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TED UNIVERSITY

A case-writing workshop with social entrepreneurs

02-03 November 2023

TED Üniversitesi Sosyal İnovasyon Merkezi
Ziya Gökalp Caddesi 06420, E Blok Kat:2 Çankaya / ANKARA

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TED UNIVERSITY

***Session One: Teaching Social Entrepreneurship
Professor Robin Bell***

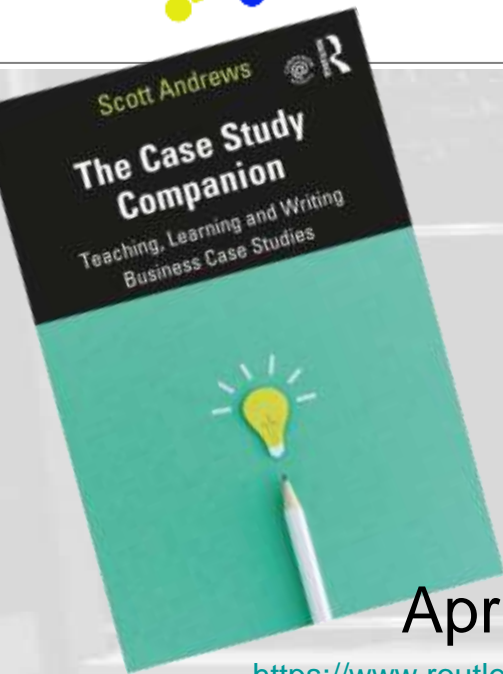
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Session Two: Introduction to Case Writing
Dr Scott Andrews

April 2021

<https://www.routledge.com/9780367426965>



Sept 2023

<https://www.routledge.com/9781032386324>

<http://cat.ba.metu.edu.tr/en/cat-resources>

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What scholars around the world say about the case method?



“The case method is not only the most *relevant* and practical way to learn managerial skills, it’s *exciting and fun*. But it can be confusing if you don’t know much about it” **Harvard USA**, Hammond, 2002

“The style of a teaching case is vivid, realistic, and convincing. It compels students to take the role of the decision maker in the organization, think as if they were him or her, and be analytical and creative.”

Case Development Centre, The Netherlands,
Yue, 2016



What is a case?



“Cases are to management students what real bodies are to medical students – an opportunity to practice harmlessly.”

Richard Ivey School of Business, **Canada**, 2007

“A case study is a distinct literary form. It is obviously not a poem. It is not purely a narrative, but it has important elements of narration. In is not purely an exposition. It is not just argumentation, but it may have important elements of argumentation. It is not just fiction, but it may have important elements of a detective story”

McNair, **Harvard**, 1971



Research Case vs Teaching Case



- Source RSM Case Centre

Research case

description
explanation
faithfulness
chronological
no perspective(s)
little or no drama


Teaching case

story
embedded in the story
often twisted and highlighted
not always
protagonist(s)
preferring drama and controversy





It starts with a story.....



“*Stories matter. They are where we lose ourselves in order to risk other possibilities, where we can escape and play, or confront and confess. We do not listen to stories; we join in and in accompanying the players of that story we meet many sides of ourselves that we can take back to our lives when the playing is over. But good stories need to be told well if they are to envelop us. Flair, humour, truth and insight are all tools that must be well honoured*”

The Sunday Telegraph

Clark, 1996

Critical considerations



- Who is to do the learning
- What is to be learned
- How is it to be learned
- Where and under what circumstances is the learning to take place



What makes a good case - IMD?



- It fulfils **pedagogic objectives**
- Tackles a relevant important issue
- Has a personal touch
- Provides currently useful generalisations
- Contains contrasts and comparisons
- Has the data required to tackle the problem, but not too much
- Is controversial
- Is short
- Is well structured and easy to read



Most popular global cases....



