understands what is meant by ‘issues’?” “How can I lead if I don’t know where I’m going?” The author faced these questions, and many more, while exploring collaborative case research opportunities in other countries. This personal and professional journey taught her that the prospect of increasing global awareness for her students and herself is enticing. Another lesson learned is that the opportunities to appear to be an insensitive, cultural illiterate are abundant. This paper focuses on the benefits and challenges of collaborative case research across national boundaries. Illustrations of cultural miscues and misunderstandings are given. Cultural consciousness structure differences are explored. Insights and rewards gained through international experience are highlighted.

1.0 Introduction

Interest in the case method has grown dramatically from the days when it was commonly associated almost exclusively with the Harvard Business School. It has expanded in terms of disciplines embracing the technique, and in relation to it being increasingly adopted throughout the world. With an expanded global focus have come additional opportunities to collaborate internationally. The focus of this paper is on the benefits and challenges of collaborative case research across national boundaries.

2.0 The Case Study Approach

A common theme in college education is the need to produce critical thinkers and problem solvers, yet the research indicates that we are falling short of our goals (Cumber, 1995). Kratz submits that the dramatic increases in technology must be coupled with the ability of the user of analyze and synthesize information (1991).

In response to this need, there has been a dramatic increase in experiential opportunities for students. The promotion of “teaching for thinking” has encouraged many teachers to modify curriculum materials and instructional strategies so that the focus in the classroom is on the analysis of important curriculum issues (Wassermann, 1994). The case method is a popular approach used to facilitate experiential learning. So, what is a case? According to Wassermann,

“Cases are complex educational instruments that appear in the form of narratives. A case includes information and data-psychological, sociological, scientific, anthropological, historical, observational, and technical material. While cases are centered in specific subject areas, for example, history, pediatrics, government, law, business, education, psychology, child development, nursing, and so forth, they are, by their nature, interdisciplinary. Good cases are drawn around problems, or “big ideas” – those significant issues in a subject that warrant serious, in-depth examination. The narratives are usually constructed from real-life problems confronting real people” (1994:3).

Readers with comments or questions are encouraged to contact the author via email.

Lawrence submits that a good case is a “chunk of reality” brought into the classroom. Class discussion is grounded in real life problems and situations. The student must take an active role in assessing and offering solutions for these problems and situations (1953).

It is commonsense that students will be more productive when they work on a task that interests them. Greenwood suggests that the situations presented in a written case study entice the student and may result in strong reaction (1993). After thoroughly analyzing the information provided in the case, students apply curriculum concepts and practice the give and take that naturally occurs when peers of differing perceptions and interpretations offer their solutions to the major issues.

Although cases are used in myriad disciplines, the case illustration used in this paper will be limited to business, the author’s primary interest area. The case approach is very popular in business, economics and administrative contexts (Reidenbach and Robin, 1990). A common approach to constructing and implementing cases for these contexts typically consists of the components of: 1) identification of the problem (central issues), 2) generation of alternatives, 3) evaluation of alternatives based upon a cost-benefit analysis, 4) selection of the “best” alternative, and 5) implementation of the selected alternative (Malloy and Lang, 1993:511).

3.0 A Personal and Professional Journey

Having been exposed to the case method approach as a graduate student, and subsequently writing and using cases as a major classroom pedagogical tool, the author is a strong advocate of this teaching method. One of the alluring aspects of writing and using cases is that the potential combination of organizations and situations are nearly infinite. Having researched and published cases on organizations as varied as churches (Cumber and Reed, 2001), regional railroads (Reed and Cumber, 2000), videographers (Earl, Flournoy, Reed, Cumber, Kohers, 2001), fraternal organizations (Hansen and Cumber, 2001) a “Goosemobile” (Cumber and Satterlee, 2000), and even adult entertainment establishments (Reed and Cumber, 2000), it’s easy to conclude that new situations and issues are always available.

