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# CHAPTER 3

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## Case Writing Process: Before you Start

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### Learning Objectives

*After completion of this unit, the students will be aware of the following topics:*

- The Context of the Case*
- The Ethicality of Issues Addressed*
- The Cultural Specificity*
- Copyright*
- Kicking it Off*

Preparation of cases is commonly referred to as case writing (though a variety of other terms is also in use), but you should not assume that all cases consist entirely, or even mainly, of written material. Audio, visual and computer-based materials can be included and may sometimes form the great majority of the material in a particular case. We shall use the term case writing, though, to cover all the formats in which the case may eventually appear for use.

You need not necessarily write the entire case: you could find one already existing which meets your requirements; you could find one which you can adapt to meet your needs; you might be lucky enough to have some material broadcast on radio or television which you could use as the basis for your case - and so on. The possibilities are wide, but don't get too fond of the material you prepare yourself; always look at it with a critical eye and be prepared to take sometimes necessary but always hard decision to discard any parts which aren't appropriate.

Cases tend to be written in different ways and for different purposes in differing educational cultures and such bias will no doubt be evident in this monograph too.

Cases are one way of providing a simulated environment in which to practice and develop these problem-solving and decision-making skills. Being simulated, participants are under little pressure; a wrong decision has no more realistic effect than a right one, which has been a major weakness of the case method and gave rise to the live case method.

The degree of reality of cases in a simulated environment can vary depending on the technique for developing cases. As you change your methods from collection and ordering of published material; to observation; to research, or consultancy, or the live case method, the increasing amount of insights that these give you can have considerable benefits on your case writing.

Case writing can be regarded as a skill that is similar to other kinds of writing. Some form of basic structural design and shape underpins most writing, which the writer will in part follow, in part deviate from according to ability, need, or the unexpected events that go with the act of writing. Planning, though, must be a deliberate forerunner of the writing.

The main constraint generally emphasised is the need to ensure that all the material included is as factual as possible and does not include the writer's ideas, thoughts, perceptions or interpretations of events.

## THE CONTEXT OF THE CASE

The most effective cases are those to which audiences relate to most closely - with the likelihood that 'good' cases correlate well with the indignity of their content.

Case study applications may not evolve until good cases are researched and written locally. Types of problems, legislation, culture, etc., all tend to be very specific to particular regions, with the consequence that cases incorporating them are not easily transferable to other countries or cultures.

Most case writers are exposed at an early stage of their training to the comment by more experienced colleagues that the cases they write are not neutral. Because of this requirement, they attempt at all times to avoid the inclusion of any opinions, impressions, prejudices and value judgements, unless specifically expressed by a person in the case. The ultimate goal that is held as an ideal to all case-writing beginners is the so-called 'neutral' case.

## THE ETHICALITY OF ISSUES ADDRESSED

Whether the case is invented, or formed from the collation of published material, from observation, from research, or from consultancy, it is generally assumed that there is a need to maintain an objective rather than a subjective stance. As these types of derivations tend to give increasing reality to cases, the maintenance of this objectivity can cause considerable difficulty: the case also tends to become more and more culturally specific and perhaps limited in the subjects and language considered as suitable:

... .. The writers of cases are usually drawn from the intelligentsia ... .. the effect ... .. Cases which reflect humanistic values, responsible business ethics and suitably serious and complex subjects for analysis. It is only on relatively rare occasions, however, that cases are written on the subjects of alleged unethical behaviour by organisations ... or of supposed graft and corruption. However, these cases are usually written from secondary sources, with academic caution and selectivity on the issues included in the text. On issues, which are considered indelicate, such as blackmail, fraud, grossly immoral behaviour, the press assumes the role, which the case writer could perform if he wanted to portray a representative range of all the many facets of business. In addition, the language and format of cases reflects such values of high mindedness: the reality of a business deal might well be not dispassionate prose, or well ordered polished factual exposition. (Tixier, 1985)

Despite the interest that some of the above types of cases might create, they do pose especial problems for anyone who is new to case writing. The difficulties of avoiding bias, separating fact from rumour and gossip and if necessary getting

agreement from contributors to use such a case make it probably much better and simpler for you to stick to the conventional type of case.

## THE CULTURAL SPECIFICITY

It is not always easy to recognise the culture specific aspects that may creep into a case. There are at least four cultural constituents that effect the considerations in a case:

- Imputed national characteristics;
- Typical corporate values;
- Prevailing economic systems; and
- The values of the case writer and trainees themselves.

In general, the more realistic a case is, the more difficult it is to adapt or transpose into another culture - its realism is often due to its cultural depth and specificity.

There has been an increasing awareness about gender bias in written materials over the past few years. The use of artificially constructed pronouns (is/he) or duplicate pronouns (his/her) creates rather clumsy writing effects. Notes inserted at the beginning may either not be noticed or may give offence.

## COPYRIGHT

Copyright is the name given to the principle that those who create works of the intellect should have a special relationship with them, in short that they should own them as property. If those who create or produce materials can control the use which society makes of them and can, by implication, make a charge for the value which is derived from them, they will be encouraged to produce more materials and so benefit, specially, education and the arts and sciences.

There are many complicating factors in copyright law and specialist information should be obtained if you are in any doubt.

By the very nature of many of their sources, cases will incorporate materials that have been published by others and are thus protected by the laws of copyright. If you propose to include interviews and other items obtained from organisations, you will need to get clearance to use these; though all of such material may not necessarily be covered by copyright. This is advisable for both courtesy and to maintain good working relationships. We will talk more on materials for the cases in the next chapter.

The job of the case writer is a demanding one. It requires not only ability but also enthusiastic interest in the case method, plus an understanding of employment of the techniques and procedures that have proved useful in the past. The purpose of the material that follows is, so far as possible, to familiarise the new researcher with some of the proven procedures and routines and to pass along certain 'helpful hints' which may be useful.

Collecting cases, usually involves interviews with people. At times cases are written exclusively from published sources; but experience indicates that, mostly, they are not so satisfactory as cases secured in whole or in part from personal interviews. Consequently, the process of collecting cases centres on the interview and many of these comments on the case collection process naturally have to do with preparing for, carrying on and writing up interviews.

Even when cases are based upon personal interviews, however, not all the material in the final case usually is secured solely from the interview. It therefore becomes important that the young researcher be well prepared not only to get the most out of the interview but also to secure all the pertinent information from whatever source it is available.

Both the finished product (the case) and the interview (which in effect is the central core of case collection) will be better if the interview is preceded by thorough preparation and followed by efficient use of the information received.

A lot of experience is now available on techniques of case collection, some of which is given in the following sections. While these suggestions on effective techniques of case collection are addressed primarily to case-writer, they may be of interest to others who may like to know about the case method.

A thorough mental preparation is an absolute must before starting with the case collection process. The objectivity of approach and the subjectivity of purpose are delicate issues that need rigorous mental discipline on the part of the case writer.