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# CASE WRITING MATTERS

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## Introduction

This is the first issue of the *Journal of Case Studies*, but also this is its 30th volume. The 2012 publication has three changes from previous publications. The first is the change of name from *Annual Advances in Business Cases*, in which 29 volumes were published, to its new name, *Journal of Case Studies.* The second is the change of its being published once annually to twice annually, Number 1 in June and Number 2 in November. Last, the journal is published electronically.

We, the current editors (Cellucci and Peters) and graduate student assistant (Kerrigan), express appreciation for the efforts of Drs. Roy Cook, Executive Director, and Craig Davis, At-Large Director, Society for Case Research (SCR), and Dr. Biwu Yang, Technical Advisor, East Carolina University. Dr. Cook supported the move to e-publication and made certain that the transition from CD to e-publication went smoothly. Dr. Davis ensured we had the up-to-date SCR graphics and logo. Dr. Yang served as our technical advisor. His willingness to share his knowledge and guide us throughout the establishment of this journal as an e-publication was exemplary. Thank you.

We also salute the previous editors and assistants for their due diligence to have established a case journal worthy of students, instructors, authors, and reviewers. Our goal is to continue to earn this worthy status by our facilitating the publishing of interesting and relevant cases that allow for students to think, decide, and evaluate. Case writing matters.

## Defining a Case

Cases are real life, true stories. The story is told about a real event in a real organization in a real industry. William Stratton, Past President of Society for Case Research (2002) defines a case as "an authentic description of a real situation . . ." (as cited in Berger, Stratton, Thomas, and Cook, 2011, p. 8). Silverman and Welty (1994) define a case as "a real-life problem or dilemma which has no immediate, obvious, single or correct solution" (as cited in Millis and Cottell, 1998. p. 159). The key points about cases are that they are true; the event(s) *really* happened; and there has been research conducted that provides an organizational scenario. As Cook, Goulet, and Leonard (2006) note:

> the resultant case and the teaching note should be the result of a systematic study of the organization and its operating environment . . .

**Descriptive Cases**

Cases published by *Journal of Case Studies* are descriptive and decision cases. Descriptive cases present, simply put, a description. The students' responsibility is to analyze, assess, and evaluate the unit, organization, industry. Berger et al (2011) identify characteristics of description cases to include that students analyze to describe "what factors led to failure or success" (p. 10). While descriptive cases offer students opportunities for analysis and assessment, decision cases are more common. In this issue, we have three descriptive cases and nine decision cases.

In the first descriptive case, "ISU Credit Union Faces the Great Contraction of 2008-09," Tokle and Tokle describe how one credit union responded to the financial crisis. Students are asked to assess the strategic responses and evaluate how successful were the credit union board members' plans. Christman, in "The Case of the Burning Laptops," directs students to evaluate Sony's response to overheating batteries in laptops, including an ethical analysis of the response. Finally, Burton and Pope describe in "Winds of Change at Measurement Equipment Supply Company, Inc.," one firm's use of information technologies to improve operating efficiencies to try to remain viable in the competitive oil and gas industry. They ask students to assess the impact of technologies that create change in business processes as well as bring about change that affects competition.

**Decision Cases**

Decision cases allow for the students to serve as the decision makers; their responsibility is to think critically and recommend an action to address the situation effectively. For instance, Jaffke in "Beans N' Cream Coffeehouse . . . and More?" introduces an entrepreneurial business to the students; explains a situation in which the owners must decide whether or not to expand while, at the same time, meet customer needs. The students are asked to evaluate the firm and the market, and then, offer advice to the owners. What should they do? What course of action should they take, given the situation?

While each of the decision cases in this issue present people in various occupations and industries, they share in common that the events described allow for students to decide-- in a classroom environment where their proposals may be vetted. The beauty of case writing in the classroom setting is that students get to 'try out' their managerial ideas regarding 'real' events, but without the 'real' consequences they might experience in the workplace.

Thomas, in "Bully or Boss," asks the students to decide if an employee is a workplace bully; Joyner, Frantz, and Crane, in "A Consultant's Dream or Nightmare," puts students in the position of consultant, to prepare a report that identifies actions to help an organization become more

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viable; and McGovern in "An International Social-Marketing Strategy for a Non-Profit Organization: Determining the Path for continued Success" has the students serve as members of an executive board.

## The Case and the Instructor

Cases used by the instructor in the classroom may help bring the point of the lecture "home" to the students. Moreover, they help students improve their own decision-making skills, becoming aware of their own biases and learning how to recognize how their biases may influence their decision.

We have learned in our own educational and professional experiences that effective communication matters. When writing, for example, the phrase we remember from our high school English teachers is, "Make your assertions, support your assertions, and elaborate your discussion." That is, make your point; explain your point, and elaborate with examples to illustrate. In college skills texts (*e.g.,* Owens and Park, 2011; Mundsack et al., 2003) the emphasis is on the importance of students' ability to explain and elaborate to make certain their position/points are made as clearly and fully as possible.

By using cases in class, instructors can help students develop their analytic and problem solving skills. Cases can present complex situations where students have to sort through a plethora of information, pull out relevant fact and figures, and come up with a solution to the problem. This problem solving can be both qualitative and conceptual (in selecting an appropriate strategy, for example) or quantitative (like determining a break-even point for business).

Also, instructors' using cases in class may use them for elaboration. For example, instructors may illustrate how theories or models may be applied to help Board Members decide and strategize better regarding the future of a company. Perry and Whaley in "Leadership Crisis: How Can Circle 6 Survive," has the students define and apply life cycle approaches (such as Greiner's Growth Phase Model, Organizational Life Cycle, and Downward Cycle of Decline) to its Circle 6 firm. Students are then asked to offer advice to the leader of the firm to help it become more sustainable, if possible.

