



Turning Existing Teaching Material Into Compelling Cases
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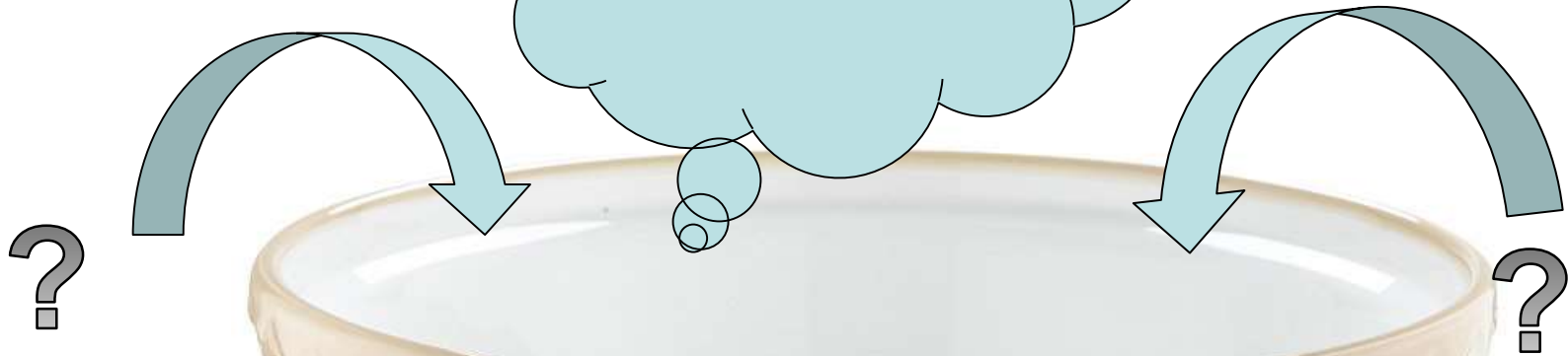
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case centre

learning



Learning
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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?



The Case Method



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**



What is a case study?



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.



adapted from J.Heath (1998)

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



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)

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

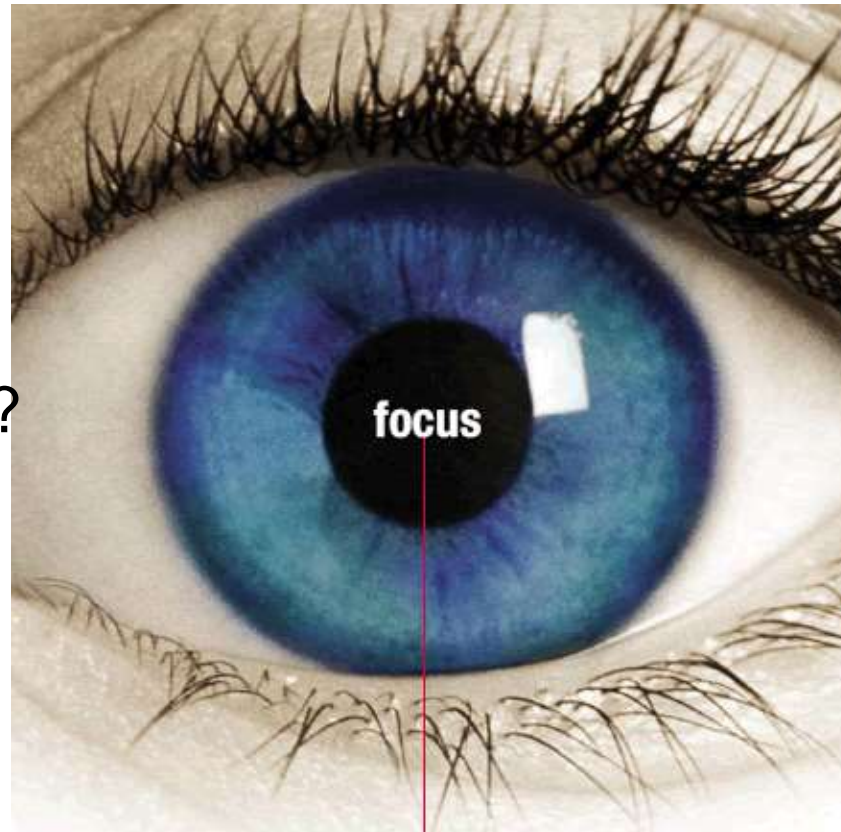


adapted from J.Heath (1998)

So what is the focus?



