Case Studies as a Teaching Tool in Management Education

Dominika Latusek
Kozminski University, Poland

A volume in the Advances in Business Strategy and Competitive Advantage (ABSCA) Book Series

IGI Global
DISSEMINATOR OF KNOWLEDGE
www.igi-global.com

Published in the United States of America by
IGI Global
Business Science Reference (an imprint of IGI Global)
701 E. Chocolate Avenue
Hershey PA, USA 17033
Tel: 717-533-8845
Fax: 717-533-8661
E-mail: cust@igi-global.com
Web site: http://www.igi-global.com

Library of Congress Cataloging-in-Publication Data

Names: Latusek-Jurczak, Dominika, 1981- editor.
Title: Case studies as a teaching tool in management education / Dominika Latusek, editor.
Description: Hershey : Business Science Reference, [2017] | Series: Advances in business strategy and competitive advantage | Includes bibliographical references and index.
Identifiers: LCCN 2016023649| ISBN 9781522507703 (hardcover) | ISBN 9781522507710 (ebook)
Subjects: LCSH: Management--Study and teaching.
Classification: LCC HD30.4 .C367 2017 | DDC 658.0071--dc23 LC record available at https://lccn.loc.gov/2016023649

This book is published in the IGI Global book series Advances in Business Strategy and Competitive Advantage (ABSCA) (ISSN: 2327-3429; eISSN: 2327-3437)

British Cataloguing in Publication Data
A Cataloguing in Publication record for this book is available from the British Library.

For electronic access to this publication, please contact: eresources@igi-global.com.

Chapter 7
Combining Case Teaching and Case Writing Creatively

Urs Müller
ESMT European School of Management and Technology, Germany

Martin Kupp
ESCP, France

ABSTRACT

In this chapter, the authors propose that not only do case teaching and case writing belong together, they can also support and inform each other in many ways. The authors highlight the fact that case teaching and case writing are not two separate and independent tasks, and therefore they should be combined continually in new and creative ways. Although it is obvious that it does not make a lot of sense to write cases without there being a teaching need, the authors argue that educators can start teaching the case even before writing it, and by doing so improve their writing. Many examples are given on how case teaching can be used for case writing, and vice versa.

INTRODUCTION

Case teaching and case writing are usually treated as two seemingly independent domains. This is equally true for case teaching and writing as a subject of academic research as well as for the practice of teaching and writing case studies. This separation seems logical, as teaching and writing are fairly different activities, not least due to the fact that some academics focus solely on teaching case studies (without ever writing them), whereas others become active in case writing only for scholarly purposes, without the intention of using the cases in class.

Contrary to this, the present book chapter proposes that not only do case teaching and case writing belong together, they can also support and inform each other in many ways. Although it might be more intuitive that writing one's own cases would support their teaching efforts, the authors argue that case teaching can support case writing in many ways. In this chapter, the authors highlight the fact that case teaching and case writing are not two separate and independent tasks, and therefore should be combined

DOI: 10.4018/978-1-5225-0770-3.ch007

continually in new and creative ways. Although it is obvious that it does not make a lot of sense to write cases without there being a teaching need, the authors argue that educators can start teaching the case even before writing it, and by doing so improve their writing.

The rest of this book chapter unfolds in the following sequence:

- The tradition of treating case teaching and case writing separately
- Why case teaching and case writing should be grouped together
- Using case teaching for case writing
- Using case writing for case teaching
- Conclusion

THE TRADITION OF TREATING CASE TEACHING AND WRITING SEPARATELY

Teaching with case studies and writing case studies have traditionally been treated as distinct and separate activities. Accordingly, the dominant way of thinking about the production and use of case studies is characterized by a rather disjunctive approach to these two domains, both in theory and practice. This can be observed and documented on the basis of at least two dimensions.

Workshops/Training

Traditionally, the art, craft, and science of case teaching and case writing have been developed and advanced through two separate forms of training. All of the leading institutions that offer courses on case studies as an educational tool in management education treat the two topics separately.

Harvard Business School

Harvard Business School has frequently been referred to as the pioneer of the case method being used as an educational instrument for management education (The Case Centre, n.d.). The output of case studies from Harvard Business Publishing has been consistently very high. Despite this productivity in case writing, Harvard Business Publishing only offers case teaching seminars (divided into two parts); recently, they have also begun offering an online course focused on teaching with case studies in online courses ("Teaching with Cases Online," Harvard Business Publishing, n.d.). Harvard Business Publishing did not advertise any case writing workshops in 2016.

The Case Centre

The Case Centre was founded in 1973 – initially under the name "The Case Clearing House of Great Britain and Ireland." From 1991 until 2013 it was known as "ecch European Case Clearing House" – a (European) counterbalance to the dominance of US institutions concerning business-related case studies. Following some early workshop experiments in the 1970s, The Case Centre has been offering case method training sessions continuously since 1992. These are offered both as open programs to faculty members from different institutions and as customized programs aiming only at specific institutions. The open enrollment case method workshops are clearly divided into "case teaching" and "case writing," despite the fact that several of the workshops are offered the same calendar week, thereby offering participants the opportunity to attend both training sessions. Case teaching workshops are usually scheduled before the case writing workshops (The Case Centre, n.d.).

Ivey Business School

Ivey Business School claims to be "the world's leader in case method training" and proclaims to have trained more than "15,000 participants in more than 60 countries." It regularly offers workshops – "Case Teaching and Writing Workshop" in 2016 – and thus seemingly combines case teaching and writing. A look at the program details, however, reveals that these four-day workshops are also divided into two parts of two days each: one on teaching with case studies and one on writing case studies. Both parts can also be booked individually, thus highlighting the logical independence and separation of the two topics (Ivey Business School, n.d.).

In essence, case teaching and case writing are being taught in different courses – at least when looking at the leading institutions for such training sessions. This phenomenon is also apparent when looking at the formal organization of faculty development at many universities / schools. Quite frequently, case teaching skills are developed and passed on through formal induction training sessions (esp. for new teaching faculty) and through mentoring programs offered by senior faculty or specialized departments. Case writing skills, however, are usually developed through case study review boards, which offer guidance and possibly even have the formal power to decide for or against the inclusion of a case study in the institution's case study collection.