- Cases with a simple and clear focus
- A hot topic with broad relevance
- Shorter cases (10 pages or fewer)
- Cases about emerging economies
- Cases with teaching notes that also have concrete assignment questions or exercises
- Role plays and exercises (instructions have to be very clear)

Employability Skills



Case studies can provide practice in:

- Analysis and critical thinking
- Decision making
- Judging between courses of action
- Handling assumptions and inferences
- Presenting a point of view
- Listening to and understanding others
- Relating theory to practice

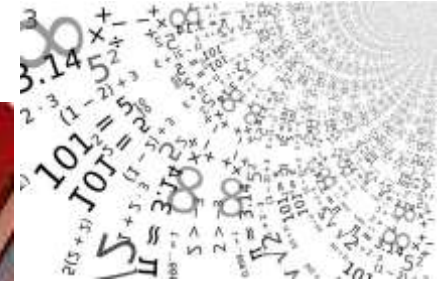


adapted from J.Heath (2015)

Types of Case Study



- Incident case
- Background case
- Exercise case
- Situation case
- Complex case
- Decision case



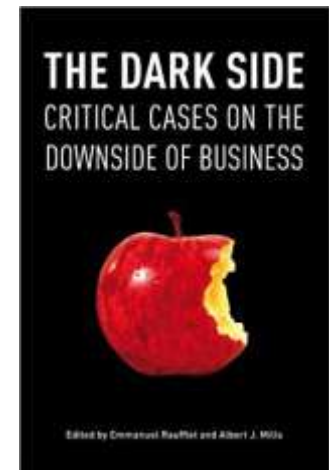
Types of cases - the dark Side



- ‘Dark side’ case:

Emerged from the Critical Management Studies Interest Group (CMSIG) at the Academy of Management and has grown to become a regular annual competition.

“When we want to talk to our students about the more typical cases, let alone the really scandalous practices of the worst firms, the cupboard is almost entirely bare. It's almost impossible to even find a reasonably rich case on a labor/management conflict.”



Adler, University of S. California, quoted in Raufflet and Mills, 2017, p.4

Types of cases – live cases



“In a typical live case, a leader or team from a local company visits the classroom and presents a business problem the organization is facing. Students are then tasked to develop solutions. Sometimes they do so in a consulting team throughout the semester and then present their solutions to the professor, their classmates, and company representatives.” **USA**

Rapp and Ogilvie, 2019

“Live case studies [are] an approach that has wide currency in business education and as a method where students are emotionally and behaviourally involved in experiential learning.” **Australia,**

Schonell and Macklin, 2018

Case Opener’s no.1 – Amazon.com



“

“The debate in the executive classroom had raged for over an hour, despite the end-of-term Christmas party in full swing just down the corridor. All the other classrooms in the London-based business school had emptied out long ago, as the participants rushed to the party, or to do their last minute Christmas shopping. But not the class debating the strategy Jeff Bezos, founder and CEO of Amazon.com one of the flag bearers and icons of the e-commerce era, had used to achieve success so fast since he had created the company in 1995.”

”



Case Opener’s no.2 – Unilever in Brazil



“

“After three successful years in the Personal Care division of Unilever in Pakistan, Laercio Cardoso was contemplating an attractive leadership position in China when he received a phone call from the head of Unilever’s Home Care division in Brazil, his native country. Robert Davidson was looking for someone to explore growth opportunities in the marketing of detergents to low-income consumers living in the Northeast of Brazil. An alumnus of INSEAD’s Advanced Management Programme, Laercio had joined Unilever in 1986 after graduating in business administration from Fundação Getulio Vargas in São Paulo. He thus had the seniority and marketing skills that were necessary for the project. More importantly, he had never been involved in the traditional approach to marketing detergents and, having witnessed the success of Nirma in India, he was acutely aware of the threat posed by local brands targeted at low-income consumers.”

”

Case Opener's no.3 – Hard Choices: Best Buy and Five Star in China



“*In late February 2011, major Chinese business journals and newspapers published a piece of astonishing news:*

On February 22nd, 2011, Best Buy announced the closure of eight Best Buy branded stores in China and its retail headquarters in Shanghai. However, Five Star Appliances, a brand acquired by Best Buy in 2006, would continue its business. Many suppliers and customers were surprised to read the news and came to Best Buy-branded stores to find out what happened. Best Buy staff, who felt deserted when Best Buy announced the closure of the stores without any prior notice, protested by requesting Best Buy to ‘give me a job and compensate for my lost youth.’