Leadership?
Management?
Branding?
Quality?
Decision making?
Stakeholders?
Strategy?



Research Case vs Teaching Case



- *Source RSM Case Centre*

Research case

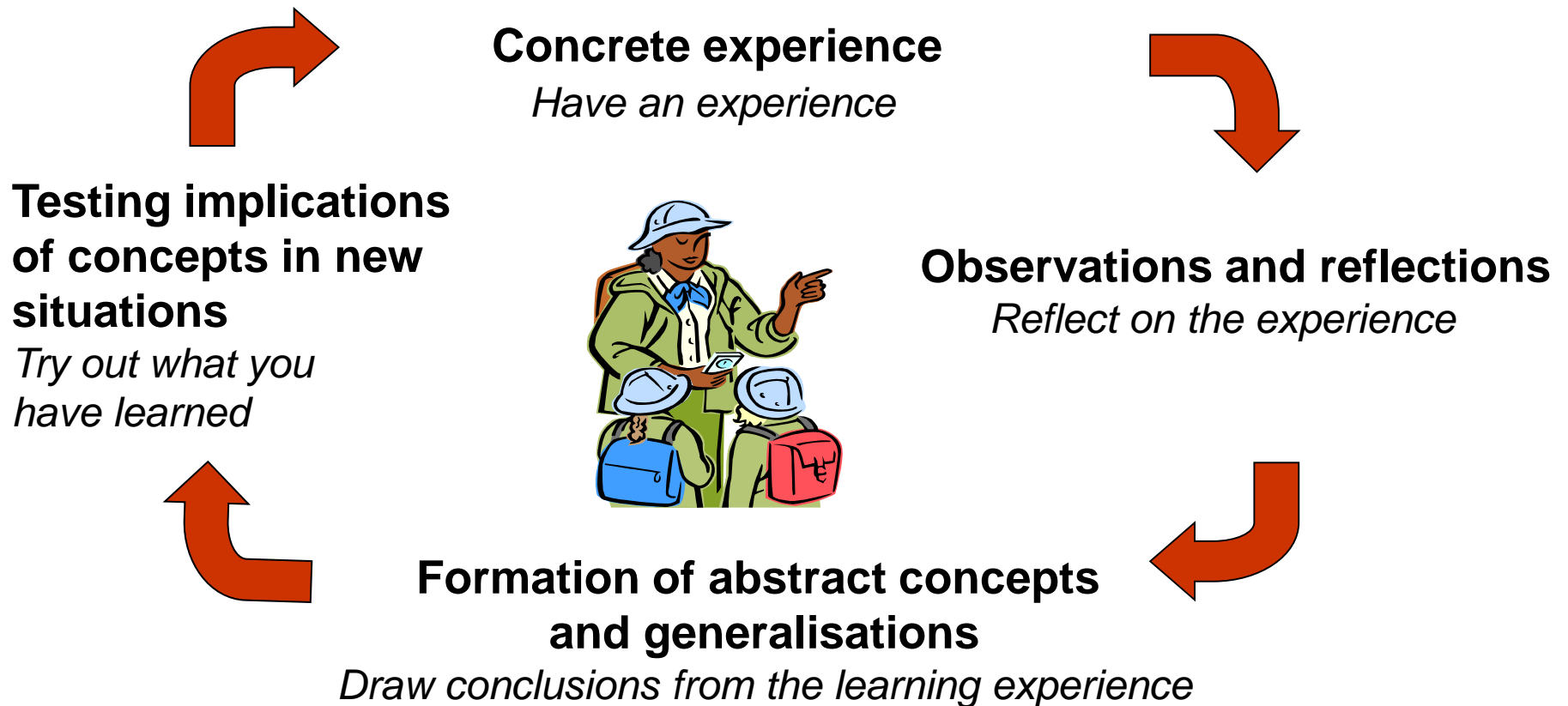
description
explanation
faithfulness
chronological
no perspective(s)
little or no drama

