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How to Write a Business Case Study

A business case study confronts students with a real-life dilemma and engages all their abilities to solve its challenges. In presenting a specific business or policy situation—one that does not have an obvious solution—the case provides information for classroom discussion and other study. A good case study stimulates an educated conversation and the building of business knowledge.

The best case studies are learning-centered, not instructor-centered. Details describing the differences between the two can be found in **Exhibit 1**. A student reading the case should be provided with the information needed to make good decisions about the case, or the ability to find the information if that is a learning objective. Information critical to solving the case should never be contained exclusively in the case's teaching note, because doing so puts the instructor in the center of the learning, and leads to frustrated students.

Cases should satisfy professors and students as well as the businesses, organizations, and people featured in the cases. Although these interests might appear in conflict, a case that is written with fairness and intelligence will ultimately receive the respect of all parties.

The best cases have several structural characteristics in common including a protagonist, specific time frame, and use of past tense. An author who becomes experienced in case writing may deviate from this pattern, but doing so may result in an inferior case.

The structure is discussed more fully below, but in general each case opens with a well-crafted story that establishes the problem and the context, as well as the protagonist. It is essential that the case "hook" the student in the introduction. One of the critical responsibilities of the case writer is to make the case and the protagonist interesting and generate empathy within the first one to two pages. The rest of the case provides deeper background and context, introduces new characters, broadens the initial problem to display its complexity, and then revisits the opening scenario to conclude the case.

A case study has one central decision point, dilemma, or angle. The nature of the situation should be clearly apparent within the first two paragraphs. In general, a case study has a central character who is facing a challenge and needs to make a decision. This person is the *protagonist*.



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The protagonist is a true-to-life character within the case who feels time pressures, may make mistakes, has incomplete information, makes assumptions, and has biases that affect his or her decisions. The entire case revolves around the protagonist, for whom students should feel empathy with regard to solving the case in the best way possible. It is preferable to use an actual person as the protagonist. However, elements of his or her background may be fictionalized to suit the teaching objectives.

Each case study takes place within a specific time frame. For example, a decision might have to be made before a board meeting, prior to a press conference, or before a meeting about the future strategy of the organization. In any event, the decision is set at a specific point in time, and everything happening after that point is not known by the protagonist. In this way the author prevents "scope creep" by eliminating any information that comes after the decision point.

It is critical that the case be precise and nuanced, and that the writing be clear and concise. Writing should not be colloquial nor overly formal. The case story should be engaging and interesting to the reader. It is imperative to write objectively, although the case writer may portray biases of the protagonist. For example:

Instead of writing:

"Since 1873, Kohler Co. had been improving the lives of its customers with exceptional products and services."

It would be more appropriate to say:

"CEO Herbert Kohler strongly believed that his company improved the lives of its customers through its products and services."

It is important to avoid jargon that is specific to a particular field, and to avoid using cultural-specific metaphors when straightforward diction is more appropriate. For example:

Instead of writing:

"Janson really felt that she had to hit a home run with the presentation to secure adequate funding."

It would be more appropriate to say:

"To secure adequate funding, Janson felt she needed to give a superb presentation."

A table comparing the important aspects of a business case study, and an academic case study is included in **Exhibit 2**.

Marketing a Case Study

Marketing a case is not usually top-of-mind for a case study author. However, as case study development begins, it is advantageous for the author to both understand and consider how his or her decisions can positively or negatively affect the marketing of the completed case study.

An example of eliminating formal and jargon-laden writing would be restating the following passage:

"The company's professionals provide executive assistance in a consulting capacity in the preeminent technology transfer societies, intellectual property focused government think-tanks, intangible finance technical journals, and non-profit invention organizations,"

As:

"The company's consultants serve technology transfer specialists, government think tanks focused on intellectual property, financial journals, and inventive non-profits."

Why should case authors be concerned about the marketability of their cases?

Professional publishers want to ensure their products have broad market demand, appeal, and profitability. So, it is in the author's best interest to help the publisher succeed. The publisher will generate revenue, the author will receive higher royalties, and the adopter of the case will get a relevant and dynamic teaching tool.