On February 24, Best Buy decided to reopen four stores, with two in Shanghai and another two in Suzhou and Henzhon respectively, to deal with follow-up issues for a month. Nonetheless, the stores were flooded with customers and scuffles broke out between customers and staff. Therefore the reopening of the four stores had to be postponed.”

”

Case Opener's no.4 – Crisis at the Mill: Weaving an Indian Turnaround



“ “Phone call, November 2010: [SEP]

To: Sankar Krishnan, Managing Director at the global professional services firm Alvarez & Marsal (A&M)

From: Steve Cohen, Managing Director of Alvarez & Marsal's North American Commercial Restructuring practice

Steve Cohen: *Sankar, I've just received some worrying news from Sapphire Capital (SC). You know the firm? It's one of our large US-based distress private equity fund clients. We have advised them on several engagements. One of their Indian portfolio companies has some serious issues. It seems the top management may have been involved in some irregular activities and the company is in a crisis. That's all the information I have at the moment, but they seem very nervous.*

Sankar Krishnan: *Yes, I know SC. This sounds serious. We need to organize a call with the fund and with Nikhil to discuss what steps we should take next. Nikhil is on vacation with his family, but from the sound of it we can't wait. Let's speak tomorrow at 8.30am. I'll call Nikhil if you can organize getting the SC people together?”* ”



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April 2021

**Session Three:
Developing a Good Case Teaching Approach
Dr Scott Andrews**



Sept 2023

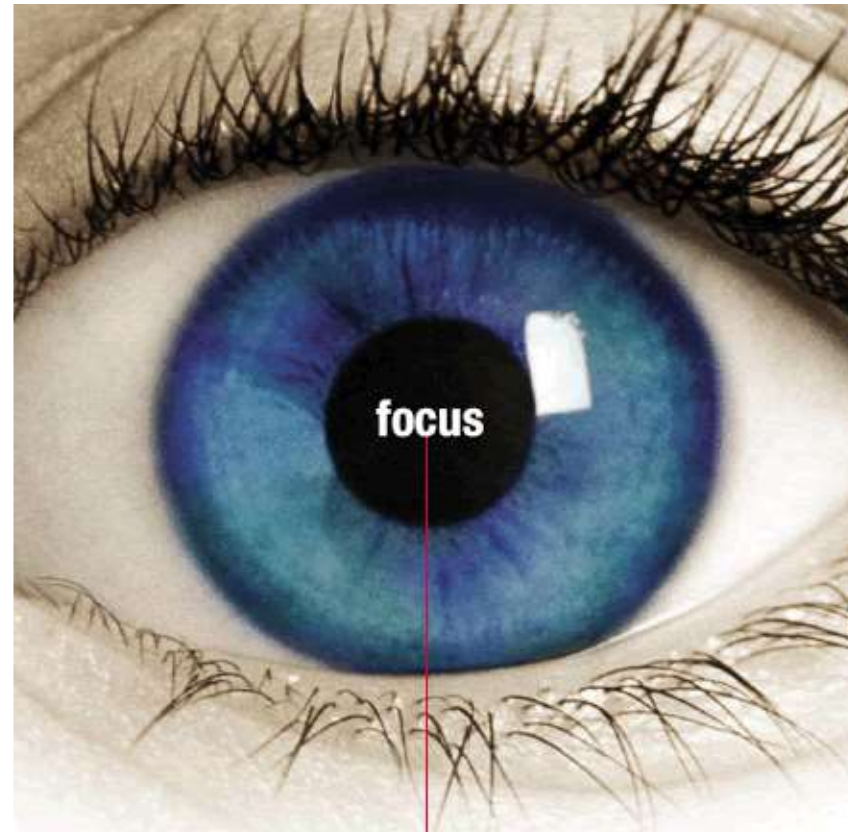
<http://cat.ba.metu.edu.tr/en/cat-resources>
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So what is the focus?



- Leadership?
- Management?
- Branding?
- Quality?
- Decision making?
- Stakeholders?
- Strategy?