Books and Articles

The most successful and most widely used books and articles about the case study method focus solely on either of the two activities. This is evident from the most important monographs of two of the world's leading institutions with respect to the use and production of case studies – Harvard and Ivey.

- Andersen and Schiano (2014) explicitly focuses on case teaching and makes only two short references to case writing, both of them in the context of Chapter 9 on "Fostering Case Teaching at the School Level."
- Mauffette-Leenders, Erskine, and Leenders have produced an almost canonical series of three books – *Learning with Cases* (Mauffette-Leenders, Erskine, & Leenders, 2005), *Teaching with Cases* (Erskine, Leenders, & Mauffette-Leenders, 2011), and *Writing Cases* (Leenders, Mauffette-Leenders, & Erskine, 2010) – all of which were published by the Richard Ivey School of Business. As can be deduced from the title of the books, they focus clearly on either learning, teaching, or writing. There is, however, a reference to the need for a teaching test when writing cases (Leenders et al., 2010, pp. 144–151).

Even when textbooks or articles cover both domains of teaching and writing case studies, they tend to clearly separate the activities into distinct chapters or sections. For example:

- Heath (2015) divides his book about *Teaching and Writing Case Studies* into three parts: one of which is dedicated to teaching with cases, the second to writing case studies, and the third part to exercises.
- Barnes, Christensen, and Hansen (1994) include in their book *Teaching and the Case Method* a short chapter on "Next Steps: Writing Cases for Your Own Teaching Seminars" (pp. 285–295), but this chapter does not try to combine – or show the relation between – case teaching and case writing. Rather, the chapter is a very short introduction to the basics of case writing for beginners.
- Vega (2013) dedicates an entire module of her book *The Case Writing Workbook: A Self-Guided Workshop* to the topic of "Teaching with Cases" (Module 8, pp. 217–247). However, the module assumes that the writing of the case study and the teaching note is already finished before teaching the case in class: "Once a case has reached its target – your students – the next step is figuring out how to maximize student learning" (p. 217).

Despite the fact that this book chapter argues differently, there are indeed some good reasons for the prevailing tradition of separating the two domains.

Sequential Logic of Learning and Presenting the Skills of Case Teaching and Writing

Education programs – including those that try to teach case teaching or case writing – as well as books and articles need to have a certain structure. This structure is traditionally sequential (in workshop: sequential in time; in books or articles: sequential in the presentation of the text) and therefore usually requires separating or sequencing topics that are connected or related. As case writing usually aims at the production of material for teaching, case teaching is usually the starting point, as a minimum level of reflection about teaching can easily be considered a prerequisite for the production of effective and successful case studies.

Writing and Teaching are Different Activities

Even though the skills and competencies required in both fields in order to reach excellence overlap – especially as both require a deep understanding of the educational process – writing and teaching are nevertheless logically separate activities. Case teaching is (usually) an inherently social activity that happens in real time and, quite frequently, within a well-defined 60- to 90-minute timeframe. In contrast, great case studies could potentially be written in solitude (and they are usually written individually, even when produced by several authors), with breaks taken over a long period of time, and in several loops to improve the case over time.

Skills Development and Improvement

Writing and teaching require different skills and are therefore typically developed using different methods. Both activities benefit significantly from the learning of experienced colleagues, feedback, and – most importantly – from reflecting on experiences. But in order to excel in teaching, instructors might want to seek inspiration from fields such as (improvisational) theater (esp. regarding voice and body language), coaching (esp. listening skills, probing), and moderating. Whereas case authors would most likely profit from learning about literature (narrative structure, levels of fictionalization, rhetoric, styles, etc.).

In contrast to this dominant tradition of separating the two domains, the authors of this book chapter nonetheless argue that there are good reasons to think about case teaching and case writing as being connected activities. In the following, the authors first present practical and conceptual reasons for linking case teaching and writing. The potential benefits of linking the two activities are then illustrated in the two subsequent parts of this chapter with several examples from practice.

WHY CASE TEACHING AND CASE WRITING SHOULD BE GROUPED TOGETHER

Despite the tradition of treating case teaching and case writing separately, the authors believe that there is a large group of people that could benefit significantly from combining both domains. Just think, for example, about educators working at institutions that do not have a longstanding tradition of using and producing case studies. Even though teachers at such schools might be deeply convinced by the adequateness and effectiveness of the case method for management education, they might face cultural, financial, or organizational barriers against using cases, even in their own courses / classes. The most prominent ones are given below.

Cultural Challenges

These challenges frequently result from most, or all, other educators at large institutions using other teaching methods, which typically are still dominated by lectures, unfortunately. At these institutions, students might simply not be used to, or willing to, prepare and/or to openly discuss cases. For example, they might not dare to speak up in class, especially not with controversial or even confrontational comments in large classes.

Financial Challenges

These challenges often arise at large, public colleges / universities and in bachelor / undergraduate education programs. Here, the sheer number of students could possibly lead to enormous costs that make the use of cases from other institutions unbearable (even though there is a growing body of distributors offering cases free of charge). Making the students pay for the licenses (as required by many case distributors) might also be impossible when operating in contexts where such costs are not affordable for large numbers of students; this is certainly rather difficult, if not completely impracticable, regarding the distribution of cases in the class, especially for the subsequent cases in a case series (cases B, C…).

Organizational Challenges

These result from difficulties in sourcing cases from the established distributors (e.g., when no organizational membership of – or recognition by – any of the large distributors has been established yet).

Sometimes it is also difficult simply to make cases available to students due to the protection offered by copyrights. Most frequently, cases are distributed as paper copies or as electronic copies via e-learning platforms. However, if no such established route for the distribution of cases exists, educators might be forced to refrain from using cases at all.

Especially in situations where the use of cases is made difficult due to financial restrictions, the production of one's own cases could be an adequate method – or possibly even the only one – for introducing case teaching as an educational approach. Educators in such situations might be driven to produce case material for use in their own classes.