Some guidelines to help increase the marketability of a case study:

1. Case title: The case title has more impact on marketing than any other single case element. The title is used on web pages, in e-mail marketing, in print advertising, and in public relations placements, and is the primary "identifier" of the case.
 - a. Keep the title descriptive but brief—10 words or fewer (including "a," "and," "the," etc).
 - A 10-word title will fit appropriately on a web page; a 20-word title will not.
 - If the title is as long as a paragraph, there will be no room to provide a brief synopsis of the case as well.
 - An instructor who cannot quickly absorb the title of a case is not likely to spend further time considering it for adoption.
 - b. Use the name of the featured company or organization in the case title. Depending on the case, the company/organization name can be a very strong selling point for adopters. Faculty and students are naturally attracted to the names of large, well-known organizations, so do not be afraid to leverage that name within the title.
2. Case study topic: Case studies that cover broader topic areas have the potential for much higher adoption rates than cases covering a narrow topic. For example, a case about "launching a new business in an emerging market" would have much wider marketing appeal than a case about "opening a clown school for seniors in the southeastern part of Tangier, Morocco."
3. Teaching note: To achieve widespread adoption of a case, it must be accompanied by a clear, concise teaching note. Instructors need a "roadmap" of how the author teaches the case, so do not underestimate the importance of the teaching note.
 - a. Target audience: Who is the target for the case study? Domestic or international audience? Graduate or undergraduate students? Potential adopters need to know the answers to these questions, which can (and should) be addressed in the teaching note. If the case can be adapted to address additional target audiences, "how-to-adapt" instructions can be included in the teaching note.
 - b. Teaching objectives: Potential adopters need to clearly understand the learning outcomes of the case. Therefore, teaching objectives should always be included in the teaching note.

Case Structure

Writing styles will be unique to individuals developing a case, yet almost all successful cases employ the following structure:

Title and Introduction (1½-2 pages)

This segment is one of the most important parts of the case study. It should be concise, easy-to-read, and free from academic jargon, and must quickly capture the reader's attention. Students generally have a great deal of reading in their coursework, and have probably seen many case studies. The case writer's goal must be to capture and engage the reader in less than 30 seconds. As mentioned in the "Marketing the Case Study" section, the title is extremely important as well.

Some specific guidelines:

- The title should clarify what is special about this particular case—in 10 words or fewer.
- Within the first paragraph, identify the protagonist.
- Within the first two paragraphs, present—from the protagonist's point of view—the decision point. Identify other major players, if relevant.
- Provide the context for the situation. Include the situation's time frame, location, the purpose of the company or organization, relevant business factors, and the goal of the protagonist.

Background on the Company, Industry, and Competitors (3-7 pages)

This section is important because it sets the students' expectations about how the case should be solved. Case writers often add extraneous information in this section in a deliberate effort to lead students astray. It is very important in this section to avoid revealing what actually happened in the case.

Some specific guidelines:

- Begin this section with the first subhead. If the section is long or relatively complex, use more than one subhead within the section to organize separate thoughts or ideas.
- Often the best method for writing this section is to organize the information chronologically, with a very brief history of the company or organization.
- Provide the essential company, organization, competitor, and/or industry information that the protagonist had at the time of the case. Identify the company's major products, services, and customers.
- Include enough background information for the reader to analyze the decision point presented in the introduction. Revenues, profits and losses, and other financial valuations may be crucial.
- Keep this section complex enough that students cannot come to an easy decision.
- Include, as appropriate, historical information, trends, direct quotations from participants and analysts, and simple and/or essential tables and figures. The section can also include references to exhibits placed after the text, though the references should be clear and complete enough that the reader does not feel compelled to turn immediately to the exhibits.
- Consider depicting the culture of the company or organization, if relevant.
- Include the important challenges and responsibilities of the company.
- Include portions of the protagonist's career relevant to the current situation.
- Connect the background in this section to the current situation, including underlying causes and current results.
- Delve more deeply into the context and possible consequences of the decision point, dilemma or central angle. Include the consequences for the career of the protagonist as well as for the person's company or organization.
- Illustrate how the decision point or dilemma differs from the one initially perceived.
- Include the degree of urgency involved in the decision-making or the timeline for the decision to be made.
- Conclude the section with alternatives available to the protagonist.

