

# THE ULTIMATE GUIDE TO COMPACT CASES

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# THE ULTIMATE GUIDE TO COMPACT CASES

Case Research, Writing, and  
Teaching

By

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## ABOUT THE AUTHOR

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## WHY WRITE COMPACT CASES?

If you enter the term “compact case” in an Internet search engine, the results will show small cases for cameras, vintage makeup, computers, or facial powders. Wikipedia defines a Compact Case as a cosmetic product, usually round shaped, that typically contains a mirror, face powder, and a powder puff. Hardly the type of thing one could write a whole book about ....

For our purposes, Compact Cases are a specialized form of teaching case study. Typically used in business schools, a Compact Case is a teaching case of fewer than 1,000 words in length. Designed to be read in 15 minutes or less, Compact Cases were developed to overcome student’s lack of preparation for case discussions. Little learning takes place if students have not read nor prepared for the discussion and analysis of cases. Compact cases were launched by *The CASE Journal* in 2015 “to make cases accessible and readable by the students ... to encourage better learning and stronger learning outcomes.”<sup>1</sup>

Research findings and anecdotal evidence suggest that today’s students are increasingly reading less and less. As case writers, we are compelled to address these issues to improve student learning and learning outcomes. A well-written Compact Case provides students with sufficient information about the situation in a readable and useable format. Classroom discussion focuses on the facts and issues outlined in the case producing more effective learning outcomes for students. Students respond strongly to Compact Cases and seem better prepared to participate in case discussions actively. The discussion is lively, students are more engaged and thinking critically about the case situation.

Other case writers, case journals, and case collections have embraced short cases, offering cases ranging from three pages in length to fewer than eight pages. The trend toward shorter cases

*reflects changes in the present generation of students. They do not like the 25-page Harvard case anymore. They like 8 pages or 10 pages, and they really like the 3 to 4-page cases. What we are likely to see in the future is shorter cases.*<sup>2</sup>

Another professor equated shorter case lengths with better student analysis, saying,

*Cases don't have to be too long. Some good cases are only two or three pages. Students may give more scrutiny to these brief cases than they would a 20-page case.*<sup>3</sup>

Before going much further in our discussion of short or Compact Cases, it may be worthwhile to briefly examine the founding of the case method for business education.

## A VERY BRIEF AND HOPEFULLY NOT BORING HISTORY OF CASES

In a 1920 memo outlining the vision for the Harvard Business School (HBS), Dean Wallace Brett Donham wrote about the focus for business education. Students should

*be required to investigate facts, to sort undigested material, to state problems, to analyze problems, to reach conclusions and to present the subject matter and HIS decision orally and in writing, as HE will be required to do in business ....*<sup>4</sup> (Emphasis added as, of course, there were only MEN in the business school in 1920)

Inspired by this vision, Harvard professors developed a “problems” approach to teaching, creating the first casebook for marketing classes in the fall of 1920.<sup>5</sup> In the more than 100 years since the HBS implemented “problem-based learning,” the case method has become well established in

many business courses such as Business Strategy, Marketing Strategy, Business Ethics, International Business, and others.

## DEFINING TEACHING CASES TODAY

Today, the problem-based learning of a century ago is embodied in teaching cases. Teaching cases provide factual descriptions of events designed to stimulate student discussion and analysis. For Naumes and Naumes, teaching cases

*provide a means by which readers can learn through the discussion of actual situations and circumstances, by following the actions and analyzing the thoughts and decision processes of real people, faced with real problems and in real settings.*<sup>6</sup>

Vega defines teaching cases as factual stories that prompt the reader to either make a decision or recommendation or perform analysis or evaluative descriptions of actions that have already taken place.<sup>7</sup> Erskine and Leenders defined a teaching case as “a description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person (or persons) in an organization.” Cases allow students to step into the minds of leaders and decision-makers to analyze the situation, develop alternatives, and choose a specific course of action.

Modern teaching cases and the case method have three distinct roles in business education. First, case discussions help students develop diagnostic skills in a world where markets and technologies are constantly changing. Students learn to identify and characterize common and distinctive elements of business problems. Second, case discussions help students develop persuasive skills. Students learn to present a compelling argument supported by evidence to persuade others to adopt specific courses of action. Third, cases put students in the habit of making decisions – creating a “bias for action” critical for business leadership.

