Chapter 10

“Case Writing Canvas”: A Simple Tool for Managing Complexities of Case-Development Process

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ABSTRACT

The popularity of case-study methods in business education is constantly growing. Consequently, there is an increasing demand for publications concerning case writing and teaching, which helps business educators develop their own case studies that fit their local context. However, the process of case development remains a kind of ‘black-box’ process that requires a combination of diverse perspectives, including theory, writing, and teaching. The aim of this chapter is to review some of the most popular case-development tools and present an idea for a new comprehensive tool, i.e. ‘Case Writing Canvas’. This chapter presents this tool using an example of an actual case, and discusses its usefulness in the context of existing tools, as well as its advantages observed when used for business education in Central and Eastern Europe.

INTRODUCTION

Case study is one of the most effective tools in business education and its popularity is constantly growing. While case writing and teaching across the globe remains dominated by a small number of publishers with an established reputation, in recent years there have been a growing number of cases published regionally and locally. This trend can be attributed to the growing importance of the local context both for international and global managers who must understand local conditions, and for local practitioners who often find classical case studies presenting the American context not fitted to their needs. Growing demand for case studies presenting local context puts pressure on local business educators who are required to develop high quality cases. Since the culture of using case studies in business education that originated in United State does not have a long tradition in other countries, the main challenge for local case writers is to quickly learn how to develop high quality case studies that satisfy existing demand and demanding readers who often have experience with the best examples of case studies. To facilitate
this process, experienced case writers and publishers provide a number of guidelines and tools for case development, including checklists, editorial rules, and handbooks for case research.

In the following sections, it will be argued that existing tools, although very practical and useful, have significant limitations. As a result, case study writing for many new case authors remains ‘black-box’ process or mysterious skills. For example the majority of tools offer a stepwise checklist approach in order to give an ideal overview of how a case study should be developed and to help authors conduct a self-check before submitting the case to a publisher. This, however, does not fit the iterative nature of the case-development process, which often involves testing followed by a number of revisions, restructuring, and trimming the case content. Another challenge is that existing literature has established a clear-cut distinction between case writing and teaching following the logic of the separate development of case study and teaching notes. This however goes against the common knowledge of experienced case writers, who would argue that it is almost impossible to separate the teaching and writing perspective, and that these two should be combined to develop a good case study.

The main objective of this chapter is, therefore, to open the ‘black box’ of the case-development process and then offer a tool entitled ‘Case Writing Canvas’ to manage the complexities. The main advantage of the tool is that it offers a holistic overview of the entire case, including intended learning outcomes, storyline, and teaching methods. On one hand, the tools separate the different logics and help to maintain the clarity and rigor in the case-development process. On the other hand, the tool suggests using smaller building blocks to build each of the logics, which enhances flexibility and facilitates the introduction of multiple iterations in the process of case designing and writing. ‘Case Writing Canvas’ is a universal tool that can be used at all stages of case development, including topic selection, drafting, writing, re-writing, and even data collection.

The first part of the chapter provides a brief overview of the existing literature devoted to practical aspects of case development. The second part introduces the main assumptions of the ‘Case Writing Canvas,’ including its three logics. The third part provides two examples, one of which illustrates the application of canvas to later stages of case development, while the other provides some examples of how it can be used in the early stage of topic selection and data collection. Finally, the summary argues that the ‘Case Writing Canvas’ fits well with existing knowledge and tools for case development, facilitates the overcoming of the writing-teaching divide, and enhances all stages of the case-development process.

THEORETICAL BACKGROUND

The literature concerning case development, case writing, and preparing teaching notes is relatively rich and quite informative. Since the focus of this chapter is on case writing, the literature concerning field research and data collection will be left out of the scope of literature review. However, even within the field of case writing, the existing literature presents a number of extremely practical tools including checklists (David 2003; Gentile, 1990Naumes & Naumes, 2012), sample documents required in case development (Naumes & Naumes, 2012; Swiercz, 2000), plans and outlines (Naumes & Naumes, 2012; Yemen, 2012), hints and tips (Shapiro, 1975, 1986; Rotch, 1989; Gentile, 1990) and case-writing process flows (Swiercz, 2000). In addition to a number of articles, we review three guidebooks for case writers, which include most comprehensive collection of information and tools (Glandon Gill 2011; Naumes & Naumes, 2012; Heath, 2015). The Table 1 presents a comparative summary of different case writing