Conclusion (2-3 paragraphs)

The conclusion revisits the problems presented in the introduction to the case. In the conclusion, the writer should draw the reader's attention back to the protagonist of the case, and briefly revisit the case study's central narrative. Although creating a sense of uncertainty and ambiguity will further the reader's understanding of the case study concepts by generating a learning-by-doing environment, it is important to remember that the case writer should set the reader up for success. Details related to solving case study problems consequently may be briefly revisited in the conclusion. The writer should employ narrative devices to create an emotional attachment to the protagonist, without exaggeration or banal sentiment. Readers who have both an emotional connection to the protagonist of the story as well as a firm grasp of the case study concepts will be more motivated to find actionable solutions to the case study problems. The conclusion should bring the teaching objectives of the case in focus. These are the questions the protagonist will be asking himself or herself at the conclusion of the case study, and these are the questions the reader of the case study will be answering.

Exhibits and Endnotes (1-10 pages)

These sections contain information that may not necessarily be relevant to solving the case. Often, case writers include information meant to be decoys—clues or other pieces of information intended to be misleading or distracting in solving the case. Exhibits can be very complex, such as complete financial statements.

Some specific guidelines:

Exhibits:

- Appear after the text portion of the case in a section with the subhead "Exhibits."
- Have titles; for example, "Exhibit 1: Basic Eligibility Criteria."
- Can include financial statements, timelines, diagrams, charts, tables, pictures, and graphs. In some cases it is possible to include or link to multimedia supplements such as an interview video with the case's protagonist. An exhibit can have an endnote or its sourcing can appear as part of the exhibit.

Endnotes:

- Appear after the exhibits, at the very end of the case document, with the subhead "Endnotes."
- Are required for anything mentioned in the text for which a reader would want to know the source of the assertion, quotation, or apparent fact.
- Are referenced in the text with superscript ordinary numerals.
 - Follow MLA style. An excellent resource for adhering to MLA style is the [Son of Citation Machine](http://citationmachine.net/index2.php) website (<http://citationmachine.net/index2.php>).

Typical Steps of the Case Writing Process**Writing the teaching note**

Many case authors write the teaching note as an afterthought. However, it is often the foundation upon which a successful case study is built. It is usually most helpful to create the teaching note at the same time as the case study is being written, and best to have it completed when the final draft of the case study is complete.

A good teaching note will ensure that a case is taught as its originator intended, and the note will give other professors a starting point for including the case in their teaching, and succeeding. It will ensure that all supporting resources are easily available for the students and other professors. A good teaching note will

be at least five pages in length. For more details on how to write a teaching note see Globalens 1-429-016 "Note on How to Write a Teaching Note."

Writing the case study

Develop the teaching objectives

Usually professors or case writers view knowledge of a specific decision or situation as the beginning of case study development. Then they attempt to lay teaching objectives over the story of the proposed case study. In most cases, this is the least effective way to start the process.

In writing a case study, it is much better to begin with solid teaching objectives. Professors with deep background in a specific discipline tend to view the situations they encounter through the lens of their discipline, and will naturally view a potential case study's decision point or angle through that same lens. Writing the objectives, which seems to be an easy step, is actually one of the most complex in the case writing process.

One of the best ways to develop teaching objectives is to answer the following question: ***"After discussing this case, students will be able to ..."*** Use an action verb to begin finishing that sentence, and consider how students will prove that they have learned the material. Aim for three-to-five objectives at increasing levels of intellectual behavior. A useful tool is the list of verbs in "Bloom's Taxonomy of Learning Domains" (see **Figure 1**)

Professors should take great care in selecting the verbs to describe what students should be able to accomplish, and ensure that the objectives are both attainable and measureable. The second portion—measureable—is where professors often fall short. It is too easy to use the verbs "understand" or "demonstrate" (or worse, "demonstrate an understanding of") and provide no way for the students to prove that they learned the material or mastered the skill.

Once the teaching objectives are clearly developed, the case writing can begin.

