Chapter 11

Writing a Case Study:
Research Design

Anna Pikos
Kozminski University, Poland

ABSTRACT

The case method is a pedagogical tool that allows students to achieve their learning objectives through active discussion. A case study presenting a real event also allows students to link the theory to the practice. Readers learn from analysis, discussion, providing solutions, and recommendations. The case study is a form of research. And case writers are much like anthropologists who preserve the event so that others can learn what happened. There are several sources that can be used to write a case. The aim of this chapter is to present various ways of gathering data for case writing. The author also discusses the possibilities of gaining access to companies’ data, which is challenge in Central and Eastern Europe.

INTRODUCTION

Erskine, Leenders, and Mauffette-Leenders (1981) claimed that the use of case studies in management is relatively new, being predated by the fields of law and medicine. The case study method was used for the first time at the Harvard Business School in 1912. Traditionally located in MBA programs, nowadays it is a common pedagogical tool in executive and undergraduate education. MBA students learning how to run a company read hundreds of case studies about strategy problems occurring in real companies, and discuss how they would solve the issues presented (Levy, 2015). Harvard Business Publishing sells cases to about 4,000 schools worldwide, and their cases account for 80% of the case studies used (Levy, 2015). Peter Zemsky (2014) reported that the ‘case method is central to how management education has developed and remains incredibly useful. However, it does face constant challenges as participants and their environment change, things to which both case developers and instructors need to respond’. Cases from ‘anything new faculty came across’ (Mesny, 2013, p. 57) ‘have evolved into complex educational instruments, based on carefully designed research plans and intensive field research’ (Christensen & Hansen, 1987, p. 26).

Writing a Case Study

BACKGROUND

There are several definitions of case study. One of them is presented by Herreid (2006), who stated, ‘a case is a description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person or persons in an organization’. A case study is a description of a business event that happened in a real company in a real industry or in the general business world (Andrews, 1960; Blumenthal, 1991; Blunden & McGuiness, 1993 cited in Mesny 2013; Cellucci, Kerrigan, Peters, 2012). Some definitions stress that a case study is a story. This is in line with what is argued by Lynn (1998, p. 2), ‘teaching case is a story, describing or based on actual events and circumstances, that is told with a definite teaching purpose in mind and that rewards careful study and analysis’. A case study is a story with an educational purpose. It represents a particular type of storytelling. The stories are not spoken, but written, and the ‘narrative’ is interesting to a specific audience. A case study is a puzzle to be solved. Shulman (1992) acknowledged that cases are ‘occasions’ for advancing and testing theories, and, possibly, changing them as more cases presenting altered events and situations are developed.

The case study method allows participants to learn by doing, and is an important pedagogical tool in many fields of study. Case studies should encourage students to critically evaluate stories about science that they hear through the media, to have a more positive attitude about science, to understand the process of science, its imitation, and to be able to ask more critical questions during public debates (Herreid, 2006). Case study requires the reader to take the position of a decision maker and deal with the situation-specific dilemmas described in a given case study. Cases also let students integrate theory with practice (Gorton, 1987; Lipham, Rankin, & Hoeh, 1985).

The repetitive opportunity to identify, analyze, and solve a number of cases in a variety of settings prepares learners to truly become professional managers in their field of work. (Hee, 2006). Christensen (1987, p. 32) declared that ‘when successful, the case method of instruction produces a manager grounded in the theory and abstract knowledge, and more important, able to apply those elements.’ As a teaching tool, it gives students a realistic view of the business world and brings a ‘real life’ experience into the classroom, (Easton, 1982; Leenders & Erskine, 1989; Richardson et al., 1995). Students get an opportunity to apply knowledge and practice their skills in a specific setting with few consequences.

Cases can be used to follow the entire decision process from analysis through implementation. They help students understand how science works and how science knowledge is constructed (Gallucci, 2012). A case study facilitates active and reflective learning by allowing students to examine the complexity of the company or a project from multiple perspectives and to generate new ideas. (Tomey, 2003). And, one of the greatest importance, cases can be used to help readers learn how to think, plan, and reason. According to Gragg (1953), the aim of case studies is to develop analytical and decision making skills. Erskine, Leenders, and Mauffette-Leenders (1981 cited in Herreid, 1994) claim that students are developing speaking and debating skills, and are gaining a sense of confidence in themselves and relating to their peers. The case study method supports the development of critical thinking skills more effectively than other methods of instruction (Arambula-Greenfield 1996; Grunwald and Hartman 2010; Quitadamo et al. 2011). That is why cases are attractive for students who are turned-off by the traditional lecture format that concentrates on facts and content rather than on the development of higher-order thinking skills. Additionally, cases must be available to teachers across the country.
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