But above and beyond these restrictions, there are also upsides to grouping case teaching and case writing. This even applies to teachers working at institutions that regularly use case studies as a didactical approach. While working with many educators around the world in case writing and case teaching workshops, the authors of this chapter have heard over and over again about the possible benefits of combining case teaching and writing by teaching one's own cases.

The relation between both domains can also be observed on the basis of anecdotal evidence that many, if not most, of the most successful case studies have been produced by authors who were simultaneously recognized by their institutions as being great teachers – or vice versa. In this sense, the production and use of case studies seems to be linked, and they should therefore be thought of as being related. Thinking about case teaching and case writing together is a little bit like combining hardware and software. Although one can obviously just optimize the one or the other, there are benefits to optimizing them jointly.

But while acknowledging the upsides of combining case teaching and writing, many instructors also mentioned to the authors of this chapter the difficulties of actually using case writing to improve case teaching, or the other way around, in a more systematic way. In the two following sections of this book chapter, the authors lay out a framework of how to use case teaching to improve case writing and, vice versa, of how to use case writing to improve case teaching. The authors believe that management teachers, business teachers, trainers, and coaches who adopt some of the following recommendations will be able to simultaneously develop a better and faster way to start (and complete) the case writing process and to significantly improve their own case teaching.

USING CASE TEACHING FOR CASE WRITING

Although books and articles on case writing are very explicit about where to get ideas and leads for case studies, they focus a lot less on how to develop and improve the initial idea for a case study in a fast and effective manner. This is exactly where case teaching comes into play. Case teaching can be a very effective way to quickly test ideas, get feedback, and improve the case – or possibly to even dismiss initial case leads early on before unnecessarily investing a lot of resources into an idea that will not yield great results.

By combining case teaching and case writing, a case can become a living document. The more it is taught, the more perspective acquired. The educator can improve the case over time or add a case sequel (a case B) as time passes, thereby leading to new insights. Different versions of the case study can be tested in class to gain a better understanding of the dynamics of teaching the case. Therefore, in the following sections, four main ideas are focused on:

1. How to use case teaching for collecting material for case writing (with research in mind)
2. How to use case ideas in teaching
3. What to test for and what insights can be gained
4. When to test case ideas and how to choose the right environment

How to Use Case Teaching for Collecting Material for Case Writing (with Research in Mind)

A non-obvious – but perhaps the most impactful – way to leverage case teaching for case writing is to use case-based and participant-centered teaching methods to generate leads about interesting stories that can be used for case teaching, and subsequently for case writing. For example, this could be done by asking students to write up relevant decisions from their own (professional) experiences and then use them in class. One of the authors of this book chapter has asked hundreds of MBA students and executives to write up the most difficult ethical decisions that they have faced and to submit them before the start of a business ethics course. These cases were carefully read, grouped into subject areas, and discussed in class when appropriate. The idea and story behind the case study "Anna Frisch at Aesch AG: Initiating lateral change" (Müller & Schäfer, 2010), which won the Case Award of The Case Centre in 2014 in the category HR Management / Organizational Behavior, was generated using an EMBA student's essay in a change management course. Accordingly, the initial advice is to systematically leverage as many teaching opportunities as possible for the generation of as many case leads as possible.

Obviously, this is highly applicable to courses offered for executives, or MBA students with at least a certain level of professional experience. However, dependent upon the subject / discipline, this could even be a feasible approach for undergraduate classes. For example, teachers could ask students to present difficulties in their group work when teaching organizational behavior. Case teaching could be combined with active learning methods by first asking the students to search the news for current developments and to turn them into small cases that are then subsequently discussed in class. For example, one of the authors of this book chapter incorporated a case writing element in the students' evaluations. Students were asked to write a short case about a company of their choice. At the end of the case, the students had to add six to eight questions about the case that related to the strategic frameworks and theory of the class, for example "What kind of generic strategy is XY using?" Then they had to answer these questions using content from the strategy class. This way, students applied the concepts and frameworks of the class to a topic of their choice, thereby preparing themselves for the exam, which follows the same logic and is case-based. Obviously, copyrights and authorship need to be observed, but by building such elements into teaching, a teacher can clearly generate many interesting case leads.

How to Use Case Ideas in Teaching

Once an educator has found the inspiration for a case study – by using students / participants as described above, or by just stumbling upon it in newspapers, conversations, social media, through own observations, or through requests from companies, etc. – the question of whether to use this "case lead" (Abell, 1997/2003) should mainly depend upon on two aspects. On the one hand, the case lead needs to fit the educational needs of the course. On the other hand, the efforts in writing this particular case study need to be balanced with the benefits. Obviously, writing a case study is resource-intensive, as one has to research the topic, conduct desk research, potentially conduct field interviews, develop an outline, write the first draft, and one day finalize the case, the teaching note, and then even get permission from the company and protagonist(s) described in the case. This is quite a bit of work, and there are many unknowns, among others:

- Is this an interesting company from a student perspective?
- Is the industry interesting?
- Will students engage, that is, is the issue controversial enough to stimulate a lively debate in class?
- Is the "solution" sufficiently complex to justify an extended discussion of this topic?
- Are there enough questions in the case?

It would be useful to try to eliminate as many of these unknowns as possible, as fast as possible, and with as few resources as possible. This is where teaching comes into play, because the classroom is, of course, the most natural and realistic place to test the idea. Following are some ideas on how to rapidly test the initial case ideas very early in the process, and for a rather low cost.

Using a Newspaper Article, Video, Blog, or Other Publicly Available Source

The first possibility for testing the case idea is to use an existing, publicly available source, such as a newspaper article, a short video or documentary, a blog entry, or the like. Depending on the initial inspiration, a quick search of archives, webpages, social media, etc., for some background information on the case should suffice. If someone mentions an interesting story, the chances are high that something can be found on the internet that relates to this story. This often does not take longer than an hour or two. Sometimes an article can be found that does not require any editing. For example, the idea for the case study "'Do you really think we are so stupid?' A letter to the CEO of Deutsche Telekom" (Korotov, Müller, & Schäfer, 2009) resulted from an article quoting the entire letter; a quick test of this article in the class environment confirmed the viability of the case lead for a great case discussion.