Identify the situation

An author can create a unique case study by choosing an industry, company, decision, problem area, or market where little data exists and conventional theoretical norms do not always apply. The context of a case is very important. Decisions are influenced by the pressures of the variables at a given time. By documenting the context, and relating it to the teaching objectives, the author will create a case study that allows students to get a feel for what was "really going on," the constraints the decision maker was facing, and the dynamics of the pressures of the job.

A writer may not be able to capture all these points but should be able to convey a feeling about the situation and context. Consequently, creative writing skills are very important. Also, writers should not overwhelm readers with facts, especially early in the case. Additional data can be included in exhibits, or even in the teaching note or other resources. However, the writer should take great care that crucial information is not contained only in the teaching note.

Identify the protagonist

Once the objectives and situation are established, the professor or case writer can introduce the protagonist.

Figure 1
Employing Bloom's Taxonomy of Learning Domains

Category	Action verbs	Examples
Remembering: Can the student recall or remember the information?	define, duplicate, list, memorize, recall, repeat, reproduce, state	After discussing this case, students will be able to list critical terms and provide their definitions.
Understanding: Can the student explain ideas or concepts?	classify, describe, discuss, explain, identify, locate, recognize, report, select, translate, paraphrase	After discussing this case, students will be able to describe how the Exxon Corporation's attempts to clean up the Valdez spill site met expectations, and also how the attempts fell short.
Applying: Can the student use the information in a new way?	choose, demonstrate, dramatize, employ, illustrate, interpret, operate, schedule, sketch, solve, use, write	After discussing this case, students will be able to choose the best funding source available to MoVirtu, and justify the choice using BoP terminology.
Analyzing: Can the student distinguish between the different parts?	appraise, compare, contrast, criticize, differentiate, discriminate, distinguish, examine, experiment, question, test	After discussing this case, students will be able to criticize the actions of both Greenpeace and Facebook in the debate over where to locate Facebook's processing centers.
Evaluating: Can the student justify a stand or decision?	appraise, argue, defend, judge, select, support, value, evaluate	After discussing this case, students will be able to argue both the "pro" and "con" sides of Patagonia's business decision to encourage the purchase of used garments over new ones.
Creating: Can the student create a new product or point of view?	assemble, construct, create, design, develop, formulate, write.	After discussing this case, students will be able to develop options for Acumen to best use the additional \$10 million in funding.

From the student's point of view, it is better to have a real protagonist than a fictitious one. Students are quick to see through attempts to make up a protagonist or to obscure the identity of a real one. If possible, seek approval to use the protagonist's real name and title in the case study.

It is important to identify the protagonist's roles and responsibilities. This information gives the student an idea of the role to assume, and the tactics the student should recommend. Note that challenges in making decisions escalate in direct proportion to the protagonist's level of responsibility in an organization. Time frames to make decisions also become more compressed for individuals with higher levels of responsibility.

To make the right decision, students must not only understand the role they must play, but also the expected decision outcome, resources available (money, staffing, etc.), and context. Elements of the case may be disguised, but the more that is fictionalized, the poorer the learning outcomes. In some circumstances the writer may need to disguise the featured company, the protagonist's role or title, or possibly the context of the case study. These elements are very important to helping the student understand the complexities of each choice and the possible outcomes. They also contribute to achieving the stated teaching objectives.

It is possible to use a team as the protagonist, but it can be more difficult for a writer to create empathy for a team than for an individual. Sometimes it is better to condense the work of a team into a single protagonist. In doing so, care should be taken that characters do not seem too extravagant or too bland.

The next step is to outline the situation from the protagonist's point of view. What is known? What is unknown? What pressures are being faced? What assumptions are being made? What does the protagonist need to do, decide, or resolve? What is the context? What biases does the protagonist carry?

A note about bias

Unlike research papers that express views based on evidence rooted in credible research, the protagonist will have biases. Including these in the case often leads to a richer, more fulfilling case study.

Important to remember is that all protagonists and writers are biased. The case author should be aware of this, account for the protagonist's biases, and keep the case writing as objective as possible.

