

Case Writer's Workshop

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At each annual summer Society for Case Research (SCR) workshop, we have offered a Case Writer's Workshop. This pre-meeting workshop has been well attended, usually by instructors new to the case research method. Their main interests in the workshop concerned their learning about how one conducts case research and then, how to write an effective case and teaching note to be submitted at a future conference and/or reviewed at one of the SCR journals (*Business Case Journal*, *Journal of Case Studies*, and *Journal of Critical Incidents*). During the MBAA 2016 meetings, Borchers, Cellucci and Hodge (2016) developed and presented a case writer's workshop and found that the audience was comprised of those new to case research, as well as seasoned case researchers who wanted to hone their craft. Throughout our experience with these types of workshops, we have found that the attendees offer positive reviews of the points made, as well as noting that the process served to orient them to the journals published by SCR.

Thus, for this issue, our "From the Editors" article focuses on points made during the workshops. First, we will introduce who we are as the workshop presenters and describe the workshop atmosphere; second, we will summarize the content and experiences of two recent Case Writer's Workshops held during the summer 2015 and spring 2016 conferences of the Society for Case Research (SCR). The content is divided into five sections as follows:

- Discussing why case research and writing matters;
- Describing the journals published by the Society for Case Research;
- Elaborating upon the essential elements of case writing;
- Offering practice sessions (e.g., writing a hook for a case); and
- Presenting tips for the development of learning outcomes for students.

The Workshop Presenters

Each of the authors has worked on case journals as both authors and editors for a number of years, as well as participated in professional service for the Society of Case Research. Borchers has served on the Board of SCR and was Chair of the 2015 SCR Summer Workshop, Nashville, TN. A significant number of cases were presented by first time case researchers at the 2015 workshop and resulted in cases published in this journal issue. Borchers also serves as an editor-in-chief for the *Journal of Cases on Information Technology*; its mission is as follows (<http://www.igi-global.com/journal/journal-cases-information-technology-jcit/1075>):

to provide understanding and lessons learned in regard to all aspects of information technology utilization and management in individual, organizational, and societal experiences.

Cellucci and Peters have served on the Board of SCR and are editors of the *Journal of Case Studies*. Its mission is as follows (<http://www.sfcr.org/jcs/>):

to provide a continual flow of effective up-to-date cases to promote excellence in case teaching.

Cellucci noted that at her first SCR conference, she attended the case writer's workshop, led by Hodge. Hodge has served on the SCR Board and is Chair of the 2016 SCR Summer Workshop, Kearney, NE. She also serves as editor of the *Business Case Journal*; its mission is as follows (<http://www.sfcr.org/bcj/>):

to publish cases and research related to case writing or teaching with cases.

All of the authors have published cases and all have served as reviewers for various journals that publish cases. Moreover, we use cases in our classroom because they add value to the learning experience. Cellucci, Kerrigan, and Peters (2012) noted that cases provide a way for students to improve their decision-making skills, learn to better communicate their position on an issue by referring to the case facts to support positions taken, and help develop their analytic skills as they sort through information, discern important information, and determine a course of action to provide solutions to an issue or problem presented. Thus, with their experience with case writing and the publication process, as well as their shared vision that cases add value, the workshops have become an integral part of SCR meetings.

The Workshop Setting

We have planned workshops with a consistent setting that is informal, collegial, and encourages positive, focused interaction. Ice breakers allow a forum for the participants to introduce themselves. Presenters and attendees are asked to give their name, university affiliation, academic unit (e.g., Marketing, Health Care Administration, Finance, Information Technology, etc), their length of experience with case research and then, for fun, they are asked to answer questions such as, "What was the first concert you went to?" or "Name famous persons with whom you would like to have dinner?" We have found icebreakers a good tool to start, consistent with research on icebreaking and adult learning (Chlup and Collins, 2010: 34):

They help group members get acquainted and begin conversations, relieve inhibitions or tension between people, allowing those involved to build trust with and feel more open to one another. Icebreakers encourage participation by all, helping a sense of connection and shared focus to develop.

Our experience has been that the icebreaker exercises allow for people to settle in for the workshop without taking up too much time—they tend to last about ten to fifteen minutes. So, the rest of the time is spent as productively as possible on case writing activities.

The workshop is scheduled for three hours, with time for presenters to speak about case writing

and research, and time for attendees to apply knowledge learned to a case example or a case they are currently writing. Besides taking questions throughout the session, groups of participants were tasked with exercises to reinforce the material. Throughout the session, presenters and attendees offered constructive advice to each other about how to write a better hook, for example, or note the importance of permissions in field study research. It is an atmosphere of mutual respect. Such a setting is well established in pedagogical research as conducive to effective learning (Dalton, 1951; Church et al, 2001; and Preece et al, 2015). Our experience has supported that this atmosphere has encouraged networking opportunities as well. Authors find others with similar research interests and plan to collaborate on future case research projects.