Alternatively, active learning activities could be used, whereby students prepare a certain case by actively searching for information themselves before coming to the next class session, or a sanitized version could be used if the information is received in confidence.

Independent from the material provided as input, the most important part is to think through the session and to come up with the right questions to open the discussion and lead through the session. This will provide early feedback about whether it is worth investing the necessary time, effort, and possibly even resources into the research for the case study.

By the way, teaching, in this context, is to be understood in a very broad sense, and could even include exams or other types of assignments for students. The authors have had good experiences testing students' reactions to managerial dilemmas by presenting them in exams as the basis for essays. Depending on the intensity of the discussion and the breadth of different proposals, it can be easily and quickly surmised whether the case lead really works in an educational setting. (See also Leenders et al., 2010, p. 146: "Popular options in case schools are to use a new case first as an exam, report, student presentation or case competition.")

Presentation

With a little more work, a short (PowerPoint) presentation, that is, a few slides, could be generated. Instead of using the original sources, a very short presentation (in the authors' experience, this does not need to be longer than four or five pages) could be created that presents the key fact of the story, already structured in a way that will help in starting and moderating a discussion. This short presentation (as opposed to just an article, etc.) allows the instructor to make use of visual materials (pictures, organizational charts, tables with data, process presentations, etc.) – various elements to be consider as possible exhibits for a final case study. The presentation should have a very similar structure to a typical case study, with one page dedicated to the problem, one page on the background of the company, one on the industry or wider context, and a final page to either flesh out options or to serve as a kind of wrap-up. Depending on the topic, more details on numbers and background can be offered. As with a case study, the idea is to create a level playing field for the discussion. Of course, although this will take longer than if the original source(s) were presented, in the authors' experience, the instructor will be able to create a good presentation in only a few hours – a lot faster than a case study.

The benefits of using a presentation compared to just using the original sources are that the case story can be shaped to fit the educational objectives. Existing articles frequently present the case lead in ways that are not optimal for teaching purposes:

- They are frequently written from a (seemingly) objective, independent perspective, whereas cases usually present the issue from the perspective of one clearly identified individual.
- They frequently present the results after the decision, that is, the events and consequences of the decisions that were made by the main actors.
- They frequently contain some of the reflections and considerations that educators usually want to bring up during the discussion.

Mini-Caselets

Another format to test case ideas in the classroom is the so-called mini-caselet. The main idea is to write up a very rough and brief version of the case idea. Often, mini-caselets focus on the problem description and just offer some basic background information. The level of detail is rather high, and authors do not provide a lot of data or exhibits. Again, the idea is to just deliver the basics to ensure an informed discussion, but things such as quotes, various perspectives, and detailed figures are not added. By the way, such mini-caselets are frequently used to present the case study idea and possible flow to the companies and/or individuals that are intended to be covered in the final case study. In this way, permission can be obtained to prevent a significant loss of time and effort due to a late-stage refusal by the case protagonist or organization.

In the past, the authors of this book chapter have sometimes even used all three formats described above for one single case idea over time (e.g., for the case "Deutsche Bahn AG: The heartless train conductor," Schäfer & Müller, 2015). The first test was done just using a newspaper article. For the next teaching opportunity, with a bit of additional background information, the authors transformed the article into a short presentation and then drafted the first mini-caselet. This way, the authors could test the idea several times in different formats to gain insights into how students react and engage with the material. Some of the more prominent issues to be aware of are presented below.

What to Test for and What Insights Can Be Gained

An instructor knows how to create something such as a minimal viable case study to test ideas fairly early on in class. But testing obviously only makes sense if there is a clear objective about what to test. Although an instructor might already feel very confident about how to use the case and how participants will react, the authors believe that there are at least five good reasons to go down the testing route. Testing will help instructors to check: (i) what additional information is needed, (ii) whether the topic is controversial and engaging, (iii) whether the right perspective and protagonist have been chosen, (iv) whether the immediate issue works, (v) what level of breadth and depth is needed. Last but not least (vi) testing will provide a lot of data that might be needed for writing up the teaching note.

What Additional Information is Needed? Is it Already Complete?

The most obvious test is to check what additional information is needed. Especially in cases where testing involves using a journal article or a few PowerPoint slides, the instructor will quickly realize where the discussion might get stuck or where students will ask for additional information to be able to answer questions, to formulate a recommendation, or to make a decision. A situation in which students ask for additional information is actually a great opportunity. Even if the information is not readily at hand (e.g., because instructors have not yet started to do interviews and dig deeper), an instructor can use this moment in class to start building hypotheses with the students. So, if someone asks for additional information, the instructor can ask: "What do you assume?" or "Does anyone know the answer?" Case study teaching offers this opportunity to actually develop, discuss, and challenge the different assumptions in the classroom. Moreover, students will see that their classmates might have very different assumptions. Although this can be a very good moment in the discussion, the instructor should nevertheless immediately take a mental note and decide after the class whether it would be useful to add this kind of information and, of course, whether it is possible to get this information.

Is the Topic Controversial and Engaging?

Already when handing out a newspaper article or when starting to tell a story – for example, with the help of a few (PowerPoint) slides – the instructor will immediately get a sense of whether the topic engages the audience. Can people easily relate to the case? Do they engage? Do they understand the situation and the context? Are they excited to talk about the specific case and the topic in general? But the instructor can go even further and test, for example, what kind of opening question triggers the most controversial debate, and whether bringing a sample of the product helps people engage with the topic. The instructor will also experience if there is some kind of natural way in which the discussion can unfold. If so, this will provide an idea about what kind of information needs to be added to make it easier for participants to follow this path.

Has the Most Promising Perspective / Protagonist been Chosen?