Identifying the time frame

Each case study should include a time element to add a sense of urgency to the decision-making process. This time frame should be explained in the first few paragraphs of the case. Note the example below:

On October 1, 2010, Bob Dudley officially took over as CEO of British Petroleum ("BP"). Prior to assuming the position Dudley was in charge of BP's Americas oil spill response unit. Now he reflected on the last 10 years of BP's environmental strategy and searched for direction. Should BP reinvest in building its progressive brand or focus on remaining an oil company with an emphasis on safety? With the potential for a large disaster looming, should BP's environmental strategy be centered on safely extracting the oil? With shareholders breathing down his neck over the company's depressed valuation, Dudley had a lot to figure out. He was not responsible for the events that led up to the spill, but he would have to deal with the aftermath starting with tomorrow's board meeting.

Clearly stating the problem

As the above example shows, the case problem should be stated very clearly. For the BP case it is: "Should Bob Dudley focus BP's environmental strategy on building its progressive brand or focus on being an oil company with an emphasis on safety?"

If we examine the statement closely, we can see that the question creates a complex problem. Solving this type of problem is among the best ways to build the critical thinking skills and problem-solving capabilities needed by today's business school graduates and future leaders. **Exhibit 3** highlights some of the characteristics of problems that are presented in the best case studies.

A note about "messy" problems:

Case study authors seek to create "messy" problems for students to analyze.

Business and leadership situations often conceal what academics involved in writing about systems theory have named "messy" or "messes" (e.g., Ackoff, 1979), "soft" problems (Checkland, 1972, 1981), or "wicked" problems (Rittel, 1972). These are complex systems of sub-problems in which many different potential issues are woven together in an interdependent way. These sub-problems are closely linked to the differing values, perceptions, and world views of the many people who have vested interests in various aspects of the situation; after all, problems are as much to do with the problem-owner's needs and motives as with the external situation.

Creation of Drafts**Writing the first draft**

If a writer is still formulating ideas and putting them to paper, this is not a first draft, but an outline. The author can prepare to write the first draft by brainstorming, and getting a sense of the structure in which his or her ideas will be presented. The writer may set this forth in outline form. After completing the first draft, the case writer may still have some questions that need to be answered by the company being written about or by the professor sponsoring the project. Nevertheless, the first draft should have a coherent structure. Ideas should flow logically from one to the next. The draft should be grammatically correct and free of spelling errors. References, citations, and endnotes should be complete, as should any exhibits or appendices. Before the draft is submitted to outside sources, it should be as close to perfect as possible. The rule of thumb is edit, edit, edit. The writer should read the first draft at least three times prior to submission, and make the necessary revisions to structure and grammar.

Second draft

Any necessary additions or changes are made during the second draft. When the second draft is complete, all outstanding questions should be answered. Facts and financials will be accurate and up-to-date. The second draft is complete, well-structured, and free of errors. All necessary stakeholder approvals have been obtained. Any missing source information is added along with endnotes. At this point, the case study is ready for review by the editor, and should be publication-ready. Based on the determination of the editor, a third draft may be required if the case still needs additional content, structure, or clarity.

Research

When researching the case study, the case writer should be in full contact with the featured organization. While case studies often are completed using information that is publicly available, interviews, personal stories, anecdotes, and details from individuals at the center of the issue allow the case writer to weave a more compelling narrative.

Sources may be primary or secondary but should be authoritative. Financial information should be the most accurate and up-to-date. (Note that information on Wikipedia is not considered verified or accurate.)

Obtaining the Company's Permission to Use the Case Study

No matter how strongly the case study meets desired teaching objectives, it will be of no use without permission to use the case study from the featured organization or company. In particular, if the case

employs insider information, permission must be obtained from the company to use, publish, and market the case study.

Organizations can be notoriously frustrating to work with in this regard—especially large, complex organizations with sophisticated legal and marketing departments. Once the case is complete, it can take months (or longer) to obtain permission and approvals.

It is better to let the organization know up front that you are writing a case study that will be used in teaching, and published for use in institutions of higher learning around the world. Assembling the right team of advocates for the case study is a critical task, and should include representatives from inside the company.