Finally, instructors using cases allow for in-class opportunities for students to learn how decision making works and what factors influence an individual's decision making. Stellern and Phipps in "Ending Homelessness in Kansas City," describe a city's effort to address homelessness effectively, and they put the students in the role of the Chair of the Homelessness Task Force. What would they propose? What is a city's obligation to the homeless?

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**Decision Making**

People make decisions every day, simple and complex. Drucker (1974) proposes that the "first managerial skill is . . . the making of effective decisions" (p. 465). Research confirms Drucker's (1974) proposal. That is, a manager's value lies in the quality of the decisions s/he makes (Kopeikina 2006; Sutton 2002; Peer and Rakich 1999). The decisions the case writers have asked students to make typically are complex, have strategic implications, and are the result of the search for an appropriate solution to the issues/problems, taking into account how the decision may affect others as well as taking into account how others are solving their issues/problems. A rational decision-making model may offer help in this decision-making process.

Adapted from Robbins (2000), there are five steps in the process:

- Identifying the problem correctly;
- Examining alternatives solutions to the problems;
- Identifying the best alternative;
- Implementing the chosen alternative; and
- Evaluating the decision.

While working through this process, students' recognition of their own biases may enable them to understand how such biases influence their decisions. Being aware may improve their ability to recommend a more effective alternative. For instance, with reference to Stellern and Phipps, how students answer the first question, "What is society's obligation to the homeless?" affects what alternatives they consider and what alternative they choose to recommendation to eliminate homelessness in Kansas City. And, in our opinion, provides opportunity for interesting and serious class discussion regarding the role of the Homelessness Task Force for Kansas City and to a larger degree, the role of managers and the ethics of responsibility.

## The Case and the Student

Students appreciate the use of case studies because cases allow students to apply their skills and knowledge to practical problems that they might encounter in their particular industry. While textbooks are helpful for teaching theories and frameworks, cases are often more interesting to students. Students may find that case studies with interesting stories help to make learning fun. Johnson and Kaupins in "Caught in the Act: Visiting Illicit Web Sites While on the Job," describe the dilemma of a supervisor who finds out that one of her employees has disabled a company firewall and has been viewing pornographic web sites on company time. Students are asked to put themselves in the position of the supervisor and decide on a course of disciplinary action while keeping in mind the potential legal ramifications for the company. While textbooks certainly provide guidelines about how to handle employee transgressions, this case brings to life a real world example that students might encounter.

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One of the biggest benefits of case studies is that they provide students with the opportunity to improve or sharpen their critical thinking skills. Cases do not simply ask for an answer, they demand that students explain their reasoning and thought process. While students may frequently be frustrated by the fact that important data may be incomplete or missing from a case, it is important to point out that this mirrors the dilemma of managers throughout most industries. Rarely do decision makers have all of the time, data and resources they would like when deciding on important issues for their organizations. In addition, case studies require that students utilize both qualitative and quantitative data. While stories may increase student interest and add significant value to cases, students must also be able to analyze quantitative data to recognize trends and other important points.

Case studies provide students with an opportunity to work in teams and help to promote stimulating discussions about what course of action should be taken in a particular case. Leonard and Hodge in "The Cat's Paw or Age Discrimination," describe the position of a Vice President of Human Resources who learns that a hospital pharmacist has overridden the hospital database and filled a prescription that could cause serious problems to a patient. This pharmacist has been warned for violating rules in the past, and the hospital must decide how to handle the pharmacist's latest transgression. To make matters even more complicated, the violation has been reported by a younger pharmacist meaning that the "Cat's Paw" Theory could come into play. This theory is related to employees who are considered part of a protected class. Students are asked to take the position of the pharmacy manager and human resources director to determine the appropriate course of action for management. Students will likely have differing views on how severely the pharmacist should be disciplined, and discussions may lead to spirited debate about the dangers of terminating an employee who is part of a protected class.

Some may complain that case studies require too much time and end up being too long for students to read (Yin, 1994). Leonard, Trusty and Cook in "It's All About Beliefs and Deeds," describe a Vice President of Human Resources who must decide how to handle an employee who is forcing her religious beliefs on others. Students must take the point of view of the Vice President of Human Resources and determine whether the employee in question is within her rights or whether her actions are discriminating against and harassing other workers. While this case examines a topic of utmost importance, the case study itself is only a few pages long and does not require an excessive amount of time to read.

Although case studies do allow students to apply their skills and knowledge to practical situations within their industry, it is important to note that students may not always exercise the best judgment when developing their line of reasoning. Students may make faulty assumptions along with other errors which lead to poor decisions and inappropriate courses of action. While students will undoubtedly be frustrated by failing at a case study, they will hopefully learn from

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their failures. In addition, case studies provide students with an environment where they will not be severely penalized for failing. There is little doubt that students would prefer to make their mistakes on a case study in the classroom as opposed to in the business world where they risk being reprimanded or punished.

## Conclusion

We encourage you to peruse the case abstracts. Read the synopsis—does the summary indicate an interesting case for your students? Do the learning objectives listed offer actions you want you students to master? Take a look at the case. Consider if you were a student, would the questions stimulate conversations among team members? Would it stimulate conversation and/or add value to your class lecture? Would it illustrate a theory, concept, model that you have been presenting? If the answers are "yes," then do we have a case for you!

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