Workshop Sections

Why case research and writing matters

Case research keeps faculty active in praxis. For faculty at teaching institutions that are long departed from graduate school, case writing is an ideal way to return to research and build their vita. We also advanced the importance of cases in teaching, particularly as they challenge students to work in ambiguous situations. Kuh (2008) advances the idea of high impact educational practices that very well describe case studies. His words are paraphrased below:

They help students apply and test what they are learning in new situations and provide opportunities for students to see how what they are learning works in different settings, on and off campus. These opportunities to integrate, symmetrize, and apply knowledge are essential to deep, meaningful learning experiences.

Cases are real life; the events really occurred. Case writers present events without embellishment, and they have conducted research that provides an organizational scenario, complete enough for the reader to understand the context of the events in the business setting.

The SCR Journals

Discussions during this workshop also provided a better understanding of the SCR journals and the publication process. For many participants, the timing and review process used by SCR are new. See Appendix A for a copy of the 2016-2017 timeline for the *Journal of Case Studies*. Further, the vocabulary used by SCR (such as the idea of a “critical incident” and the difference between decision and descriptive cases) is new.

The *Journal of Case Studies* and the *Business Case Journal* publish both decision and descriptive cases. In descriptive cases, the readers are to consider the series of events that have occurred and offer analysis and assessment of what attributed to the success or failure of the desired outcomes. The Lean Start Ups (Onken and Campeau, 2016) case in this issue of JCS provides a good example of a descriptive case. In Lean Start Ups, a team of students was disappointed because they were not selected as a finalist in a business model competition, so they were going back and reviewing their steps to see what went wrong.

Decision cases are more common. They allow for students to put themselves in the place of the protagonist and make and defend recommendations in the safe environment of the classroom. In

this issue of JCS, Facing and Impossible Situation? (Trocher et al., 2016) is a decision case in which a captain in the U. S. Army Reserves was in Afghanistan and was charged with convincing an uncooperative Afghan military officer to sign permits to allow more U. S. training instructors on the base. The case presented a series of decisions that students had to make about how to best approach this officer in order to get him to comply.

Decision cases allow for students to try out their ideas, management style, their decision making models without the consequences they might encounter in the workplace. It is a learning experience if, in the classroom, they offer an idea that is not sound or if they offer an idea that has merit. They are better prepared for when they experience a similar situation to the case when they have graduated and are employed. The *Journal of Critical Incidents* focuses on decision cases. This journal's mission is to (<http://www.sfc.org/jci>):

Focus on brief incidents that tell about a real situation in a real organization. The incident tells a story about an event, an experience, a blunder, or a success. Unlike a long case, the incident does not provide historical detail or how the situation developed. Rather, it provides a snapshot that stimulate student use of their knowledge to arrive at a course of action or analysis.

The *Journal of Case Studies* publishes two issues per year (May and November). Cases published in this journal typically are about ten pages in length (although we have published some that were six or seven pages and some that were longer than 20 pages). Cases published in the *Business Case Journal* are typically ten to twenty pages in length. Critical incidents published in the *Journal of Critical Incidents* must be no more than three pages, including figures and references. This journal publishes one issue per year (October).

We encourage participants to review the SCR manuscript guidelines published on the SCR web page—www.sfc.org. For the manuscript guidelines, please see http://www.sfc.org/docs/SCR_Manuscript_Guidelines_for_Authors.pdf. This document offers a step-by-step explanation of what is to be included and how to format the Summary, the Case, and the Teaching Note. Moreover, we point out the requirements of all SCR journals:

- All cases are written in the past tense
- Must have signed permissions from the organization, if it is a primary case
- Answers to discussion questions in teaching note may contain student answers
- Must have the following documents before publishing with in a Society for Case Research publication:
 - All authors must sign and provide a truthfulness statement;
 - All authors must pay the annual membership dues;
 - Permissions must be provided and authorized by organization; and
 - Must have signed permissions from each person interviewed at an organization
- Other information such as handouts, board plans, and classroom management suggestions, may be included in final section titled, “Additional Pedagogical Materials”
- The discussion questions may be what an A student answers and also contain

professor notes

- Tables text can be smaller, but no smaller than 10 point type

Two points of these requirements have been asked about during the workshops. The first concerns permissions. We encourage case researchers to secure permissions early in the case research process. It may be a frustrating experience to engage in the time and effort to write a great case and teaching note about a field experience only to be told that the people interviewed or the organization under study will not grant the permission. One way that has been effective for researchers is to have secured the permission early in the process, which shows “buy in” from the persons being interviewed. But, do so with the caveat that they have the right to review the case prior to publication. This inclusion of the promise of one more last read is one way to ensure to the corporate representative and the interviewees of the researchers’ integrity.

