

## HOW TO WRITE A CASE STUDY

by

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There are two types of case studies: (1) factual ones depicting real organizations, people, and situations and (2) fictional ones that, although usually based loosely on actual people and events, do not use real organization's or people's names.

The advantages of factual case studies are that they can provide a wealth of detail, give credibility to situations and problems, and, most important, provide real outcomes. Actual results give those who analyze a case real-world solutions: How did the organization or manager solve the problems? Did the solutions work?

Although factual cases furnish concrete, not theoretical, solutions, they also have some drawbacks. Often students or case discussants get hung up debating the details of the case as they may remember them. Some discussants claim inside information or refer to later outcomes that bring the organization's solutions into question. When discussing factual cases, analysts tend to focus on the accuracy of the details rather than on the appropriateness of the solutions. Factual cases tend to become outdated as organizations, strategies, problems, and people change over time. Also, if a factual case portrays real organizations or people in a negative way, questions of taste, fairness, and even libel can arise. Finally, in a factual case writers must obviously stick to the facts, which means that they are limited to dealing with only those management topics that are implicit in the case.

The most effective use of factual cases are for describing current organizational problems, then analyzing and attempting to solve the problems using a consultative approach.

Fictional cases have the drawback that students can never know if a solution worked or not. Fictional cases are theoretical ones, and thus often do not have the credibility that factual ones do. On the other hand, fictional case writers are not constrained by the facts. Case writers can exercise their poetic license and embellish on problems, issues, situations, and people in order to focus only on the problems they want to address.

Often the best solution for teaching is to write fictional cases that closely parallel factual situations.

## Case Study Organizing Tips

Before beginning to outline a case study, writers must decide on less than six dominant problems. Case writers must ask, "What is this case study about?" Each problem (topic meant for discussion) should be written in the form of a simple question (For example: What types of sales goals are effective?). If it takes several sentences to ask a problem-defining question, then it is too complicated and not likely to be recognized or understood by readers. If there are more than five problems in a case, readers are apt to become confused and fail to focus on the important problems the writer intended to address. A case study with more than five problems is difficult to discuss in a practical amount of time (a class period, for example) and apt to require many hours of rambling discussion. If the situation being studied contains more than five problems, then the case study should be written in several sections. Each section, in addition to being a continuation of the narrative, should be able to present possible solutions to the problems (answers to the questions). (For example: Billing or revenue goals are not the most effective ones, activity- and task-oriented goals are better.) Many case writers may want to tie problems to topics discussed in assigned reading material. There are often multiple approaches to solving problems, several answers to the questions. However, case writers should know what the potential solutions are and have a sense of what the best solutions are.

Case studies do not have to be restricted to problems and how-not-to situations; they can show solutions and how-to situations also. A case study can address several problems and show what was done right in solving them.

Often the best teaching cases are those that contain both appropriate and inappropriate problem solutions. By using this technique, writers do not signal to readers that all the solutions are either right or wrong--case analysts have to figure it out for themselves.

The next step is to select or create situations that give readers a clear delineation of the problems and point the way to a discussion about possible solutions. The most effective way to depict a problem is to write situations or scenes that have conflict in them: scenes in which the characters have opposite points of view, disagreements, or different solutions. Each situation or scene in a case study should either: (1) carry the narrative forward, (2) relate directly to one of the major problems in the case, or (3) provide insight into the personality and motives of one or more of the characters. The ideal situation is one that the writer knows will elicit conflicting opinions about potential solutions.

## Case Study Writing Tips

1. Keep your audience in mind: Remember that you are writing for students or discussants who may not be familiar with the back- ground, details, and terminology of the situation. Keep jargon to a minimum.
2. Use short-story-writing techniques: A case has flesh-and-blood characters who should be intriguing. Each story element should move the narrative forward.
3. Openings: Grab the reader with a character facing his or her biggest problem: set the scene for the confrontations, the frustrations, and the main conflicts.
4. Present situations and scenes without any attempt at analysis: Scenes must follow a logical order and should illustrate a point, concept, or issue that relates to the problems that the writer wants to have analyzed. Do not give any signals that one solution might be preferred.
5. Provide relevant details: After an opening that sets up the situation, provide relevant details about goals, strategies, dilemmas, issues, conflicts, roadblocks, appropriate research, relevant financial information, people, and relationships. Be stingy with numbers; they must help solve the problems, not confuse readers or send them off on unproductive analytic tangents.
6. Use as much dialogue as possible: Make the characters come alive with dialogue. Straight narrative is boring.
7. Endings: Leave the reader with a clear picture of the major problems--either ask or imply "what is to be done now?"