Sources of case data



- **Armchair cases**
Based on the writer's own experience
- **Desk research**
Based on company reports, newspaper or magazine articles, television programmes
- **Field research**
Based on interviews and/or observations in the host organisation



Case writing according to McNair



- **Create interest** and

“a willing suspension of disbelief”

- **Case structure**
 - Time structure
 - Narrative structure
 - Plot structure
 - Expository structure



Time structure



- *chronology, historical sequence*

- Make it clear when case events occurred.
- Avoid the present tense (unless in reported speech).
- Avoid words such as *this year, currently, recently*. Use actual dates instead.

Source: Heath (2015)

Narrative structure



- the flow of events in an unfolding story

The first task in writing a case is to tell a story, to present an interesting and readable account of the events and circumstances of the case situation.

Source: Heath (2015)

Expository structure



- disclosing, unearthing and communication of information

- Provide opportunities for discovery.
- Decide how explicit you need to be for the target reader group.
- Do not over-estimate the reader's knowledge.
- Do not under-estimate the reader's intelligence.

Source: Heath (2015)

Plot structure



***- the clash of people and ideas
the elements of drama within a case***

There is usually a central theme or issue - the main storyline or plot - together with a number of subplots that have some kind of impact on one another.

These typically concern the actions and motivations of the “actors” in the case situation.

Source: Heath (2015)

Writing the case



Suggestions:

- keep the case writer out of the case
- opinions may be more important than facts
- check all verbs and adjectives for the impression they convey



Consider:

- choice of words
- sentence length
- use of quotations
- change of pace
- degree of repetition
- means of representing data
- Internal consistency
- emphasis

Adapted from: Heath (2015)

The written case - the classic form



In the first paragraph you make a statement about the issue which must be decided in the company.

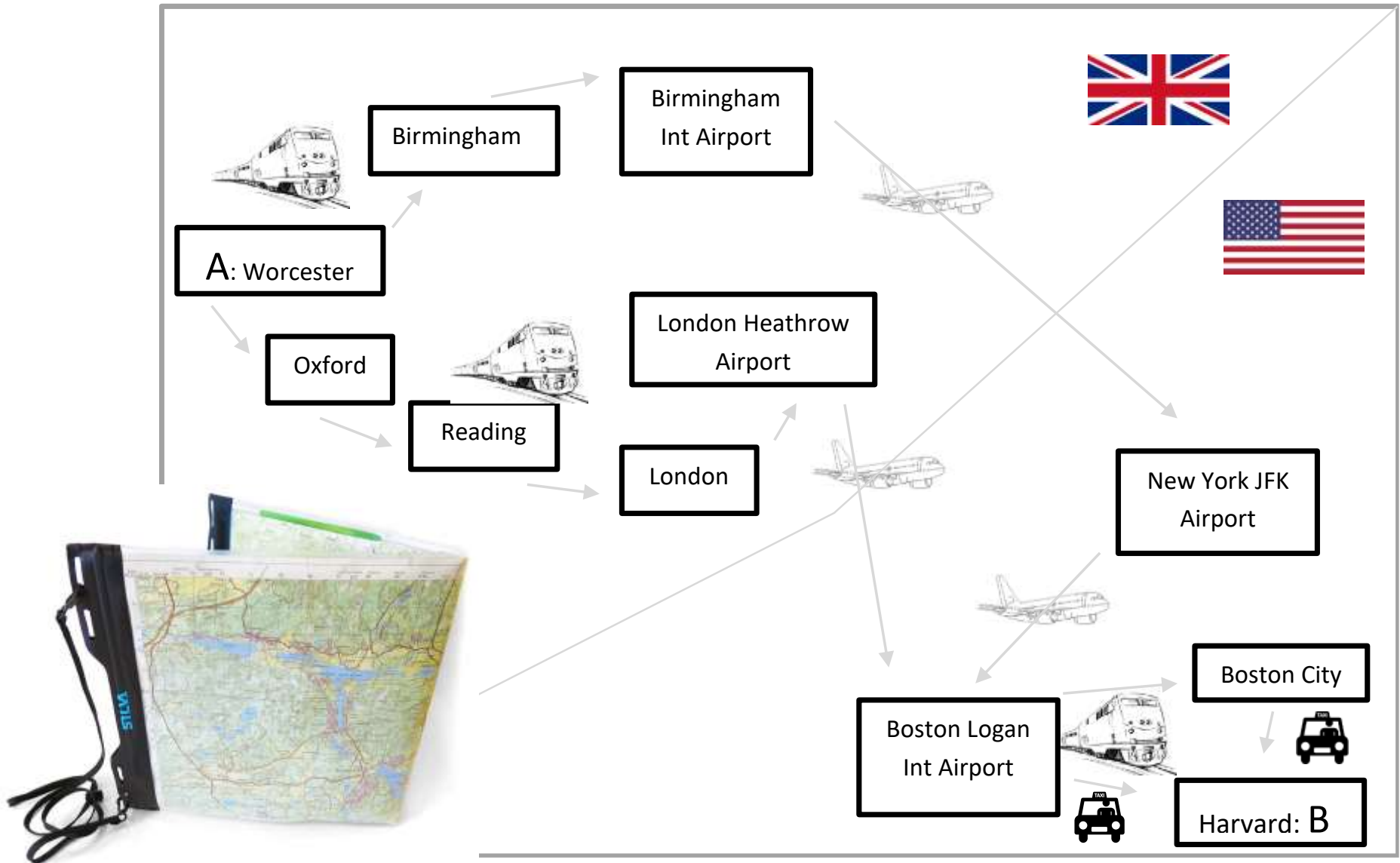
In the second paragraph you give a little background about the company and its place in the industry.