Sometimes a case can be written from the perspectives of different people (e.g., headquarters versus business unit perspective; marketing versus finance perspective; company versus stakeholder perspective; more senior versus less senior protagonist). Presenting different perspectives in different courses will give a potential case writer a good feeling about which perspective is leading to the most fruitful discussions. A good example is the case study "Vodafone in Egypt," set during the revolution in 2011 (Müller & Pandit, 2014). A choice had to be made between the perspective of the local management in Egypt and the perspective of the Vodafone group headquarters. Each perspective would lead to a different discussion. Using the case in class, the author realized that the local perspective was much more engaging and controversial.

Does the Immediate Issue Work?

One of the trickiest things about writing engaging case studies is finding the appropriate immediate issue. The immediate issue is the hook into the case that is supposed to engage the reader. In the discussion, this issue leads to the more fundamental (sometimes also called: underlying) issue, which is more closely linked to the teaching objectives. What the authors of this chapter have experienced – but also learned from multiple conversations during case writing workshops – is that the fundamental issue often comes naturally. Examples are when one reads something about a company that has found a new way to grow in a highly competitive commodity market, or somebody tells a story about an interesting pricing strategy. Both growth in commodity markets as well as pricing strategy are fundamental issues. Fundamental issues are often so big that participants need a little bit of help getting into the case study. This is the objective of the immediate issue. It should lead the reader into the case with a much smaller, more concrete issue, such as the question about whether to hire externally for the new sales executive position or promote an internal sales manager. These kinds of questions are more engaging, as they require an immediate action or decision and ultimately lead to the more fundamental issue as the discussion unfolds in class. Immediate issues are also much closer to the managerial reality that the students are likely going to face during their professional careers.

But for each fundamental issue, there are, of course, many different possible immediate problems to choose from. It is therefore advisable to think of at least four or five different immediate issues, list them, and write matching opening questions for them. In only one session, an instructor can try to test two or three of them by quickly discussing them at the start of the session and testing for levels of controversy, engagement, and emotions.

For the case study "Team Wikispeed: Developing hardware the software way" (Kupp, Dahlander, & Morrow, 2013), which is about the fundamental issue of organizing agile product development, there were several potential immediate issues. These were potential opening questions:

- Should Joe Justice allow the team to set its own agenda?
- Should Joe Justice cut and weld the existing axle or press for the development of a proprietary axle?
- How could Joe Justice improve the performance of his team?

By testing these questions in class, it became clear that question one was too closely linked with the fundamental issue of agile product development, and question three was too broad and unspecific, thereby making participants uneasy and slowing the discussion. Question two worked best: It was specific enough and it was controversial, as it offered two options and split the class.

Breadth and Depth

A classic beginner's mistake in case writing is to overload the teaching objectives; the authors of this book chapter have seen countless case studies written by rather inexperienced case authors in several different case writing competitions – one of the most frequent problems is that many cases try to kill too many birds with one stone. Instead of clearly centering on sales management, a case might, for example, simultaneously include strategic, cultural, change, and leadership issues. In very specific situations, this might be adequate (esp. when intentionally making a case complex in the analytical dimension of the case "difficulty cube" of Mauffette-Leenders et al. (2005, p. 12)). However, in most situations, case authors will quickly realize that cases which have too many learning objectives, cover too much content, and/or address too many concepts, theories, or subjects will make the case discussion in class significantly less effective. Case authors should therefore test the necessary level of concentration, for example by eliminating aspects in iterations after each test use in class. (This can even be done after publishing a initial version of the case, e.g. by adding an abridged version of the case, as is frequently done by all major case distributors.)

Conversely, some (but usually much fewer) cases are written with a scope that is too narrow. They focus so clearly on one single, rather specific issue that the first use of the case in class quickly reveals that the case does not have the necessary breadth to allow it to be used for an entire class / session. When faced with a fading discussion in the middle of the session, the case author might want to consider including (successively) more facets to the case. Alternatively, it can be most appropriate to keep the case focused – but then the author should advise other educators in the teaching note about additional exercises, discussion points, etc., that would complement the short discussion of such a highly focused case.

Collecting Data for the Teaching Note

The last reason why it is useful to test case ideas by teaching them is that a lot of data and ideas will be generated. Such data and ideas will be very helpful when writing the teaching note. Although the main objective in writing a teaching note is to put the case into a research or teaching field context, the second objective is to help potential users (other teachers) of the case study prepare and to create an engaging atmosphere when using the case. To achieve these objectives, it is very helpful to: state the actual reactions of participants who were exposed to the case study (so that other educators can anticipate the main points of the discussion); offer guidance on board layouts; give information about what kinds of topics typically come up during the case discussion; and also offer advice on how to deal with typical questions or requests of participants. The more detailed this information is, the better.

The authors of this book chapter have had the experience (both by observing themselves as well as many other case authors) that once the case study is actually finished, there is the impulse to publish it as soon as possible. But teaching a case study (which is a requirement of all major case distributors, such as Harvard Business Publishing, The Case Centre, and Ivey) might take some time and therefore might delay the publication. It is therefore great if there is already a lot of data from tests that can be use for the teaching note.

When to Test Case Ideas and How to Choose the Right Environment

By now, some of the benefits of using case teaching to develop high-quality case material should be clear. But questions remain: When and how to test case ideas? For example, how can one choose the right environment? And what should be done to get the most out of these tests?

First of all, there is the question of timing. From experience (own experience as well as from observing, talking to, and coaching many other educators), the authors of this book chapter fundamentally believe that the earlier the ideas can be tested, the better. In the section above, a series of different ways to test ideas was presented. These ideas range from using secondary materials such as newspaper articles to writing mini-caselets. Depending on what needs to be tested, choose the format that can be used as early as possible. This will help prevent time and resources from being lost. The feedback will help in better understanding class dynamics and allow for adjustments early on in the process.

Of course, the earlier the testing is started, the less that the teaching process and outcome can be predicted and controlled. It is therefore important for instructors to choose the right environment and to prepare both themselves as well as the participants for the testing. The best preparation for educators is for them to be very clear about what they want to test and then choose the right audience. Often, the authors of this chapter hear educators say that it is better to test with undergraduates than, for example, graduate students or even executives. Although this sounds rather intuitive, it is more important to be clear about what needs to be tested. If, for example, the instructor wants to test for breath and depth or relevance, a more mature audience might be the better testing ground. Also, when testing whether the topic is engaging and the plan is to ultimately use the case in executive education, testing it with undergraduates might not provide the insights sought for. So when looking for the right environment to test case ideas, be clear about what needs to be tested for and what audience is the right one for helping to answer this question.