Globalens has developed a “FAQs for Featured Organizations” (see **Exhibit 4**) that can serve as a starting point in the discussions with a company. Some specific guidance:

- Highlight that having a case study about the organization results in better-prepared graduates and improved recruiting for the organization.
- Give the company contact enough time to review the document. Remember, if the case study lands on the CEO’s desk for an approval with a short time frame, the likely response is “No.”
- Allow enough time to obtain permission from the organization. Do not be surprised if it takes six months or more.
- Make certain that you have an advocate inside the company, and at the right level.
- If your advocate does not have permission to approve and release the case study on his or her own, ensure that the case study drafts are being reviewed at higher levels, as well as in marketing and legal departments. Obtain written documentation of each successive approval.
- Provide a project scope document that specifies how quickly the organization will need to circulate and comment on the drafts, and a written (and signed) agreement about what will happen if the company is unresponsive (e.g., “If no comments or feedback are received within five business days, work on the case study will proceed and the organization will forfeit the ability to alter or object to the material contained in the draft.”) Remember that, as the case writer, you must be equally responsive to the organization or company.

Sometimes companies agree to participate in the preparation of case studies only if they can exercise control of the document’s content. Case writers who encounter such a situation should:

1. Inform their supervisor as soon as possible.
2. Agree to negotiate revisions with the company at the point in time between a final draft and editing.
3. Propose that the company’s review of the final draft be completed at only one point in the process and returned by a predetermined date.

Copyright Clearance and Exemptions

It is recommended that legal counsel assist case writers with copyright issues and requirements. Prior to publishing, authors must clear permission to use any content that has not been created by them. The protections that apply to copyright when *teaching* do not apply to *publishing*. Best practices are to obtain the following in writing:

- Non-exclusive rights to reproduce the material.
- Print and electronic rights.
- Use of material for the life of the work

Copyright is especially important for tables, figures, and exhibits. In order to publish the author must:

- Obtain written permission in advance from any third party copyright owners for use in print and electronic formats of any text, illustrations, graphics, or other material, used in their case study.
- Inform the copyright holder if any material is significantly adapted.
- Reference the source on tables, figures, and exhibits.
- Be diligent when seeking permission for content which is freely available on the web.

Additional information is provided in **Exhibit 5**.

Submission Process at Globalens

When a case is submitted to Globalens it will go through a rigorous review to make sure that it follows all of the standards of a good case study, including strict adherence to the MLA style guidelines. The exhibits will be reviewed to ensure that all materials have clear copyright. A research associate will work with the author to prepare the case for publication. This may require several rounds of feedback and alterations to the case, with the submitting author's participation. Also, before publishing can proceed, all legal documents must be signed and submitted (see **Figure 2**).

Figure 2
Legal and Tax Documents Required for Publication with Globalens

Release forms (only one of these forms should be submitted)

- Company Release: Required if primary sources within a company are used—a company representative must sign
- Review: Required if only publicly available materials are used—the author signs

Copyright License

- There are several versions of this form depending on the number of authors

Student Author Release

- This form must be filled out if students wrote the case

Tax Forms (one of these forms should be submitted)

- W9 Tax Payer Certification Form for accounting purposes—signed by the author
- W8 Certificate of Foreign Status for accounting purposes—signed by the author

Editing

Once the case is deemed ready for publication, the author's corrections should be limited to typographical, grammatical, and formatting edits. During the editing process some clarification of details, more precise sourcing, or other information may be necessary. After the case is edited, the author will get a chance to review the edits and make any last-minute corrections.

Formatting

In this step the case is placed into a desktop publishing software program and is no longer available in Microsoft Word. The author will see one final proof, a PDF version of the formatted case. Corrections at this stage are limited to typographical, grammatical, and formatting errors. A "proof signoff" will accompany the PDF, and must be signed before the case can be posted on GlobalLens.com. If revisions are necessary, a second proof will be provided to the author.

Posting the case

Once a case is final-approved in the formatting step, it is posted on GlobalLens.com and available for purchase. Professors who are registered on GlobalLens.com have access to a digital watermarked version of the entire case and teaching note. Unregistered users have access only to the first page of the case. A purchase is required to access a version of the case that is not watermarked.