A particularly exciting aspect of case study research is the relatively recent explosion of international attention given to this approach. Due to opportunity and interest, the author was able to expand her case research endeavors across national boundaries.

4.0 International Case Writing Conferences

Although the United States has historically been considered a leader in the development and use of the case method (McNair, 1954), it would be inappropriate and inaccurate to discount the growing international interest in this approach. Conferences dedicated to increasing awareness of the case method have proliferated. The following is one such example:

At a Case Writing Conference at the University of Wageningen, Wageningen, The Netherlands, held in October 2001, participants from the United States, Denmark, Chile, Mexico, and The Netherlands discussed the myriad issues involved when developing cases and utilizing them in the classroom. This weeklong intensive workshop yielded a bounty of cross-cultural learning opportunities. They were able to learn about teaching styles that varied from expectations of straight lecture to full class discussion. They also learned a valuable lesson in the pitfalls of making assumptions. A case in point: Although the participants came from different countries with different native languages, the common language was English. As an American abroad, the author was repeatedly awed and humbled by the impressive English language skills of the other participants. Early in the conference the participants were asked to retreat to a quiet place, with the mandate to read a short case, identify the central issues, and report back to the group for discussion. Upon reconvening, several members of the group admitted that they couldn’t complete the task because they were unsure of what was meant by the English word “issues”. The discussion soon segued into a dialogue of how often we may inadvertently distress our students by not ascertaining whether a term has been correctly operationalized.

When considering using the case method in the classroom, the group soon realized that expectations in the classroom would impact how readily this approach would be embraced, or even accepted. They agreed with the following generalizations:

| Expectations of Students | |
|---|---|
| U.S. | Elsewhere |
| Seeks out professor outside of class | Asks other students if s/he has questions |
| Thinks for him/herself | Depends on Teacher’s knowledge |
| Involved in classroom discussion | Able to cite authoritative sources |
| Expectations of Teachers | |
| Interesting, enthusiastic, humorous | Knows all the answers |
| Discusses rather than lectures | Behaves in a seemly fashion |
| Gives assignments which require analyzing, synthesizing, not rote | Teaches the “what,” not “why” or “how” |

(Source: South Dakota State University International Programs Office, Brookings, SD)

Whereas, for the most part, the existing structure in U.S. universities would facilitate the discussion based, analysis focus the case approach brings, elsewhere, wholesale parameter shifts of expected behavior of both students and teachers would be necessary. One must conclude that for many, the labor extensive process of writing the case materials is just a first step in a long journey to successful use in the classroom.

5.0 International Collaborative Case Research

With the recognition that the world is moving ever more rapidly toward a global economy, there has been an increased emphasis on understanding and managing cultural differences (Harris & Moran, 1987, 1996; Trompenaars, 1994; Earley & Singh, 2000).

Facilitated by a well-established faculty/student exchange agreement between South Dakota State University (SDSU), Brookings, SD and Chungnam National University (CNU), Taejon (recently renamed Daejon), South Korea, an opportunity presented itself for the author to travel to Taejon and collaborate with a strategic management professor at CNU. Being immersed into an Eastern culture offered many exciting prospects; being alien to that culture many potential challenges.

To prepare for the experience, the author reviewed some of the differences one might expect to find between Koreans and Americans (see table below). Although one should take care to remember that both Korean and American societies are evolving and avoid the danger of painting either country with too “broad a brush”, some contrast generalizations can be offered:

In a male-dominated culture where men and women commonly lead quite segregated lives, status is an important consideration, and friendships develop over time (Oak and Martin, 2000), the author realized she had an interesting collaborative experience ahead of her. The collaborator and author had not yet developed a relationship. An American’s view of friendship is significantly different than a Korean’s. Whereas we might introduce someone we just met as “our new friend,” in Korea, calling someone a friend is not taken lightly, as it is understood that there is an obligation to that friendship. Additionally, if a friend asks a favor, the expectation is that you will agree because of the commitment to the friendship (Oak and Martin, 2000). Foreigners would be well advised to not equate politeness with friendship.

