TEACHING CASE GUIDELINES

ULYSSES

DIGITAL STUDENT COMPETITION ON FAMILY BUSINESS

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1. INTRODUCTION

A teaching case is a snapshot of a management situation which presents a problem, a challenge or an opportunity faced by an organization.

A good teaching case has two components: a sharp focus (students have to understand immediately the situation and what they are expected to do) and an interesting story (setting, actors with their perspectives, elements such as a conflict or a critical dilemma).

The clues to resolving the case issue are in the text hidden. So, students can come up with solutions for the case study basing on analytical tools and on the information provided in the case. The purposes of the case must be clear from the beginning. It would thus be useful to make a list of the teaching objectives and another list of several key discussion questions with analytical tools that can help answer these questions. A list of relevant readings might be helpful for better understanding and solving the case.

The purpose of the case study needs to be situation-specific and concrete, relating to a managerial challenge which has an immediate importance. The solution provided to the specific case can then serve as a general lesson on how to approach issues of similar type. It is good to finish the opening section with one or two key questions facing the protagonist. A good opening section is brief, direct, and has a dramatic effect that can serve as a "hook" to motivate the student to be actively engaged to find a solution.

The decision maker in a case study is the protagonist. A protagonist can be for instance a manager or an entrepreneur that allows to examine the situation from a particular person's perspective, thus creating an identification of the reader with the organization and the urgency for problem solving.

There needs to be an element of tension, for example a disagreement between stakeholders, a conflict of interest or personality clash between decision makers. In the opening sections, there have to be a couple of paragraphs, serving to explain ***who*** the protagonist is (name and position in the firm), ***what*** kind of decision she/he has to make, ***when*** and ***where*** this is happening, ***why*** and ***how*** this would happen.

2. DATA

A case study must include a significant issue to be analyzed, sufficient information from which to propose a solution for the issues that were identified, and no started solution. When introducing the industry and organization background in a teaching case only the most relevant information for the protagonist to take a decision should be included. Figures, tables, and exhibits are helpful to economize the text and give a direct impression of the facts.

Most case studies have a mixture of primary and secondary sources to help capture the spirit of the protagonist. While most of the background information can be gathered from secondary data (web, press, etc.), to write an effective case, it is fundamental to make some interviews and get some unique insider information.

When proposing to an organization to support in developing the case study, they might want to know what benefit can they gain from cooperating. There are three main kinds of benefit that they can expect:

- **Image return**: if the case is widely used in Universities, it could be indirectly a way to publicize an organization.
- **Improve organizational learning**: an organization can use the case to reflect on its effective or ineffective practices and decisions.
- **Revise managerial decision-making processes**: a case can provide an external view of a complex issue, which helps management to make difficult decisions.

The organization would also expect that the exclusive information they provide you will not be used against their interest. You can then propose signing a non-disclosure agreement to guarantee your good conduct.

You need at least two interviews with one or more individuals within the company. Having two or more interviews helps to triangulate the data, clarifying points and ask in-depth questions following the previous interview. It is advisable to voice record every interview and to not wait for too long to transcribe the recording, in order to not lose the fresh impression after the interview.

In most cases, once an initial agreement is established, the organization will not object to the case being released. But in the case that they decide to withdraw their permission to publicize the case after they have read the case, you can propose to disguise the identifying information to make the organization anonymous.

3. WRITING STYLE

The case study has to focus on some complexities of decisions that are encountered within organizations, so helping in bridging the gap between theory and practice. A teaching case reflects the ambiguity of the situation and need not have a single outcome, as the intent is to create a dialogue with students, encourage critical thinking and research, and evaluate recommendations.

Teaching case studies are written in the third person, in the past tense and establish an objectivity of case study core dilemmas. The case writer should remain objective and let readers draw their own conclusion. In writing the case study, it is important to identify and establish the central protagonist and their dilemma in the first paragraph and summarize the dilemma again at the end of the case. From the beginning, a case has to have a "hook", i.e. an overriding issue that pulls various parts together, a managerial issue that requires urgent attention. Including all information required to answer the questions posed is fundamental. Additionally, evidence pertaining to internal and external environments and stakeholders require rich information.

The language of a case should be clear, direct, and concise. Use quotations as they are a powerful tool in case writing. It is also important to tell the story in chronological order and by using the past tense. Avoid words like "currently" and "presently" in order to make the case study remain relatively timeless. For instance, it is better to write: "Firm A decided to expand internationally in December 2022" rather than "Firm A is expanding internationally". The style writing in a teaching case is thus very different from an academic research case study. Table 1 summarizes the main differences between the two.

Table 1. Differences between teaching and research case study.

A research case study	A teaching case study
Describes an organization or its decision-making process.	Tells a story with a decision focus.
Explains or analyses organizational decisions.	Offers no obvious explanation or analysis.
Is faithful to "truth" or "the fact".	May contain selected and simplified information.
Is mostly written chronologically with little personal touch.	Can be written with flashbacks and should have actors, perspectives, and drama.

4. FINAL BULLET POINTS

How to write & structure a case

- Write in the past tense.
- Identify and establish an issue/problem which can be used to teach a concept or theory.

Common pitfalls:

- The case has no clear decision focus;
- The case has many decision foci;
- The case has no clear structure;
- The case is not objective;
- The case offers a diagnosis of the problem or issue;
- The case provides little context;
- The case provides too many details;
- The case has no actors;
- The case has no dramatic interest;
- The case is too dramatic with complex sub-plots;
- The case is too technical or theoretical.

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