



European Commission
Enterprise and Industry



How to Write Case Studies

EuroEntreCases
- an EU Funded Project

Skills 'Arguably' Developed By Students Through Cases

- Analytical
- Decision making
- Application of theory
- Oral communication
- Time management
- Interpersonal/social
- Creative
- Written communication

Case Study Vs Case History

- Forward focused
 - Usable at all levels depending on the case complexity
 - Invites you into a role (person)
 - Primary task is to recommend what the person / organisation should do next
- Backward focused
 - Useful early (1st years)
 - And post experience (MBA)
 - Invites judgement
 - Primary task is to analyse / reflect upon what the person / company has done in the past

What Is A Case Study?

- It is a story that the reader can follow
- It is usually based on a real person / organisation
- It may be disguised for a variety of reasons (protect the identity of a person, company does not wish to reveal itself, stop students from checking the internet, etc)
- It is incomplete and decisions have to be made on imperfect information
- It invites the reader into a specific role (e.g. CEO, Marketing Director, etc) and the reader must act as that person
- The reader must then take the organisation forward
- It therefore involves analysis and prescription



What Makes a Good Case

- It deals with a number of different and substantive issues
- Creates a discussion/decision points
- A good story (but the story is not the objective)
- Students can engage with the case (not the same as 'like')
- It is current in terms of the issues being addressed
- Readable in terms of being able to understand the content
- Functions at different levels
- Is realistic in terms of what is possible
- Is clear about target audience
- Relates well to course subject area

What Are Your Sources

- A previous life
- Past students
- Post experience class (e.g. MBA)
- Joint case with somebody else
- Project/dissertation
- Friend/relative
- Consultancy
- Cold call/contact
- Attendance at a seminar
- News item

Key Case Choices

- Choice of Topic
 - Business Stage, Business Size, Profile of Entrepreneur, Profile of Business, Business Issue
- Choice of Timing
 - over what period does the story take place
 - when must the decision be taken
- Choice of Decision Maker or Focal Person
 - CEO, Marketing Director, etc

Typical Case Layout

- Introduction / opening paragraph
 - Sets the scene / context
 - What are the problems / issues
 - When is the deadline for a decision
- Organisation / person background
- Background environment
 - Industry
 - Country
- Origin and evolution of key business issues
- Focus on the key areas of interest
- Examine specific problems / decisions
- Outline possible alternatives
- Close
 - Return to opening scene



Action Triggers

- Action triggers are normally used in the opening paragraph
- Action triggers can be
 - A communication (e.g. “An email arrived that morning asking the Marketing Director to develop a new strategy ...”)
 - An inspired thought (e.g. “While eating out during a vacation in Spain with her family, the Managing Director of the Irish Food Co. suddenly saw a wonderful opportunity on her plate”)
 - A significant internal event (e.g. “The recent robbery in the warehouse had left the company’s stocks severely depleted..”)
 - A significant external event (e.g. “The recent global recession had ...”)
- What does an action trigger do
 - Starts the clock ticking
 - Indicates the timeframe available to the decision maker
 - Introduces the context
 - Indicates the focal person(s)

Case Length

- Depends - what will you use it for?
- What objectives/lessons are you seeking to achieve with the case?
- Be prepared to edit – long and rambling is not good
- Make sure all of the details are correct
- It is highly beneficial to include tables, diagrams, financial data, etc to stretch the ability of the student to analyse information and use what is most relevant
- Generally, case studies should be more than 5 pages but should not exceed 20 pages in length (corresponding to approximately 2,000 – 8,000 words), including references, figures and appendices

What Does a Poorly Constructed Case Look Like?

- Poor structure or flow to the case
- Dense and heavy – hard to get interested (this can happen particularly with scientific or engineering companies)
- The material is too repetitive – gets boring
- The material is rambling – no key point to it
- The details of the company / person are mentioned too late in the case
- No relationship shown between position of company in the value chain and the issue under consideration
- Teaching Note repeats case material

Disguising Material

- Need anonymous source
- Secure data
- Throw students off the scent
- Disguising is easier in small organisations
- Be very careful of figures which do not add up
- Ensure that changes to financial figures make sense with other elements of the case
- If changing a person's name, keep their sex, position and background
- If changing a company's name, make sure that the new name does not belong to some other company

Issues With Large Organisations

- Generally more understanding of the benefits of being used as subjects for a case study
- May have stock exchange issues which might limit access to information
- Will need formal clearance by several layers (e.g. finance officer, legal officer) or at a high level (e.g. CEO)
- Are likely to be more remote and less emotionally involved



Issues With Small Organisations

- Clearance is easier / less formal
- Managers/owners are less likely to have any experience of the concept
- Issues in the case are more likely to be local and so may not be relevant in another country (depending on how the case is written)

Contacting The Organisation

- Personal contact is invaluable
- You must explain the process and where the material will end up
- Explain what is in it for the organisation
- Assure them that they can withdraw the case at any stage
- The company gets to review the case after each draft and before signing off after the final draft has been read
- Getting the company to sign a Release
 - Assures academic honesty
 - Authenticates the data
 - Grants permission to use the case
 - Helps maintain a positive relationship

Sourcing And Collecting Data

- Within the organisation
- Interviews
- Published reports
- Newspaper files
- Internet
- Libraries
- Students who attempt the case

Common Errors

- Flattery – keep it factual
- Figures do not add up – check for consistency
- No clear decision/discussion point
- Limited options
- Options too obvious
- Not engaging

Editing A Case

- Edit and re-edit
- Proof-read and get somebody else to do it also
- Reference properly
- Put your copyright on front or back page
- Include disclaimer on front page
- Sort contents under appropriate headings
- Make sure appendices are tidy and coordinated with main text
- Assume it will be published and (maybe) read by your peers
- Be careful how you state things
- Embrace external editing

Is A Teaching Note Essential?

- Yes, it is a necessary evil
- It helps you to structure the case more effectively and to write with greater clarity
- ECCH note a bigger take up with a TN
- Useful for case teachers
- Good discipline

What Should A Teaching Note Contain?

- Case summary
- Teaching objectives and target audience(s)
- Suggested teaching approach and strategy
- Analysis techniques recommended, preferably worked through
- Additional readings and references if helpful
- Suggested strategy development and/or strategy questions which might be raised
- Feedback on use and update if available

DOs & DON'Ts With A TN

- Do try teaching the case on a class before finalising the case and TN
- Do not introduce new material in the TN which properly belongs in the body of the case – it is unfair to students
- Do revise it once or twice
- Do not let the TN into the public domain