Upon review of the contrasts, many differences between the newly formed acquaintance of the collaborator and the author were identified: East vs. West, male vs. female, full professor (and later Dean) vs. associate professor, older vs. younger. Throw in language differences, plus the distance through which we would need to communicate upon returning home, and the result was a meaty stew of cultural differences to sample. All of this, of course, would have to be dealt with in addition to the actual research work.

| Consciousness Structure Differences | | |
|--|---|--|
| | Koreans | Americans |
| General Background: | Confucianism Past-Oriented Manual Labor disparaging | Christianity Future-Oriented Manual Labor evaluative |
| Self-Identity: | Introversion & Interdependence We-ism Conformistic | Extroversion & self-reliance Me-ism Individualistic |
| Personal Relations: | Closed-minded to strangers Social status exists | Open-minded to anyone Egalitarian, pragmatism |

| Consciousness Structure Differences (cont). | | |
|--|---|--|
| | Koreans | Americans |
| Age: | Sign of grace, respect and piety Decides speech levels, address, title | Is less important Has less to do with styles |
| Sex: | Male-dominated paternal society Father-son relationship central Gentlemen & elderly first | More equality between the sexes Husband-Wife relationship central Ladies first |

(Source: Dr. Sung-Chul Shin, Past Director of International Programs, Chungnam National University, Taejon, South Korea)

The author recalled having read admonitions to take care to not appear as an “aggressive, bold Western woman,” (Axtell, 1995:111) but was unsure what affectations would get her branded as such. The following story regarding the expected role of women was informative:

“An American businesswoman tells of one trip she made to South Korea where a Korean businessman said to her, ‘I am sorry about your husband.’ Not comprehending, she asked what he meant. ‘Oh,’ he said, ‘I noticed your wedding ring and so I assumed you are a widow.’ ‘Why would he conclude that?’ she asked politely. His answer was, ‘Because if he were still alive, I assume you would still be at home taking care of your home and family’ (Axtell, 1995:111).”

6.0 The Han-Mi Towel Company

In constructing a business case, it is imperative that information be provided to the student so that they can properly analyze the business and make decisions regarding the central issues facing the organization. They then suggest appropriate plans for the organization’s future. The choice of which business to analyze is critical to the development of the case. What was so interesting about the Han-Mi Towel Company was that, as the second largest towel manufacturer in South Korea, it not only survived the Asian economic crisis of 1997-98 that had bankrupted many larger and older Korean businesses, it was able to maintain a profit. At first glance, the organization seemed an excellent candidate for a case that had issues relating to financial management as its central focus.

The author was fortunate to work with a CNU professor known to be an expert in strategic analysis. He had written a book about the towel industry in Korea, and had graciously agreed to collaborate, even given all our differences. It is uncommon for a stranger to directly introduce himself or herself to someone else; therefore his relationship with the Vice-president of Han-Mi Towel provided the introduction needed to gain entry into the organization.

A meeting consisting of refreshments and general conversation prefaced a tour of the facility. The pace was unhurried and deliberate. The Vice-president personally conducted the tour. He led, followed by the male collaborator, then the author and another woman. This was in contrast to the tour of Chungnam National University taken earlier in the day. During this tour organized by members of the CNU faculty, a delegation of SDSU faculty and students were introduced to campus buildings and sites. Included in the delegation was SDSU’s president (who, as a very high status, titled female, was a bit of an anomaly for our Korean hosts). As always, we were treated formally and very politely. As the highest-status person deserving of deference and respect, the SDSU president was expected to lead the way even though she had never previously toured the campus. As the leader of the South Dakota delegation, an American perspective on leadership was evident as she thoughtfully attempted to usher faculty and students ahead of her. The juxtaposition between the Korean expectation for her to lead, and the American expectation of “leader as good Shepard” (although she later wryly commented that attempting to lead American faculty was like herding chickens), resulted in an amusing scene rivaling a Three Stooges movie.

