

WRITING A CASE

This is an extremely interesting activity, for the writer, and the reader. For the student who will eventually study it and learn from it, teaching by the case method will develop all sorts of skills: analytical, decision making, application, oral and written communication, time management, social, creative. Which are all things that the case writer needs to keep in mind when writing the case in the first place. For the case writer it will develop logical thinking, planning and investigative skills. Some important tips:

- Always use the past tense throughout the case, except in direct quotes and exhibits.
- Keep your writing style clear and concise, without idioms or colloquialisms. I understand that it'll seem awkward in the beginning but we'll all get used to it!
- Use information the company will approve the release of. If you're going to use a disguise, make sure the information can still be clearly understood.
- Give your case a neutral title: it does not need to be creative

The Case

1 The Opening Paragraph

The most important part of the case is the opening paragraph. In the words of James Erskine, the internationally renowned case writer and teacher: "The opening paragraph can be seen as an eyepiece or a lens that directs the reader of the case through the subsequent information." It is the basic introduction to the case, and tells the reader what the problem is, and what the setting is: it puts the whole case in context. Therefore, it needs to be the most focused part of the case.

And it must:

- a) Identify the **decision maker** by name and position
- b) Identify the **time** of the case
- c) Identify the **location** of the organization
- d) Identify the **issue / decision / problem / opportunity**.
- e) This must be **interesting** enough for class discussion, or, as in this case, for publication in an international journal
- f) Identify the **action trigger**: what was it that made the decision maker decide to do something about his / her issue / decision / problem / opportunity?

Try to keep the opening paragraph to about 60 words. Don't follow this rule slavishly, but generally everything that needs to be said in the opening paragraph can be said in about 60 words.

Look at this opening paragraph:

It was 7th October, 2002, and Faisal Hussain was sitting in his office staring at the sun setting behind the mountains, through his window. He was going over his company's annual progress report. Northern Artisans was in trouble: they had become unable to market the local artisans' products they had been selling for the past five years and their profits were down. Hussain was wondering how to bring the sales back up.

This paragraph has several weaknesses:

1. We don't know who Faisal Hussain is, so we don't know his decision making power.
2. The fact that the sun is setting behind the mountains is completely irrelevant to the case. (This kind of writing is especially attractive to beginners, but please avoid it!)
3. There is no action trigger. The company's sales have gone down, but we need to know why: and what was it that suddenly made Faisal Hussain decide that something should be done about the situation? Why now, why not six months ago, or a year?
4. It's too long (72 words), yet there is vital information missing. This means that we've used words unnecessarily: what we could have said in five words, we've said in ten.

Now look at this revised opening paragraph:

7th October, 2002: Faisal Hussain, CEO of Northern Artisans, was sitting in his office in Gilgit⁴ going over the company's annual progress report. He was disturbed at the thought that marketing the local artisans' products was now going to be extremely hard, because international tourism had fallen off after 9/11. Hussain wanted to develop an appropriate program.

This is a better opening paragraph because it contains:

1. The date
2. The decision maker's name
3. The decision maker's position in the company
4. The location of the company
5. The problem
6. The action trigger
7. It is short, sharp and succinct. Words have not been wasted: it has all the information we need, yet it is 57 words only

2 Company Background

Here you can write about company history, financial status, who started it and why. This is classic background information: it will be used by the students, in part, to learn about the business environment of the country, so we can use some extraneous information as well. But it's important to remember that we must not inundate the reader with information: relevant issues only should be discussed. For example, in an accounting case pertaining to balance sheets where the discussion will revolve around Generally Accepted Accounting Principles, lengthy company background will not be relevant.

3 Specific Area of Interest

In many cases, the issue / decision / problem / opportunity lies in one specific area of the company: marketing, human resources, production, etc. You can include the history of the department in question, recent changes, relations with other departments, main responsibilities, challenges. If it's a marketing case, you can write about marketing structures, etc.

4 Specific Issue / Decision / Problem / Opportunity

The specific issue can be given greater discussion here. For example, if the specific issue is the launch of a product, you can discuss issues the product manager might be grappling with, like whether the product should be launched nationwide or not, what response is expected from competitors, will this new product lead to cannibalization of the company's existing products.

5 Alternatives

This is optional. Although most decisions involve a choice between alternatives, it is up to the case writer to decide whether he / she wants to give them to the students or to make the case more difficult by making the students themselves come up with alternatives. It will vary case to case.