If what educators test for drives who they test it with, it becomes very important to think about how to create a safe teaching and testing environment. From research, it is known that psychological safety is a shared belief that the team is safe for interpersonal risk taking (Edmondson, 1999). In a psychologically safe environment, team members feel accepted and respected. So, unless that which is being tested only works when participants do not know that they are being tested, the advice is to be open with participants about it as well as about what the goal is.

Whenever possible, even beforehand, educators should explain to participants why certain materials are being used. Sometimes this is not possible, as it would spoil the results of the test. But it is still advisable to explain the approach at the end of the test, for example the session, and to leave enough time for everyone to discuss what they have observed.

It might also be a good idea to have a short discussion in which the educator works with a group of participants – for example at the end of a course or the end of a day seminar with executives – to conduct a short feedback session, not only about the actual learning but also the process and the materials used. By explicitly exploring the learning process as well, the educator will gain additional insights into the teaching's effectiveness and how it relates to the materials and processes.

At many institutions, educators can also find a broad range of low(er) risk / low(er) visibility teaching opportunities that – dependent upon the testing idea mentioned above – could work well for some testing. For example, this could be, among other things:

- Conferences
- Marketing events/roadshows
- Alumni meetings
- Open houses
- Class sessions outside of the normal curriculum (e.g., voluntary classes)
- Electives
- Internal meetings dedicated to educational purposes

USING CASE WRITING FOR CASE TEACHING

Having shown how (prospective) case writers can use case teaching to improve their case writing, the authors argue in this section that – conversely – the process of writing case studies can increase an educator's inventory of teaching skills and ultimately lead to an improvement in teaching capabilities. The authors believe that professors in the domain of business administration and management as well as business teachers, trainers, and coaches can significantly improve their abilities to create effective and truly participant-centered learning when engaging in case writing (or similar activities). Some of the improvement effects on teaching from case writing will appear almost automatically; a few others will only result from a deliberate, intentional, and reflective approach to case writing.

Case writing will almost inevitably have an improvement effect on teaching, regardless of the previous quality of the educator's teaching or writing. Educators will typically realize that using their own case studies:

- Enhances their own status as a teacher in the class. They will be seen as someone who has connections to managers, who is interested in the teaching process, who is looking for their own way of teaching, etc. (see also Andersen & Schiano, 2014, p. 234: "[I]nstructors, having produced a few of the cases for a course, gain students' respect");
- Gives them self-confidence that will typically be projected to the classes taught; this is sometimes particularly helpful for less-experienced teachers and is significantly driven by the fact that educators will usually know much more about a case situation than what is presented in the case or that could possibly be know about a case written by someone else;
- and allows them (legitimately) to discuss their own work in class with pride.

But above and beyond these effects, there are multiple benefits that can be reaped from intentionally leveraging case writing to improve one's own case teaching. In the following, the authors present four important benefits for case teaching that can be gained from case writing:

- Identifying educational needs
- Structuring entire courses
- Teaching truly relevant content
- Bringing research into the classroom

Identifying Educational Needs

Derek Abell (1997/2003) convincingly argued that good case studies need to combine two things:

- Successful case studies (here understood as case studies that achieve their educational objective) are always more than just a great story – but they do need to have an interesting lead in their core.
- At the same time, cases need to address a need, that is, a (relevant!) educational objective that can be brought to the class through the discussion of the case study.

Following this "leads-needs-based philosophy" to case writing, case authors should only start writing a case study once a truly interesting story (lead) coincides with a clear educational demand and objective (need). Doing so will help to improve the case author's teaching by filling an educational need.

Great case teachers will typically have several educational needs that are not yet being adequately addressed in their own courses and sessions, and for which no case study exists so far. This might possibly even be an expression of their quality as teachers: their constant desire to tailor entire courses and all individual sessions to the specific needs of the different classes / groups they teach. The more a teacher tries to adapt the content to the developmental needs of the student / participant groups, the more they face situations in which no adequate (or at least no perfectly matching) amount of teaching material will be readily available.

This can sometimes be true for the macro level, that is, a lack of teaching materials that cover an entire subject / topic, a specific theory or framework, or an entire business area. Such situations usually arise for very recent developments, such as the emergence of new industries, new concepts in management thinking, changes in economic realities around the globe, new important companies, etc.

More frequently, however, educators will lack the educational materials for a required combination of topics, level of seniority, age, function, industry, geography, gender, educational background, etc. For example, there are many great cases about corruption, but is there that one case that is needed for the group of mostly female banking undergraduate-level students in Nigeria, or for the group of experienced, mostly male executives from the IT industry in France? There is no single optimal case study to cover an entire area for all possible target groups. And sometimes teachers also face the situation that they just need to bring a certain mix of cases into the class. If the class is diverse, the following questions need to be asked: Were male and female protagonists included? Were large multinationals as well as small owner-operated businesses mentioned? Were cases from several geographic regions included? Given the traditional dominance of case studies from US-based business schools, there is a high probability that educators will not be able to cover everything needed to really target the audience using the existing materials.

Without a very clear teaching need, no case study should be written. Case writing to fill such teaching needs is a great expression of the educator's participant-centered learning philosophy, and it will truly help them to shape the entire educational process around learning objectives and developmental goals. This focus on what the classes / participant groups truly need should be the starting point of any teaching. But this is frequently forgotten, and case teaching (or the preparation of one's own teaching materials) can help all educators to regain and maintain this focus, which ultimately makes the teaching better, that is, more suited for the participants. As in many other domains, in case-based teaching, less is usually more – or at least better!

(Potential) case authors should thus be advised to deeply, honestly, and self-critically assess and evaluate the educational needs – both the educational needs of the students / participants in their courses and sessions as well as the underlying educational need, that is, the reason to develop one's own case study. As a result, the case author's teaching and writing should begin to improve.