It was clear that the CNU professor and VP of the Han-mi Towel Company had developed a respectful relationship. That friendship made it possible to gain access to detailed organizational and financial information. Most of it, of course, was in Korean. The author had not anticipated the need to listen to descriptions of different sections of a book on the towel industry so that “post-it notes” could be adhered to indicate where translations would later be required.

Laden with documents and pictures of the Han-mi Towel Company, the author returned home. Development of a case proved daunting. The Korean accounting system was different than the American system, some industry jargon was unique to the country, and finding and financing a translator was difficult. The means of communication now consisted of fax and email. When emailing questions or materials to edit, sometimes there was no response. Why? Was it because the email didn’t arrive? Was it because he was working on it and would respond when finished? Was it because he was not in the office and didn’t receive it? Was it because he was too busy? Or, was it because, for whatever reason, he was not comfortable in saying “no” to the request, and so simply didn’t respond? This last possibility, although culturally appropriate for Korea, is alien to most Americans. Recall that the development of a relationship implies an obligation or commitment to that relationship. SDSU and CNU have a long and well-respected exchange relationship, and we were representatives of our universities. In Korean society, you show yourself to be trustworthy and dependable by not refusing a friend’s request (putak – favor) (Oak and Martin, 2000). Additionally, avoiding confrontation or embarrassment in any situation is central. The author constantly had to assess whether she was putting her collaborator in the potentially embarrassing (losing-face) position where he was unable or unwilling to fulfill a request, and so would simply not respond. As an American, it seemed second nature to expect a yes or no answer to a question.

7.0 The Final Result

In the end, the biggest hurdle faced was not gender, age, status or title, but the realization that what constituted effective organizational management practices was presented from a different perspective at Korean compared to American universities. In the expectation that students would conduct a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the organization, the author learned that dependant upon a “West” versus “East” perspective, the analysis would yield very different results. The following table lists some dimensions in which one could compare East vs. West managers:

| General Comparison East vs. West Managers | | |
|--|-------------------------|---------------------------|
| Dimension | West | East |
| Pace of Work | Hurried | Deliberate |
| Decision Making Process | Individualistic | Consensus |
| Response to Authority | Challenge | Obey |
| Ethics | Define | Situational |
| Value Experience | Respect Youth/New Ideas | Respect Age/Tradition |
| Negotiating Style | Open/Fair | Win at any costs strategy |

(Source: Motorola Human Resources Department, Motorola, Inc. Schaumburg, IL)

In reviewing the table, it became quickly evident that it would be extremely difficult to construct a business strategic analysis case of equal relevance to both American and Korean students. For example, if the case was written to note that the manager made a pivotal decision on his own within a three day time period, an American student would likely praise the manager for his individualistic, rapid decision making prowess. A Korean student, however, might conclude that these same traits were faults, for the manager was brash and ignored the importance of the group harmony that comes from consensus decision making.

The inability to construct a “one size fits both” case led to an evolution in the collaboration. It became readily apparent that perhaps the story waiting to be told was not one of financial and strategic management, but rather one of cultural awareness and mutual respect of cultural differences in business practices. This realization led to the jointly authored paper, “Experiences at the Han-Mi Towel Company,” (Cho and Cumber, 2001). This paper focused on the cultural and relational, rather than primarily financial factors of managerial decision-making. Regarding the case study research, upon review, a central decision premise for American and Korean students might be something like this: “If a manager were transferred from a textiles firm in Chicago, Illinois to one in Taejon, South Korea, what issues would s/he confront and how should s/he deal with them?” Hmm.....that sounds like the makings of a case after all!

8.0 Conclusion

Global awareness is difficult to teach solely from a textbook. The importance of personal and professional experiences gained through international travel and the development of relationships with people from other countries cannot be overemphasized. International collaborative research can be both challenging and personally rewarding. 📖

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Notes