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Improving the Hook in Case Writing

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Introduction

Over time, each of the editors of the *Journal of Case Studies* has set a goal to improve the quality of publications produced by the journal. This ongoing goal has appeared to serve the journal well, as the outputs of the journal have grown stronger with each passing year. There are different paths an editor can take in pursuing increased quality, such as improving upon the review form, asking authors to provide a memo in response to the reviews, asking authors to make sure their learning objectives are consistent with Bloom's taxonomy, and providing key words to improve with indexing of cases within library databases. One path the present editors have opted to follow is to utilize the "From the Editors" section (published within each volume) as a forum to provide direction and guidance on case writing.

Toward that end, the editors sat down and brainstormed about topics that would help case writers improve the quality of their work. Although there is a long list of topics that fall under this domain, the editors literally decided to start at the beginning--with the hook. The Associate Editor, Dr. Peters, can remember attending her first SCR workshop, more than ten years ago. At that workshop, she remembers someone saying to her that, "you need to improve the hook." Thank goodness that her co-author was an experienced case writer, as she had no idea what that meant at the time! As the editors have sat in sessions over the years and experienced the review process at SCR's various journals, they have seen that comment come up again and again.

While sparse, there are a few published resources available to assist case writers in creating a hook (c.f., Corey 1998; Leenders, Mauffette-Leenders, and Erskine 2010; Linder 1994; Naumes and Naumes 2012). However, most of these authors merely state that a case writer needs an opening paragraph and they fail to provide in-depth suggestions for how to compose an effective the hook. For example, Linders (1994) states, "cases almost always start with a description of the setting—the problem or situation at hand" (p. 4). Corey (1998) similarly argues that, "in the first page or two, the case action issue, as perceived by the company manager, should be stated" (p. 6). Leenders et al. (2010) go a little more in-depth by stating, "the intent of the opening paragraph is to present a capsule of the issue the reader will face … it is an eyepiece or lens that directs the reader of the case through the subsequent information" (p. 72).

Naumes and Naumes (2012) provide the most in-depth information related to writing the hook, when they argue that a hook is, "a statement at the beginning of the case intended to get the reader interested in the case" (p. 126). Naumes and Namues (2012) state that the introduction presents the focus of the case and gives the reader a person with which to identify. The case should begin with a description of the difficult issue that a manager is facing and should provide "enough information about the individuals, organization, situation and issues that the reader is motivated to continue reading the case" (Naumes and Naumes 2012, p. 129).

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News Leads Translated into Case Writing

If one accepts the premise that case writing is an art, very much like telling a good news story that is grounded in field research and theory, then case writers could look toward the field of journalism to provide ideas on how to improve the hook that extend beyond Naumes and Naumes (2012). Journalists call the opening paragraph to a story the "lead." Within the field of journalism, the lead answers two fundamental questions: "what is the story" and "so what?" According to Scanlan (2000), leads are the foundation of every news story and they "dictate all that follows" (p. 115), which seems to parallel the hook in case writing. The hook should present the central issue that will serve as the focus of the case and, at the same time, should invite the reader to want to read onward.

The pre-eminent source on writing news leads is newspaper editor, Jack Hart, who published a "Lexicon of Leads" in 1997. Hart's (1997) leads fall into two categories: straight leads (which are direct in the style) and feature leads (which are indirect in the style). The purpose of the straight lead is to tell the reader what is the news as quickly as possible.

Straight Leads

Hart identified two types of straight leads: summary leads and analysis leads. Summary leads are based on the idea that the author should summarize the story into a single, introductory paragraph. Analysis leads similarly provide a summary but they also incorporate an analysis of the events that "put the news into perspective" (Scanlan 2000, p. 127). In other words, analysis leads involve some sort of interpretation of the events, along with the summary information.

For case writers, a basic straight hook would involve an opening paragraph that summarizes the problem or situation that the manager is facing (i.e., a summary lead). A straight hook seems to parallel what is described as the opening paragraph in much of the case writing literature. For example, this style seems to be described by Linder (1994) when he states that cases should start with a description of the situation at hand.