Teaching case

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



Experiential learning model



Case Classification



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: _____

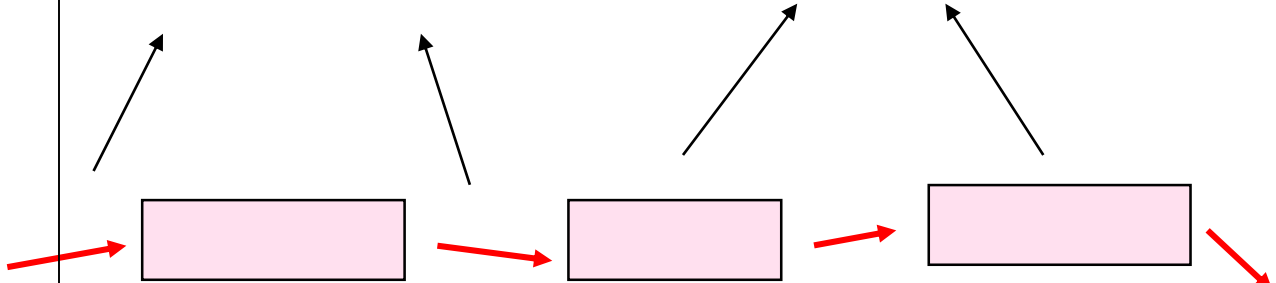
Class prerequisites

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

Top selling cases in 2015



	SCHOOL	TITLE OF CASE	DISCIPLINE	NO. PAGES	FIELD DESK	TN?
1	INSEAD	Unilever in Brazil (1997-2007)	Marketing	22	F	Y
2	HBS	Wolfgang Keller at Koningsbrau-Tak (A)	HRM/OB	18	F	Y
3	HBS	Cola Wars Continue: Coke and Pepsi in 2010	Strategy and General Mgmt	22	D	Y
4	University of California	Zara : Staying Fast and Fresh	Prod & Ops Management	20	F	Y
5	HBS	Aqualisa Quartz: Simply a Better Shower Solution	Marketing	18	F	Y
6	HEC (Paris)	Michelin Fleet Solutions : From Selling Tires to Selling Kilometres	Marketing	15	F	Y
7	CIBER	Zara	Prod & Ops Management	15	F	Y
8	Babson	Intelligent Medicine: The Novartis-Proteus Alliance (Japanese version)	Marketing	8	D	Y

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



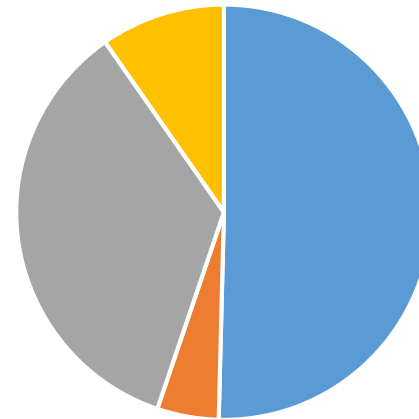
- **Armchair cases**
Based on the writer's own experience
- **Desk research**
Based on company reports, newspaper or magazine articles, television programmes
- **Field research**
Based on interviews and/or observations in the host organisation



Most common sources of Case data?



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



■ 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

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.

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)

Plot structure



***- the clash of people and ideas
the elements of drama within a case***

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.

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)

The written case - the classic Harvard form



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 to 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.

Case researching & writing



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?