Permissions

Anytime a case is to be used, permissions need to be purchased before the case may be copied. This can be done through GlobalLens.com. A purchaser can buy any specific number of copies, submit payment, and make that number of copies.

GlobalLens Style Details

GlobalLens adheres to MLA style.

Cases are written in past tense, even when the writer is describing a present-day situation. This is because professors and students will use case studies for years to come. Some case studies have been used for over 30 years. So, even if something about a company appears everlasting at the time of writing, when the case is read a few years later, the reality may be quite different. (Consider how ludicrous it would be to read an Enron case in present tense today.) With discussion, writers can make exceptions to the use of past tense, but these changes must be made intentionally. Sometimes present tense can be effective to set the scene at the case's beginning. If so, the final paragraph that reiterates the decision point probably should also use present tense.

Simple past is preferred over other forms. For example, "Mansfield Plumbing Products was founded in 1924," not "Mansfield Plumbing Products had been founded in 1924." Even better would be "Robert Mansfield founded Mansfield Plumbing Products in 1924." GlobalLens prefers active voice in case writing.

Avoid using judgmental introductory statements, such as *clearly*, *obviously*, or *of course*, to avoid reader frustration.

Endnotes are referenced in the text itself and numbered consecutively with standard superscript. The list of endnotes appears at the end of the case. If a case needs a footnote to clarify a point, it should appear at the bottom of the page where it is referenced and use roman numerals.

Bylines/credits

In published form, the names of the case writers appear in an italic sentence at the bottom of the first page. For example:

This case was prepared by research associates Nancy Drew and Perry Mason under the supervision of Professor Robert Einstein at the University of Michigan's Ross School of Business.

Exhibits

Exhibit 1
Learning-Centered Teaching

The primary advantage of learning-centered teaching over instructor-centered teaching is that when the focus becomes student learning, colleges attain higher rates of student retention and better prepare graduates to apply learning to real world environments (Matlin, 2002; Sternberg & Grigorenko, 2002).

Learning-centered teaching is increasingly being encouraged in higher education. Learning-centered teachers do not employ a single teaching method, but emphasize a variety of methods that shift the role of the instructors from transferring information to facilitating student learning.

Historically, instructors focused on lecture delivery, not on student learning. This instructor-centered teaching emphasis often created a passive learning environment where students did not take responsibility for their own learning. In contrast, learning-centered teaching directly focuses on student learning.

Educators commonly use three phrases with this approach:

- *Learner-centered* teaching places the emphasis on the person who is doing the learning (Weimer, 2002).
- *Learning-centered* teaching focuses on the process of learning. This appeals to faculty because it identifies their role in the learning process.
- The phrase *student-centered learning* is also used, but some instructors steer clear of the phrase because it appears to have a consumer focus (Blumberg, 2004).

Research supports the implementation of learning-centered approaches.

An American Psychological Association task force integrated this research into 14 learning-centered psychological principles summarized in the following five domains (Lambert & McCombs, 2000; Alexander & Murphy, 2000):

1. **The knowledge base.** The conclusive result of decades of research on knowledge base is that what a person already knows largely determines what the person determines to be important or relevant, how the person organizes new information, and how the person filters new experiences (Alexander & Murphy, 2000).
2. **Strategic processing and executive control.** The ability to reflect on and regulate one's thoughts and behaviors is an essential aspect of learning. Successful students are actively involved in their own learning, monitor their thinking, evaluate their learning process, and assume responsibility for their own learning (Lambert & McCombs, 2000).
3. **Motivation and affect.** The benefits of learning-centered education include increased motivation for learning and greater satisfaction with school. Both of these outcomes lead to greater achievement (Johnson, 1991; Maxwell, 1998; Slavin, 1990). Research shows that intrinsic motivation, personal commitment, confidence in one's ability to succeed, and a perception of control over learning lead to higher achievement (Alexander & Murphy, 2000).