Joyner, Frantz, and Crane employ the basic straight hook in "Whispering Pines: Pining for Answers." They offer the readers a clear description of the new board member's concerns regarding the issues the case presents by giving a summary of a recent board meeting and a brief history of Whispering Pines as a retirement home. Similarly, Nelsen and Valadez use this basic straight hook in "Resistance to Technological Change: The Case of the Unused Calculators." In the first paragraph, readers understand the problems associated with a teacher's trying to introduce innovative learning technologies to an audience resistant to change. Trybus also introduces the new sales manager's dilemma via the basic straight hook. In "New Sales Manager Possible Dilemma: Inclusive Title of America, West Michigan," the readers are immediately introduced to the competitive environment of the title insurance business and the problem of how a new sales manager could direct his team to survive and thrive in the environment.

Students will likely appreciate the fact that these authors have used a straightforward approach. One criticism of case studies is that they require too much time to complete (Yin, 1994). A basic

straight hook allows students to spend more time analyzing the issues presented in the case and less time trying to identify the key issues.

As for the second type of straight lead, if the case writer introduces opinion or judgment into the description of the situation at hand (i.e., the case write introduces the idea that the situation was particularly bad), then he/she has created an analysis hook. Simply put, an analysis hook would do more than just describe the situation at hand. It will introduce feeling and opinion to the context, such as the situation being dreadful or fraught with uncertainty. In "Midwestern University: Leadership Under Pressure," Lui introduces the case of upset alumni toward a university, which is becoming more and more dependent upon donations from its alumni. By the time the readers have read the first sentence, "Not a damn dime!" they know that the situation is tense, emotions high. Many students will appreciate Lui's approach simply because of the excitement it creates. Although students will learn valuable lessons in leadership from the case, they will also enjoy the drama that the analysis hook helps to convey.

Feature Leads

Feature leads are more indirect in nature. Instead of being based off of a summary of the news, these types of leads are designed to grab the readers' attention and draw them into the story. An indirect lead presents an opening that sparks curiosity, without giving away the ending of the story. Feature leads appear to be more akin to Naumes and Naumes' (2012) description of the hook as the opening intended to get the reader interested in the case (p. 126).

Hart (1997) identified four types of feature leads: anecdotal, significant detail, round-up, and emblem leads. An anecdotal lead begins with a mini-story that illustrates the larger story's overall theme. Basically, this is a compressed version of the story, similar to one scene that is part of a larger whole movie. The scene would include characters, dialogue and setting. This type of lead is intentionally designed to intensify the curiosity of the reader.

Thus, an anecdotal hook would do more than summarize the situation at hand. It would include a mini-story that is part of the bigger issue to be presented in the case (Scanlan 2000). This style of hook would, for example, present a conversation that was taking place between the manager and employee, which was indicative of an ongoing or larger problem that the manager needed to address. Peters, Peters, and Schultz use a conversation as their hook in "Currency Machines Incorporated; A Firm Valuation for a Succession Plan." A young couple moves to a new town, meets another couple, and is asked to assist with a firm valuation. Through the development of the conversation at their first encounter, the readers learns--by the second paragraph—that they will be identifying, learning about, and assessing ways to value a business. The approach used by Peters, Peters, and Schultz can be very effective in preparing students for situations they might encounter in the workplace. New hires to an organization frequently hear stories and anecdotes from their co-workers about their new place of employment once they begin working. Students who make the connection between the mini-story presented in an anecdotal hook of a case study and the larger issue in the case will likely be able to use stories and anecdotes in their new place of employment to draw conclusions about their new organization.

In contrast to presenting a mini-story, a significant detail lead begins with a close-up look at a significant or interesting detail (Scanlan 2000). A significant detail hook would similarly begin the case by presenting an interesting detail that would pique the reader's curiosity. When using a significant detail hook, for example, the case writer would provide an interesting piece of information that points to a larger issue, such as a human resource manager who is reviewing reports and finds out that they have a 50% turnover rate within the organization.

Brooks, Cox, and White use adverse publicity statements to hook the readers into "Spirit Airlines Controversial Promotional Campaign." Their case begins with the words, "Outrageous, over the line . . ." to pique the readers' interest. What is outrageous; what is over the line? By the end of the first sentence, readers are looking to evaluate Spirit airline's promotion. This approach will likely be effective because students are curious by nature. Brooks, Cox, and White allow the student to immediately start questioning the significant detail hook and to begin forming their own hypotheses about Spirit's promotional campaign.

A round-up lead is another type of feature lead. This type of lead presents a series of anecdotes, illustrations, or examples in order to demonstrate a trend (Scanlan 2000). Case writers could similarly use a round-up hook, where the manager, through a series of similar incidents, realizes that there is a problem within the organization. For example, on several occasions, the manager of a grocery store may find the cash balance does not match the receipts for the cash registers at the end of the day.