Structuring Entire Courses

As explained above, increased attention given to the educational needs and objectives for the case while writing it can improve an educator's (case) teaching. But sometimes an educator might not even be aware of an educational need until faced with a case lead. Just as an example: One of the authors of this book chapter taught business ethics courses for many years, many of which required a very clear focus due to the low number of sessions. Given the case-based teaching methodology and a strong emphasis on managerial issues (i.e., issues that managers will likely face in their professional lives and will need to – if not be forced to – decide upon), the course traditionally did not include much content concerning justice and inequality. Such issues are highly relevant and lead to immediate discussions in the class, but they are often unrelated to the realities and decision-making of individual managers, as many such topics fall into the domain of politics and the design of economic systems at large. However, at some point, a case lead surfaced from an executive education participant. A managing director in a large investment bank reported on a change in the bonus system that was forced upon him. Instead of him being given a bonus and his 15 team members being given a bonus pool to distribute, the executive was now only given one bonus pool, out of which he was expected (and allowed) to take as much for himself as he wanted. Simultaneously, the overall amount of money available for distribution decreased dramatically due to problems in other parts of the bank. This case lead not only revealed (or rather: generated) a real case need, but also a structural hole in the previous course designs. Writing a case study about this situation then allowed for a restructuring and clearly improved the entire course design.

Teaching Truly Relevant Content

In addition to the focus on educational needs (see above), writing case studies helps educators to center their own teaching around truly relevant content. Writing case studies frequently requires intense collaboration with the protagonist(s), other representatives from the companies portrayed, and possibly other experts. Carefully listening to what these people from practice have to say can significantly increase the relevance of the teaching content in at least two different ways.

Relevant Problems

Educators (especially when they are not in constant interaction with practitioners) sometimes risk losing connection with managerial reality and teaching content that is intellectually interesting, inspiring, and related to rigorous academic research, but also possibly largely irrelevant for practice. This can be avoided by writing case studies: Great cases do not depict issues that are just interesting to the case author but that are also truly puzzling, difficult, and critical for the individuals described within the case study. If a situation / decision was not truly relevant to a manager in reality, the subject is usually not worth writing a case study about. Frequently, the starting point of great case studies is to carefully listen to people from practice and ask them for their issues, problems, difficulties, mistakes, or challenges.

If any of these relate to concepts, theories, and an educational need, educators can start writing a case study. In this way, it can be ensured that the case study deals with a truly relevant problem: If anyone has experienced such a challenge already, the students / participants might face similar issues as well after finishing their education.

To illustrate this point with an example: In 2012, Florian Nehm, the Head of Corporate Responsibility at the large European media house Axel Springer, approached one of the authors of this book chapter and asked how he would assess Axel Springer's level of responsibility for the conflict minerals in digital reading devices that customers use to access the information and entertainment produced by Axel Springer. It seemed obvious that this "electronic paper" was somehow different from the case of the traditional newspaper. Axel Springer had taken responsibility to clean up the sourcing of the traditional newspaper, but should the same apply to the problems related to conflict minerals in smartphones and tablets? This conversation and question not only kicked-off the production of the case study "Axel Springer and the quest for the boundaries of corporate responsibility" (Hofman, Müller, & Bhattacharya, 2014), but also the development of a new teaching session focused on the question about if and where companies should draw the line of responsibility, and how CSR departments should deal with such cases.

Relevant Concepts

Closely related to the idea of focusing on relevant issues through the production of case studies is for the educator to center the content of their teaching on the tools, frameworks, concepts, theories, etc., that are truly helpful and applicable for individuals dealing with such problems. Here again, the people described in the case study come into play. When preparing a case study, case authors should start to test ideas concerning the possible teaching uses of a case study. Which concepts or tools would have helped the case protagonist(s) to adequately deal – if not even "solve" – the issue? Case authors do not usually need to receive permission for the teaching note from the organizations and individuals described in the case (at least as long as the teaching note does not contain any additional information that was obtained from them and that is not in the public domain). So, theoretically, case authors do not need to discuss the educational content with them. But the authors of this book chapter have had very good experiences ventilating initial ideas about the teaching of the case study with the case protagonists: This will usually ensure that the content of the case discussion is truly relevant (at least as perceived by the case protagonist). This does not require simply following and accepting the courses of action of the protagonist. It might be equally adequate to challenge or disagree with the protagonist's decisions, but testing the ideas will offer a better idea about the relevance of the managerial frameworks and tools that can be applied to the case situation. At the same time, case writers will learn that some content might be academically rigorous and interesting but just not that helpful in responding to a given challenge in reality. In this situation, it might sometimes be important to systematically revisit the existing literature for the most relevant content.

Both of these points highlight the critical importance of conducting field interviews and field research for case writing in close interaction with people from practice. Doing so will not only lead to better case writing but – through more relevance in the issues and content – also to improved (case) teaching. This will help to change the educator's point of view – from the supply side of available research to the demand side of real managerial issues, challenges, and problems – and it will allow educators to test the relevance of their sessions / courses with their students / participants very easily.

Bringing Research into the Classroom

Fourthly and finally, case writing can significantly improve case teaching when educators bring their own research into the classroom: It is advisable to focus the case writing on areas that are needed for case teaching and are simultaneously closely related to the educator's research. This should not only be done for reasons of efficiency; it will obviously improve the finished case study, as the teaching note will require – or at least benefit from – the writer's scholarly competence and knowledge. At the same time, the case teaching will profit from a close relation / interaction between the case writing and the research.

Educators Need to Write their Own Case Studies to Discuss their Research

Quite frequently, academic research cannot be easily translated to the classroom – and seemingly even less so to sessions that use case-based or any other type of participant-centered methodologies. Research aims at providing answers and solutions, whereas great case teaching is usually focused more on asking – and controversially debating – great questions (see, e.g., Anderson & Schiano, 2014, p. 8: "[…] the whole point of having the discussion is not which solution you choose, but the questions you must ask to uncover the alternatives."). Rigorous academic research usually tries to provide generalizations and abstract as much as possible from individual cases; even though great case studies should provide "currently useful generalizations" (Abell, 1997/2003), they nonetheless start from one single constellation. Accordingly, academics frequently find it difficult to identify and source existing case studies that would allow them to discuss some questions and findings from their research. In line with the argument already presented above, an educator's own case writing can solve such an educational need.