In the present issue of JCS, the Trinity Classical Academy case (Almond, 2016) was one in which the author obtained permissions under a difficult set of circumstances. In this case, the new headmaster of the school had to deal with some unpleasant conflict within the organization. Thus, obtaining permission to publish a case about this school’s potentially sensitive organizational issues may have been difficult, but the author obtained permission to publish from all persons involved. Not all authors may have been able to obtain permission for this type of case. Thus, if permissions are a challenge, secondary researched cases do not require permissions, as they are based entirely on publicly available sources. The Ain’t There No More case (Totten et al., 2016) in the current issue of JCS was an interesting story about a newspaper that shifted its business model away from printing a daily paper to delivering news online. This case was completely constructed from secondary research as cited in the references at the end of the story.

The second concerns the truthfulness statement requirement. We require all authors to sign a publishing agreement document that states that the manuscript does not include or contain any statements, conclusions, or information that is intentionally misleading or inaccurate. That is, the case is true, it is about real life events, and the authors have not embellished the case. As editors we work to ensure that all of the SCR stakeholders (e.g., researchers, students, reviewers, persons interviewed for a case) are treated ethically and professionally throughout the process (Cellucci and Peters, 2013: 1):

We are accountable to:

- The authors who submit their case for publication consideration;
- The reviewers who take the time and make the effort to evaluate the authors’ efforts;
- The students who study the published work;
- The organizations, persons, and places that served as the focus of the case study; and
- The Society for Care Research (SCR) members who have placed their trust in our ability.

And for both of the points—the need for permissions in field research and the signing of the publication agreement—they are required because they are simply the right thing to do. For this issue of JCS, the case Business Travel or Recreation (Brennan and Siagan, 2016) is an interesting one from the perspective of authenticity, as these authors completely constructed the conversations in the case from trial transcripts and other publicly available documents from the tax court.

Elements of case writing

This section of the workshop has been focused on our providing tools to help participants get started with case writing. They learned of the essential elements of a SCR case or critical incident, including “hooks,” permission from subjects, learning outcomes, case questions and answers and other content.

Participants then worked in groups to generate case ideas that appealed to them. Further, they were introduced to the “TOTAL CASE” acronym (Davis, Peters and Cellucci, 2014) that describes the essential case elements:

TOTAL CASE

The Letter	What it means
T = Tense	Review to ensure that you have written in past tense. The case happened in the past.
O = Objectivity	Review to ensure that the case is factual and objective, with unbiased writing. Proofread and look for opinionated statements. Edit or delete them.
T = Tone	Write in a more conversational tone. You are telling a true story.
A = Authenticity	Know that all cases and critical incidents must be real. No fiction.
L = Length	Consider how long the case is. Some of the more readable cases are between 7 and 15 pages in length. Authors with cases longer than 15 pages might consider putting some of the material in an appendix. Remember that the <i>Journal of Critical Incidents</i> only allows for three pages.
C = Characters	Remember that characters do provide depth and interest. While a character is not mandatory and some secondary research cases could not include characters, take a second look and see if character details may be found in public documents.
A = All-in-order	Consider the chronological order of a case and try not to “jump around” with the order of events. Reflection is fine, but jumps in time become confusing for a reader.
S = Suspense	Consider the tension or suspense in the real story. Is this

	an event, a decision to be made, a review of an event that is interesting? Do we as readers want to know what happens next?
E = Ending	Consider the ending as a closing ‘hook.’ Like the ‘hook’ in the case beginning, the ending should point to the readers what they should be thinking about, what issue requires evaluation; what decision might be recommended.

Several of the cases in this issue of JCS illustrate the essential elements of cases, as identified by TOTAL CASE. For example, the case of Ryan Braun’s Suspension (Shirley, 2016) was one that illustrated the need for objectivity in case writing. In this case, a top professional baseball player was suspended for using performance-enhancing drugs. Because most people have a negative view of drug abuse, it would have been easy for the author to paint Ryan Braun as a villain. However, the author was careful to present a balanced picture in the case.

The Disruptive Student Behavior in a College Classroom (Johnson and Tokle, 2016) case exemplified the importance of character development in case writing. Because this case was about conflict that took place between a student and a faculty member, knowing about the characters themselves helped provide depth and interest to the story.

Another example of a case that illustrated a great ending was the Air Zoo case (McCardle and Atkin, 2016). This case concluded with a paragraph that posed a series of issues that students should address using the quantitative data provided in the case. The case does an excellent job of pointing students in the right direction for the analysis but also providing them with a set of questions that the business manager was likely asking him/herself when faced with the problem.