The fourth type of feature lead is called the emblem lead. The emblem lead attempts to put a human face on the problem. This type of lead typically uses a single individual (or instance) to illustrate the theme of a story (Scanlan 2000). The lead could even include a quote from that individual. For case writing, the emblem hook could be used when the author begins with a description of the innovative, energetic entrepreneur. For example, the case may begin with the CEO, who is like the white knight of the organization, and there is another problem that he needs to resolve.

Whaley and Walker employ an emblem lead through protagonist President and CEO Keil who has returned to Hammerhead Systems Company to lead the firm in a more successful direction. This approach is appealing to students because it helps to personalize the case study. Students usually have multiple assignments to complete in the various courses they are taking in a given semester. The emblem lead utilized by Whaley and Walker will increase student interest and help them relate to the protagonist. Increased student interest will help the case study become a valuable learning experience rather than just another assignment that must be completed.

Where to Begin

Scanlan (2000) acknowledges that writing a lead can be very difficult. Most case writers would similarly argue that writing a great hook is also a difficult task. Thus, Scanlan (2000) gives advice on how journalists can go about writing the lead that could also translate to writing an effective hook.

According to Scanlan (2000), "to write an effective lead you have to know, first and foremost, what the story is about" (p. 135). Scanlan suggests the author start the process of writing a hook by answering the following questions: what happened, who did it happen to, where did it happen, when did it happen (or when is it going to happen), why did it happen, and how did it happen (p. 135). Once the journalist has the answers to these six basic questions, he/she should distill that information and utilize it to answer two basic questions: what is the news and what is the story about (Scanlan 2000, p. 135). Once the journalist has been through that exercise, he/she is ready to write the lead.

Case writers should similarly sit down and run through the same list of questions prior to writing the hook. It is important for the case writer to have a clear understanding of what happened, who it happened to, where it took place, when it happened, why it happened, and how it happened to help determine the focus of the case. Furthermore, once the case writer has a strong grasp of the answers to those questions, he/she should be able to articulate: what is the problem or situation at hand and why is that important to the audience. In other words, if the case writer has a good understanding of the details of the story, as well as the major focus of the case and what it teaches to the reader (i.e., why it is important), then he/she has a good foundation from which to begin to write the hook.

Scanlan (2000) also suggests that journalists think through the lead before they start writing the rest of the story. However, if the writer feels that he/she is spending too much time dwelling on the lead, then it might be best to start writing the story and return to the lead at a later point in time. Case writers should go about writing the hook in a similar fashion. After completing the interviews for data collection (or analysis of secondary data documents), it may become clear what would make a great hook for the case. For example, in the interview with a manager from the company that person may have given a great quote to the case writer. That great quote, along with a description of the dynamic individual who gave it, could serve as an emblem hook for the case.

Alternatively, it could be that the hook does not immediately emerge during the data collection process for the case writer. In that circumstance, the case writer may find it more fruitful to first write out the various sections of the case and then step back to see the big picture after all the sections have been composed. At that point, the case writer would then have the ability to write a summary or analysis hook.

Scanlan (2000) gives two other useful suggestions for writing the hook. He suggests "trying to put yourself in the role of the reader" to help identify "why does this news matter" (p. 136), and to always "look for the tension in the lead" and good leads often "provoke a question" (p. 136). While Scanlan's suggestions are directed to journalists writing leads, both of these ideas appear to be applicable to writing an effective hook for a case.

When composing the hook, the case writer should attempt to step into the role of today's student who might ask why the case is important or relevant. Students can be engaged for a variety of reasons, such as the cutting-edge nature of the topic, its relevance to their recent course work or their interest in a particular career field, posing an interesting question, or even presenting tension in the situation that they have to analyze. Stepping into the role of the student and

making sure the tension (or question posed) is clear and relevant will improve the ability of the hook to draw in the reader.

In conclusion, case writers need to learn to write an effective hook that summarizes the problem at hand while simultaneously drawing in the reader. To the extent that a hook is similar to the news writer's lead, the field of journalism provides ideas and suggestions for how to improve the beginning of a case. Case writers should explore the various types of hooks that can be developed, when looking at the introduction to the case from a journalist's perspective. Hopefully, incorporating these ideas will help improve the quality of cases being produced by the field.

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