For this book, cases can be defined by the following key elements:

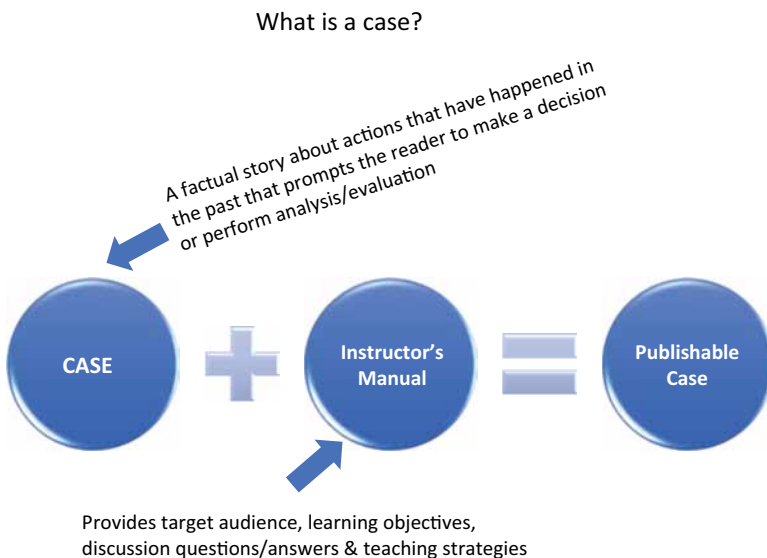
- **Factual.** Cases are factual descriptions of events that happened in the past involving real people faced with real problems in real settings.

- **Learning tool.** Cases are designed to provide learning opportunities for students to develop diagnostic, decision-making, and analytical skills.
- **Learning goals.** Cases have a specific teaching/learning purpose. The purpose or learning goals of the case determine its contents and how it is used in teaching.
- **Learning outcomes.** Cases are designed to help students develop the critical and creative thinking, persuasive, and communication skills organizational leaders need.
- **Active learning.** Learning with cases is student rather than instructor focused. Students perform the analyses and activities, applying theoretical concepts to real-world issues or problems. Students are given responsibility for their learning, taking an active role in the discussion process and reflecting on what they have learned. Students are fully engaged in the learning process with cases rather than being passive participants.

Cases have two parts – the case itself (what students read) and the instructor’s manual (what instructors read to understand how to utilize the case most effectively with students), as shown in Exhibit 1.

---

### Exhibit 1. What Is a Case.



## WHAT DO I NEED TO KNOW TO WRITE CASES?

Good cases are written by those who possess what educators refer to as pedagogical content knowledge (PCK)<sup>8</sup> (see Exhibit 2). PCK

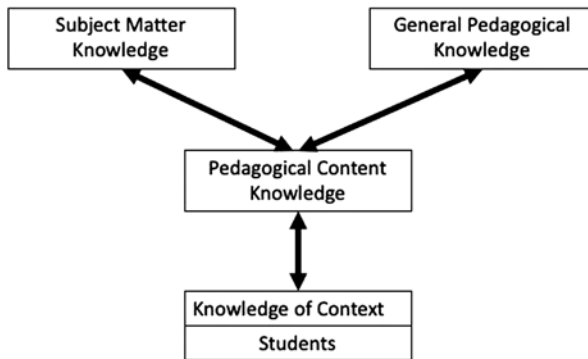
*is a type of knowledge that is unique to teachers, and is based on the manner in which teachers relate their pedagogical knowledge (what they know about teaching) to their subject matter knowledge (what they know about what they teach).<sup>9</sup>*

Case writers utilize three types of knowledge:

- **Subject matter knowledge** (what they know about their academic discipline) such as knowledge of financial accounting or business ethics.
- **Pedagogical knowledge** (what they know about teaching) such as knowledge about how to effectively facilitate case discussions.
- **Contextual knowledge** (what they know about their students) such as knowledge about the unique needs of undergraduate students in the second year of their degree program.

Subject matter knowledge is central to the case writer's decisions about the learning objectives for the case (which in turn determines what goes into the case and what does not). The writer's knowledge of the subject and theoretical models and frameworks commonly utilized in the discipline are critical to the content of the instructor's manual. The writer's knowledge of her students (labeled Knowledge of Context in Exhibit 1) may shape the case by determining the level of student and the specific course(s) the case is designed to address. The writer's general pedagogical knowledge or the specialized knowledge instructors use "in creating and facilitating effective teaching and learning environments for all students, independent of the subject matter"<sup>10</sup> will shape the case and instructor's manual. Put more simply, to be a good case writer; we must know our discipline (subject matter knowledge), know the needs of our students (knowledge of context), and know effective teaching strategies (general pedagogical knowledge). These three knowledge bases provide a three-legged stool for case writing excellence. If one of the "legs" is missing or incomplete, the stool cannot stand.

