
CHAPTER 6

Case Writing Process: Finishing Your Case

Learning Objectives

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

- Reconsider the Case Material*
- Relook at the Case Organisation*
- Refinishing the Case*
- Moment of Truth*

There is no edict, no hard and fast rule, about how long a case should be. Aim for:

- Clarity,
- Coherence,
- Completeness and
- Conciseness

In the above case, you should find that the length more or less controls itself. Case can, though, vary from one written page upwards and the longer they become, the longer it takes the reader just to absorb in the material. Where writers have given some indication of optimum lengths, this seems to be in the range of 10-15 pages - above that, the feeling seems to be that their effectiveness decreases.

Help participants to sort out the material in your case by ensuring that every item has a reference number and that a listing of all the items they should have or should refer to (e.g., a videotape which is held by the library) is included in the case paperwork. In this way, they can check that they have everything they are meant to have. You can put charts, tables, etc., in appendices rather than bulking out the main part of the case and you can indicate clearly what items they will need to refer to which are not in the main case pack and where those items are to be obtained.

RECONSIDER THE CASE MATERIAL

The choice of material for inclusion in the case is always a compromise between the voluminous information necessary to give a full picture and the comparatively brief statement that the student can be expected to digest in the time that he has allotted to the study of one case. The businessman in whose shoes the student is supposed to be placed can draw on a vast store of experience with past and present circumstances in solving his problems. The fact that this background material cannot be set forth in the case does not preclude a useful and intelligent discussion of the problem. It does result, however, in the student's sharpening his analytical powers on compartmentalised problems without considering them as parts of much larger operations. Since training in the broader area is vital for business success, the case writer introduces as much information as he can about personalities and company policies.

What quantity of irrelevant material should be included cannot be stated categorically. Certainly, it is important to develop a student's ability to discriminate

between useful and unnecessary information. Thus, some extraneous data need to be given. The student's training is most effective, however, if the volume of such data varies from considerable to none - hence the absence of any fixed policy. There is one serious risk in including extraneous material, namely, that the class may be thrown completely off the track or may never get to the main point because of the profusion of surplus information.

The use of live material, such as reports and letters obtained from company files, poses a further problem. Such material adds substantially to the reality of a case. Still, the students may have to wade through a mass of details and technicalities to get at the heart of the problem. Thus, in the interests of expedition, the case writer usually does much of the wading for the students and presents the material in condensed form.

Many cases include material, which is not part of the description of the business situation but is necessary for a proper understanding, such as a summary of share issuing procedure. The material may be in a separate technical note or an appendix or may be part of the body of the case.

RELOOK AT THE CASE ORGANISATION

The next step is organisation of the case and here again there must be a compromise between time limits and training objectives. Unless the material in a case is ordered to some degree, the students are unable to get at the meat and the resulting class discussion is quite unsatisfactory. Thus, most cases present a somewhat systematised description of the company in general and the specific aspects being considered.

Whether the statement of the case should be carried to the point of presenting the issue and discussing the pros and cons is another matter. Both the problem finding and the stated-problem types of cases have their place in the system. Cases in the latter category include two types: those in which the problem is merely posed and those in which the company's decision and the reasons behind it are given. The choice between these types is made based on the ability of the students to discern the significant issues. In the early stages of an unfamiliar course, the best strategy may be to take a complete solution and pick it apart. As their experience grows, the students develop the ability to arrive at reasonable solutions independently and the presentation of a company decision may curb their imagination.

There is no merit in having unnecessarily long appendices: the function of these is to provide necessary information which does not readily fit into the main body

of the case, but which is essential to the understanding of the case and the solving of any problems posed.

REFINISHING THE CASE

Once you have written your case, put it aside for a while - a day or two, perhaps - and then read it again. Read it critically, put yourself in the position of participants and see whether they would get out of it what you originally intended. Does it meet your objectives? Most writers find that they have to revise their original product to refine it and a second, third or fourth revision may be needed. This will pay off, though, when you try the case out for the first time, some generally accepted norms and procedures of case writing might be adhered to:

- **Use of the past tense:** Ordinarily cases are written in the past tense. This device is used in order to protect the company from which the information was received; it forestalls any implication that the facts as of one day will be the same at a later date. Experience indicates, too, that cases written in the past tense retain their usefulness for teaching longer than cases in the present tense. A little practice develops techniques of using the past tense without making all the facts seem dead. If the past tense is not used, it may be necessary to indicate that the case was written as of a specified date.
- **Tabulations:** Tabulate all data that can be presented in table form.
- **Exhibits and appendices:** Tables, charts, balance sheets, forms and maps may be used as exhibits in cases. These should be numbered consecutively in the order of their appearance in the case. Specific reference to the sources of the material should be given at the bottom of each exhibit. Material not an integral part of the case or too long for inclusion in the text may be given in appendices. Appendices are usually designated by letter ("Appendix A").
- **Checking figures and disguises:** All figures included in a case must be checked for accuracy. To facilitate checking, make it a practice to record complete and specific source references. (For instance, include exact page numbers and other details, which will enable the person checking your work to refer immediately to the same source that you used.) Source references noted on work sheets and rough drafts frequently should be more comprehensive than those, which will appear in the published version. It is essential that any disguises be completely executed so that the case is fully consistent.
- **Facts:** All relevant facts that are available ought to be included. In most instances, each case should present only the plans that the company reviewed

for the particular situation. When certain facts are not available, it is often significant to say so.

You are essentially a reporter of facts. Opinions of the writer (your) should not be included in a case. Opinions of others should be labelled as such and should not be reported as facts.

Putting yourself into the shoes of a student, you should scrutinise your case carefully to be sure that students will have no difficulty in understanding the situation.

- *Decisions:* Inclusion of decisions actually arrived at by company executives frequently adds interest to a case and helps crystallise the student's thinking. Whether decisions are to be included, however, depends largely on the use to which the case is to be put.
- *Published sources:* When an entire case, written under the real name of the company, is based on published material such as the annual reports of a company or its financial statements as reported in press, a footnote from the case title should indicate the source.
- *Reprinting:* When substantial quotations are used, permission to reprint must be secured from the publisher. Exact indication of the source, including title of article, as well as author, publisher and date of publication must accompany each quotation.

Newspaper articles, not syndicated and advertisements may be used without the formality of securing a release from the company, provided due credit is given to the source from which the material is taken.

- *Use of "Notes to Instructor":* Additional information that is not essential to the case but that the professor may want to offer the student as background material may be written up in the form of notes and filed with the instructor's copy of the case. All information pertaining to the particular situation and all the facts which are to be used in the discussion of the case should, of course, be included in the case so that the students will not feel that the teacher has an unfair advantage over them so far as facts are concerned.

Explanation of the disguise used and other "historical notes" on how the case was secured and written may usefully be included in a 'Note to Instructor'.

- *Miscellaneous:* It is a good practice to put an identifying title, your name and the date on all work sheets, notes and the like.

For your own information and satisfaction as well as for the purpose of enabling you to report on your activities you may wish to keep a list of the names of the people and companies which you visit, a copy of each of the cases that you write and similar bits of personal history.

MOMENT OF TRUTH

The decisive moment has arrived. You are now ready to take your case to a classroom and see how it works. You need to do this to see how your ideas are translated by the users. This is the time to test your case in the real arena. Be prepared to find that you are often misunderstood. Participants in your case class read things that you never wrote in your case, nor intended to write; and they fail to read what you actually wanted them to focus on. The experience can be very frustrating to a young researcher.

This is the time to take note of what is missing and what is superfluous in your case. There will be portions that would need rewriting unless you are comfortable with the meanings that the readers are drawing. Additional information may need to be added if you find that the participants are left gasping for it.

So, keep your first case short. As you and participants get practice with the technique, you can become more ambitious. Good writing is hard and needs a lot of care and this applies to writing cases as much as to any other sort of writing. Unfortunately, there is no way of improving your case writing other than by writing and then trying out, your cases.

The actual writing of a case, like all writing, is the often-tedious process of creating a description that is readable and accurate. Some ingenuity is required in seeding essential data through the body of the case, to be ferreted out by the students. The case writer has to be skilful lest the students fail to pick up the scent and miss the point of the case.

The story must also be presented without implying that the actions of the company are either right or wrong. A detached and accurate presentation is achieved only by the most careful editing. Where time permits, it is often helpful for the case writer to read the case aloud with someone else, determining that it is clear and correct in every part and makes an integrated whole. You may look to your guide and to experienced editors for help, but your friends and other case writers are excellent guinea pigs on which to test your writings.