In the third paragraph you tell how the situation requiring action developed.

Then, as needed material is available, you give additional data about the way management handled earlier events leading up to the issue, and the data from which alternative courses of action might be visualised.

You carefully leave out of the case your own opinions and evaluation.

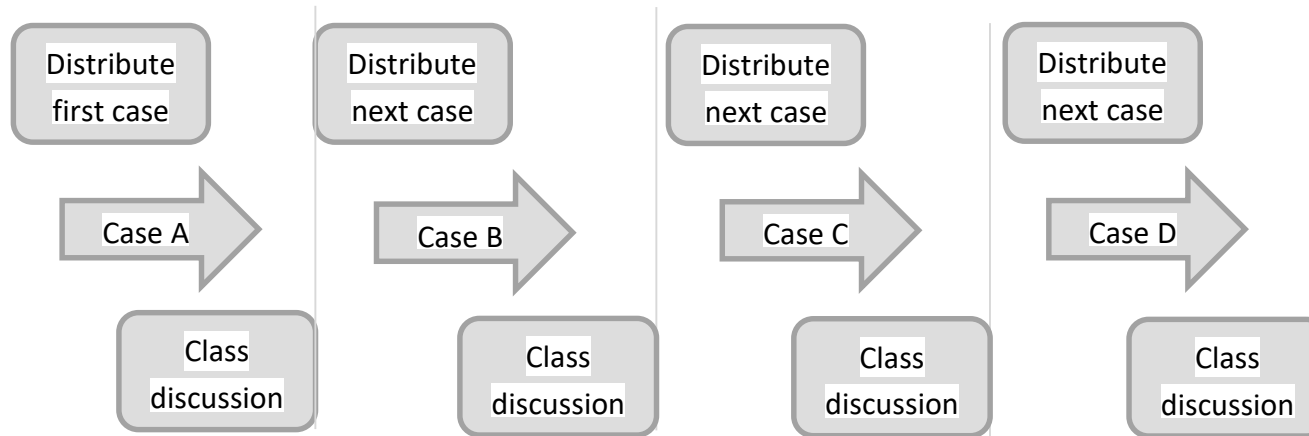
Case delivery: Mapping a journey



Presentational formats



- Single text case
- Sequential case



- Multimedia case
- Simulation case

Bestselling cases in 2022

Discover the key figures behind the cases that sold the most copies in 2022.