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**Exhibit 2. Pedagogical Content Knowledge (PCK)**


Adapted from: Grossman, P.L. (1990)

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## GREAT CASE WRITERS

Heskett suggests that there are six qualities of great case writers. These qualities include:

1. Curiosity.
2. Comfort with ambiguity, since cases may have more than one “right” answer.
3. Command of the topic or subject at hand.
4. Ability to relate to the case protagonist.
5. Enthusiasm for the case teaching method.
6. Capacity for finding the drama in a business situation and making it feel personal to students.<sup>11</sup>

As you see, Heskett’s list mirrors the framework for PCK. Case writers need to have a firm grasp of the subject matter to be the focus of the case. Understanding the topic or subject at hand will be critical to the writing of the case (determines what information must be provided in the case) and in the instructor’s manual (determines the theoretical lens that is to be applied in

the analysis of the case). Item 5 on the list addresses the general pedagogical knowledge component of the framework. Instructors who are enthusiastic about case teaching and have significant experience with it will draw upon that knowledge and experience to write compelling cases for students. Comfort for ambiguity (Item 2) fits well with the general pedagogical knowledge component as most experienced case teachers have been surprised at how many “right” answers a group of students can develop for a case. Curiosity and the capacity for finding the drama will influence the writing style of the case. In contrast, the ability to relate to the case protagonist will be essential if interviews are used to gather the information to be contained in the case.

The good news in both the PCK model and the list of qualities is that case writers can learn most of these skills, qualities, and knowledge. We can learn to teach effectively with the case method by attending workshops or observing skilled case teachers. We can study the subject matter to understand the key issues and analytical models of the discipline (most of us did so in our graduate studies or our work experience). We can learn how to write effective cases and instructor’s manuals using books such as this one. Case writing workshops can help you polish and improve your work. Although case writing has evolved into a writing genre with shared literary conventions and an overall predictable form, you can learn the conventions and forms to become a case writer. Great case writers are like leaders; they are MADE, not born that way!<sup>12,13</sup>

## WHY WRITE CASES?

As shown in Exhibit 3, many reasons inspire individuals to become case writers. These reasons include:

- **Filling a pedagogical gap** – Some individuals are drawn to case writing because they believe in the case method but cannot find a case that addresses a critical topic in the course. If you can’t find a perfect case, then write one!
- **Satisfying intellectual curiosity:** Some case writers have strong desires to understand how a company (or industry) works. Researching to develop a case about that company may satisfy their need to understand its operations better.

- **Sharing best practice:** Some case writers learn about a great company in their city or state and want to share the unique things the company has done as an illustration of best practice. Writing a case provides students with a way to share effective practices.
- **Creating links between academia and industry:** The case writing process forges bonds between case writers (academics) and practitioners (industry). These links provide faculty development for the case writer, while practitioners may benefit from critical reflection about their enterprise during the data collection process. Connections may also be necessary for bringing scholarships, internships, and job opportunities to students at the case writers' institutions.
- **Responding to pressures to publish:** Many accrediting bodies have recognized the publication of teaching cases as acceptable scholarly work. Case publications may be necessary for professors of practice (individuals without PhDs who have joined academia after having significant business careers).
- **Desiring to have an impact:** Many are drawn to case writing because they want their scholarly work to have an impact or make a difference. Publications of empirical articles may not have sufficient readership or application to practitioners to satisfy this need. Cases provide learning opportunities for students who are often transformed by the case method. Many case writers understand that cases help students develop essential skills that will serve them well as organizational leaders.

Whatever your reason for wanting to write cases, this book is designed to help you do it.

## LET'S BEGIN THE CASE WRITING ADVENTURE!

When I envisioned this book, I pictured it as something akin to the travel guides on my bookshelf (thus the book's title as *The Ultimate Guide to Compact Cases*). I liked the idea of thinking of the case writing process as an adventure or an exploration of new territories. Some "travelers" know the way forward as they have already written (and maybe published)