Leads from Research for Case Writing – and then Teaching

By combining research with case writing, such an educational need can easily be addressed: It is very possible to generate adequate case leads from research projects and then to use exactly those leads for – and in – teaching. One option to do so is to leverage reports from practitioners / experts that were interviewed for the research. They might have shared examples already. If not, try to ask for specific examples and cases the next time practitioners are approached for research purposes.

Leveraging Continuous Case Writing and Teaching for Research and Publications

An educator's own case studies can serve as highly interesting starting points for research. Lacking interesting case studies on strategic innovation and creativity, one of the authors of this chapter started to (co-)author case studies on artists and their approaches to innovation. After writing about Madonna, Pablo Picasso, and Joseph Beuys, he realized that this could easily create a whole theme about what executives can learn from the world of art. The author kept on looking for interesting artists and finally, in conjunction with other authors, created a total of seven cases on Madonna, Picasso, Beuys, Titian, Hirst, Koons, and van Gogh, turning them into a book called *The Fine Art of Success – How Learning Great Art Can Create Great Business* (Anderson, Kupp, & Reckhenrich, 2011).

The authors of this book chapter have also had very good experiences with collecting case studies from students / participants. Using case teaching for the generation of case writing leads can simultaneously help educator's improve their academic research, for example by following Eisenhardt's (1989) proposed approach to using case studies to build and formulate theories. Such practice-oriented research can then easily be brought back into the classroom and help to simultaneously advance academic knowledge (e.g., by validating initial / preliminary ideas and/or findings through discussions with practitioners) and the participants' mastery of a certain subject area.

CONCLUSION

The authors of this book chapter attempted to describe various ways in which case teaching can inform case writing, and vice versa. But although the authors believe that both activities can logically be separated, they simultaneously believe that it is most helpful to view case teaching, case writing, and even research, in a holistic and intricately interrelated way. When done well, together they can create a reinforcing cycle through the generation of highly practiced and relevant content. Case teaching and case writing are not separate activities! Both have the same objective – participant-centered learning and the advancement of knowledge about the practice of management – and the aim of both is to be as close to practice as possible. Therefore, it is important to not only anticipate the use of a case study while writing it, but also to anticipate the writing while testing ideas for potential case studies. This, of course, also includes potentially abandoning ideas that do not lead to the desired outcome: an engaged and informative discussion in class.

REFERENCES

Abell, D. (1997/2003). *What makes a good case? (IMD Technical Note, IMD-3-0731)*. Lausanne: International Institute for Management Development.

Andersen, E., & Schiano, B. (2014). *Teaching with Cases – A practical guide*. Boston: Harvard Business Review Press.

Anderson, J., Kupp, M., & Reckhenrich, J. (2011). *The fine art of success: How learning great art can create great business*. London: Wiley.

Barnes, L. B., Christensen, C. R., & Hansen, A. J. (1994). *Teaching and the case method: Text, cases, and readings*. Harvard Business Press.

Edmondson, A. (1999). Psychological safety and learning behavior in work teams. *Administrative Science Quarterly*, *44*(2), 350–383. doi:10.2307/2666999

Eisenhardt, K. M. (1989, October). Building theories from case study research. *Academy of Management Review*, *14*(4), 532–550.

Erskine, J. A., Leenders, M. R., & Mauffette-Leenders, L. A. (2011). *Teaching with cases* (3rd ed.). Ontario: Richard Ivey School of Business.

Harvard Business Publishing. (n.d.). *Case method teaching*. Retrieved January 11, 2016, from https://cb.hbsp.harvard.edu/cbmp/pages/content/casemethodteaching

Heath, J. (2015). *Teaching and writing case studies – A practical guide* (4th ed.). The Case Centre.

Hofman, A., Müller, U., & Bhattacharya, C. B. (2014). *Axel Springer and the quest for the boundaries of corporate responsibility (ESMT Case Study No. ESMT–714–0143–1)*. Berlin: European School of Management and Technology.

Ivey Business School. (n.d.). *Case method workshops*. Retrieved January 11, 2016, from http://www.ivey.uwo.ca/workshops/

Korotov, K., Müller, U., & Schäfer, U. (2009). *"Do you really think we are so stupid?" A letter to the CEO of Deutsche Telekom (ESMT Case Study No. ESMT-409-0100-1)*. Berlin: European School of Management and Technology.

Kupp, M., Dahlander, L., & Morrow, E. (2013). *Team Wikispeed: Developing hardware the software way (ESMT Case Study No. ESMT–813–0139–1)*. Berlin: European School of Management and Technology.

Leenders, M., Mauffette-Leenders, L. A., & Erskine, J. A. (2010). *Writing cases* (4th ed.). Ontario: Richard Ivey School of Business.

Mauffette-Leenders, L. A., Erskine, J. A., & Leenders, M. (2005). *Learning with cases* (3rd ed.). Ontario: Richard Ivey School of Business.

Müller, U., & Pandit, S. (2014). *Vodafone in Egypt: National crises and their implications for multinational corporations (ESMT Case Study No. ESMT-714-0144-1)*. Berlin: European School of Management and Technology.

Müller, U., & Schäfer, U. (2010). *Anna Frisch at Aesch AG: Initiating lateral change (ESMT Case Study No. ESMT-410-0112-1)*. Berlin: European School of Management and Technology.

Schäfer, U., & Müller, U. (2015). *Deutsche Bahn AG: The heartless train conductor (ESMT Case Study No. ESMT-715-0162-1)*. Berlin: European School of Management and Technology.

The Case Centre. (n.d.). Retrieved January 11, 2016, from http://www.thecasecentre.org/

Vega, G. (2013). *The case writing workbook: A self-guided workshop*. London: M.E. Sharpe.