Authors & schools

258



Authors

from

42



Schools

in

14



Countries

Most featured author
Debapratim Purkayastha



Most featured school
Harvard Business School



Most featured companies



The cases

93%

with a
teaching note

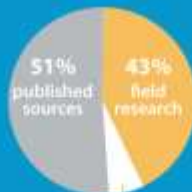
Publication date



36%

with a
translation

Data source



generalised experience

15%

with
video/software

Length



1-5 pages

Featured industries



Find out more

See full details of the bestselling cases, and discover more about previous bestsellers:

www.thecasecentre.org/bestsellingcases2022

Engaging the learner

Talk to me and
I will listen

Show me and
I will observe

Involve me and
I will learn

**The
Guardian**
Newspaper of the year

Fifa investigating how chef Salt Bae got
on to World Cup final pitch

Influencer and restaurateur Nusret Gökçe seen pretending to
sprinkle salt over trophy and celebrating with Argentina in
defiance of strict rules on access



Look at the NusrET case study



1. As you work through the case, outline key components that highlight it's:
 1. Chronological (time) structure
 2. Expository structure
 3. Plot structure
 4. Narrative structure
2. Consider the types of questions that could be raised in class if this case were to be used with management students
3. Plan a potential case teaching plan using the template supplied



Case teaching plan

Case title: _____ ← **Data - Map - People** → Target learner group: _____

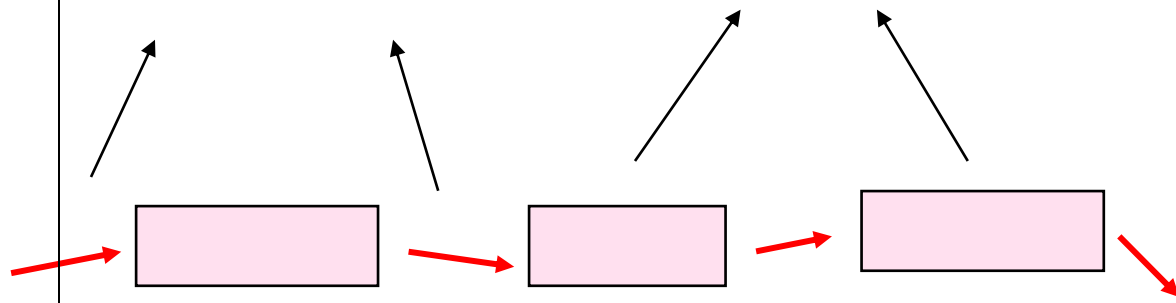
Class prerequisites

Carefully crafted questions – directing

Interesting visiting points – analysis

Key learning objectives

Starting point



Destination point

Orientation and mode of treatment of the case _____



Case teaching plan

Case title: NusrEt

Data - Map - People

Target learner group: MBA/UG Mkt

Class prerequisites

- familiarity with the brand
- Brand strategies

Starting point

Carefully crafted questions – directing

- how is awareness created?
- how performance/quality perceptions are formed?
- The attitude towards the brand?
- Being a symbolic brand?

Interesting visiting points – analysis

- concept of personality branding
- brand resonance model
- symbolic branding strategies

Key learning objectives

- evaluate the model adopted by Nusr-Et to deliver a sustainable steakhouse restaurant chain

Destination point

Orientation and mode of treatment of the case Consultant
Inductive – applying known symbolic branding strategies

What do we need to do to make this work?



1. Listen carefully and take notes, asking for clarification where needed
2. Where are the likely problems/challenges that are going to be useful for a class case study?
3. Cases that work well are those which give the student task(s) to achieve:
 - a. A decision to make (from more than one option)
 - b. Data to analyse
 - c. Recommendations/proposals to make
 - d. Potential to apply management theory
4. Consider what further information are you going to (a) need, and (b) desire to make this a viable case study for learning.
5. At least one 'host' per table should take the notes and collate the information



Case Data Dashboard

Case title: _____ ← **Title - Data - People** → Target learner group: _____

Key themes of the story

Tasks for the student to undertake

How does this connect with theory?

Key learning objectives

Key characters of the story

What data is available?

What extra information is needed?

Other notes

Orientation – what role does the student play _____

References



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