6 Conclusion

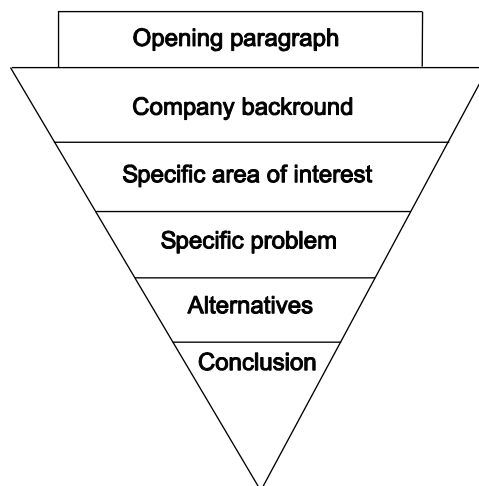
Make it short and to the point. It is useful to reiterate the problem and talk about the way forward. But **DO NOT** go beyond the date given in the opening paragraph – that date is your final date, the date at which the case ENDS. We cannot talk about any action that took place after this date. Consider this conclusion to the same case as the opening paragraph we looked at earlier:

The products the artisans made were good quality, traditional wares which had been extremely popular with foreign tourists. Now, in the absence of such tourists, Faisal Hussain knew that new markets and new promotion alternatives had to be found.

This conclusion reiterates the problem, and talks about the way forward. Most importantly, it brings us back to the time and place of the opening paragraph.

Don't be overly concerned if your case is brief. Brief is good. It simply means, nine times out of ten, that you've managed to organize everything well.

In his book *Writing Cases*, Jim Erskine recommends organizing your case as follows:



This is your case outline. The triangle illustrates the main headings, and also demonstrates the required detail, in terms of length, of each part of the case: after the opening paragraph, the greatest detail should be on company background, with specific area of interest slightly shorter, and so on.

Use headings. They will make the case clearer, easy for the reader to understand and easy for you to write. Just remember that overdoing it can be distracting.

Editing Your Case

Now that you've written your case, you need to check it over, using this checklist:

- 1 Are there any gaps left in the story you've told?
- 2 Have you used the past tense throughout the case? Are the words, especially names of people and places, spelled correctly?
- 3 Would some information appearing in the case body, for example tables and charts, be better presented in the form of an exhibit?
- 4 Sometimes, information is easier for readers to understand if it is in tables or charts rather than paragraphs. Would some of the information in your case, presently a paragraph, be better understood as part of a table or chart?
- 5 Are the words chosen used in everyday language?
- 6 Does your case have many abbreviations? Too many of these will confuse the reader: if an abbreviation is explained on the first page only, by the time you're on the third page you've forgotten what it means. Wherever possible, write the name out in full.

There should be enough work in the case for the students to do as preparation for the case for about two hours. A typical class is of 70 minutes: the case should keep students and instructor busy for the duration of the class.

Your case is now complete. All you have to do is get the release and finalize the teaching note, and you're in business.

WRITING THE TEACHING NOTE

This is an integral part of the case, without which the case is not complete and will not be accepted, by a university or a publication.

Remember: the case has been written because we have a specific objective in mind. We want to teach a certain function, and we'll teach it through the case. Also remember that it is difficult to have a good case without a good teaching note.

Without a good idea of what the teaching note will involve, it's impossible to write a good case. For this reason many case writers write the teaching note before they write the case.

In a case, everything revolves around **why** the case is being written. The teaching objectives are the most important aspect of the case: first you decide the teaching objectives, then, to illustrate them, you write the case. For example, the instructor wants to teach a certain aspect of management in an NGO. He will search for a potential case somewhere in the NGO sector, a case which involves the kind of problem he wants to discuss. Then he'll have it written out.

The teaching note must contain the following:

- 1 **Brief synopsis of the case, including immediate issues:** the decision maker's key concerns, within the company. The main problem can be discussed here.
- 2 **Teaching objectives:** what exactly will the case teach the student? Analytical skills, managerial, what? These should really be thought out before you begin to write the case:

they are the reason you're writing the case. We use the case as a vehicle to teach a point. It must be applicable to other, similar situations: otherwise it's just a story.

The case writer should be extremely clear about which teaching objective the case was written for. The case has to be linked with a certain module that the instructor wants to teach, for example, the four Ps of Marketing. The instructor could have several cases for each P.

Typically, the case should teach for example an aspect of management which has applicability not just to the case situation but many other situations as well. A case so unique that it can't be applied to another situation may make a good story, but is not useful as a teaching tool.

- 3 Suggested student assignment** – the usual practice is to ask the student to put him / herself in the position of the focal person of the case, the person identified in the opening paragraph, and to make a decision. Additional assignment questions can be more specifically related to the course content: “What is your analysis of the production process?” and “What is the profitability of the proposed investment?” and “Who are the key stakeholders in this case and how will each react to the proposal?”
- 4 Suggested additional reading / data gathering**
- 5 Possible teaching aids** such as samples, advertising material, photographs, articles, videos, computer programs, CDs, visitors to class
- 6 Discussion questions** for use in class, to facilitate class discussion.
- 7 Case analysis** – answers to the suggested student assignment. You need to analyze the case in detail beyond which you'd expect a good student to do. This should give you an indication of whether the case has enough material to reach its objectives. If it doesn't you might have to revise the case.
- 8 Suggested time plan** – how much time will the teacher need to teach the case? What should he / she emphasize on, which parts of the discussion should take the most / least time?

Now your case, and your teaching note, are complete.

Note: for more detailed information see *Writing Cases*
by Michiel R Leenders,
Louise A Maufette-Leenders and James A Erskine