4. **Development and individual differences.** Individuals progress through various common stages of development, influenced by both inherited and environmental factors. Depending on the context or task, changes in how people think, believe, or behave are dependent on a combination of one's inherited abilities, stages of development, individual differences, capabilities, experiences, and environmental conditions (Alexander & Murphy, 2000).
5. **Situation or context.** Theories of learning that highlight the roles of active engagement and social interaction in the students' own construction of knowledge (Bruner, 1966; Kafai & Resnick, 1996; Piaget, 1963; Vygotsky, 1978) strongly support this learning-centered paradigm. Learning is a social process. Many environmental factors, including how the instructor teaches and how engaged the student is in the learning process, influence what and how much students learn (Lambert & McCombs, 2000). In comparison studies between students in lecture and active-learning courses, there are significantly more learning gains in the active-learning courses (Springer, Stanne, & Donovan, 1999).

Exhibit 2
Two Kinds of Case Studies

	A business case study ...	An academic case study ...
Scope	Is very narrow in scope, examining one decision point through the eyes of a protagonist (business leader). Often, the decision to be made is not immediately apparent to the readers and is not the one seemingly presented in the case introduction.	Can have a very broad scope. It is an in-depth investigation of a single individual, group, or event to explore causation in order to find underlying principles.
Point of view	Has a clear point of view – the protagonist -- which often adds a bias to the case. This is also viewed as a puzzle to be solved by the students.	Is academic in nature, and seeks to present a detached point of view with no bias.
Research type	Can use either primary or secondary sources. Often the case writer has a point of contact with special knowledge of the decision point. Having contacts in the company usually results in more authentic (and interesting) cases.	Is normally based on primary research done by the author.
Decision point	Has a finite decision point at a fixed time.	Has no decision point.
Learning objectives / teaching points	Has concrete teaching objectives that specify exactly what students should know after finishing a case analysis and in-class discussion. These should be written in bullet points. Typically, a case will have 2-5 teaching objectives that support one core business principle.	Does not have teaching points, but is normally guided by hypotheses that are tested by analyzing the data gathered.
Teaching note	Normally needs to be accompanied by a teaching note that: - helps check the completeness and logic of the case study, and - provides a guide to other instructors on how to teach the case in the classroom. There are five seven major sections of a teaching note: - Case Overview - Teaching Objectives - Pedagogy - Case Analysis - Assignment Questions - Teaching Plan - Conclusion	Does not normally have a teaching note.
Supporting information	Contains relevant documentation referred to in the case as "exhibits." These are such items as financial statements, timelines, short biographies, and multimedia supplements (such as video recordings of interviews with the case protagonist). These data are often not analyzed and are based on the information available to the protagonist. They can help the students analyze the case study.	Is incorporated into the paper as charts, tables, or appendices. These are normally representations of data analyzed by the researcher.
Conclusions	Stops short of drawing conclusions. This allows the students to discuss the potential courses of action and results of the decision to be made by the protagonist.	Has a "conclusions" section that summarizes the findings of the case study.

Exhibit 3
Characteristics of problems that are presented in the best case studies

Characteristic	Description
Problem formulation	Has no definitive formulation
Problem/solution relationship	Every formulation of the problem corresponds to a statement of solution and vice versa Understanding the problem is synonymous with solving it
Testability	There is no single rule or system of criteria that determines whether the solution is correct or false Solutions can only be good or bad relative to one another Errors are difficult to pinpoint
Finality	There is no rule for when to stop There is always room for improvement Since there is neither an immediate nor ultimate test for the solution to the problem, one never knows when one's work is done, and the potential consequences of the problem are played out indefinitely
Tractability	There is no definitive list of permissible operations to be used for solving it
Explanatory characteristics	Many possible explanations may exist for the same discrepancy Depending on which explanation one chooses, the solution takes on a different form
Level of analysis	Every problem can be considered as a symptom of another problem The problem has no identifiable root cause; curing symptoms does not cure problems; one is never sure the problem is being attacked at the proper level
Reproducibility	Each problem is a one-shot operation Once a solution is attempted, you can never undo what you have already done There is no trial and error
Replicability	Every problem is essentially unique
Responsibility	Because there is no way of knowing when the problem is solved, few people are praised for grappling with it The problem solver has no right to be wrong, is morally responsible for what happens, and must share the blame if things go wrong

Adapted from Mason and Mitroff, 1981, pp. 10-12