The practice session

This section of the workshop was designed for the participants to work together to develop a hook. A hook is a few sentences at the beginning of the case to get the reader’s attention (Naumes and Naumes, 2012). An effective hook presents the protagonist, summarizes the problem/issue at hand, and also peaks the interest of the reader (Peters et al., 2012). The author’s taking the perspective of the reader may help the case researchers in this task, and also, having someone else read and offer feedback about the case beginning may aid in developing an interesting hook. In this issue of JCS, Crisis at a Local Barbership (Burnes, et al., 2016) offered a well-designed hook in which the owner of the store was running out of cash as he saw his revenues go down by 50% when a competitor opened up down the street. This hook did a good job of presenting vivid details, introducing the protagonist, and drawing in the reader with some dramatic elements.

Learning outcomes.

This final section of the workshop was built upon what transpired in the practice session when participants worked together to develop an effective hook. With a hook specified, the participants were to consider what the student learning outcomes should be. That is, in completing this assignment, students should be able to . . . We encouraged participants to be

mindful of the writing of these outcomes. Sample learning outcomes for a case about non-profit solicitations may be found in the SCR manuscript guidelines (see http://www.sfcr.org/docs/SCR_Manuscript_Guidelines_for_Authors.pdf). Pay close attention to the measurable verbs used, such as “identify,” “evaluate,” and “discuss.” Another example of appropriate verbs to use in the learning outcomes was in the Teakhoe case (Kusar and Mull, 2016). Their learning outcomes were as follows: 1) assess the external environment using a PEST analysis and Porter’s Five Forces; 2) appraise the opportunities and challenges of targeting unique wholesale market segments; 3) analyze the key resources and capabilities in a firm’s value chain and predict which resources and capabilities have the potential to be a source of sustainable competitive advantage; and 4) determine the most appropriate breadth of wholesale and product market segments in which a firm should compete and predict the wholesale and product market segments that would maximize firm performance. Given that SCR is motivated to support case research to help achieve excellence in case teaching, reviewers often give serious thought to learning outcomes.

Lessons Learned

Offering the case writers’ workshop has led to three lessons learned. First, we were greatly encouraged by the level of interest in case writing by faculty members. Many simply were unfamiliar with the vocabulary and processes used by SCR. Working with peers, many participants saw ample opportunities for publication. Second, we found great value in minimizing the number of slides and focusing on small group interaction. While potential authors needed to hear of SCR publication details, it was even more important for them to work with peers in identifying case ideas and working on learning outcomes and “hooks.” Finally, the presenters believed that the case writers’ workshop was a significant offering for SCR. To that end, a case writer’s per-meeting workshop will be held at the 2016 SCR Summer Workshop. We hope to see you there.

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Appendix A

Journal of Case Studies Timeline 2016-2017

JCS Vol 35 (1) and JCS Vol 35 (2)

- July 14-16** Workshop at University of Nebraska, Kearney
- Sept. 19** Deadline for submitting revised workshop case for publication consideration. Please submit the following to journalofcasestudies@gmail.com:
1. the author(s) information file (with author(s) information—name, affiliation, email, phone number, reviewing interests),
 2. the case,
 3. the teaching note,
 4. the memo that addresses workshop reviewer comments, and
 5. the author(s) verification that they are up-to-date on their SCR dues
- Oct. 3** If case is to be forwarded, editors forward cases, teaching notes, and memos to reviewers. If you submitted a case, you will be given at least one case to review.
- Nov. 4** Reviewers return recommendations and comments to journalofcasestudies@gmail.com.
- Nov. 11** Editors review recommendations and comments, and decide if submission continues in the review process. Editors forward their decision and reviewers' recommendations and comments to corresponding author.
- Jan. 20** Deadline for corresponding author to submit second revision, if appropriate. Please submit three files to journalofcasestudies@gmail.com (case, teaching note, and memo).
- Feb. 3** Editors forward submitted second revision to reviewers for second review, if appropriate.
- March 6** Reviewers send their final recommendations if they have received a second review to journalofcasestudies@gmail.com.
- March 31** Editors notify authors regarding their cases if cases experienced second review.
- April 24** **For Vol. 35.** Corresponding author emails final copy of accepted work to the editors. Please submit the following to journalofcasestudies@gmail.com:
- Summary, case, teaching note, signed publication agreement, and signed permission documents, if appropriate to the case

It is not required for case writers to attend the Summer Case Writers Workshop in order to submit their work for publication consideration. Submissions are accepted at any time during the year, and the review process will follow the JCS Timeline. The Journal is published twice a year (May and November). The journal is open access, has a ten month average time to publication, and has a 20 percent acceptance rate as noted in *Cabell's Directory of Publishing Opportunities*.

Cases published at www.sfcrcjs.org