Chapter 12

Best Practices for Writing Case Studies

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ABSTRACT

The main aim of this chapter is to provide the reader with knowledge about best practices in writing case studies. Case studies are now widely used in many areas of education. Our special focus of this chapter is on business case studies, specifically developed for business school students. Such cases were popularized by Harvard Business School, where this is the main form of teaching. However, popular in the teaching process, writing case studies can post significant challenges, especially to first-time case writers. This chapter aims to address those challenges that may occur while developing a case study and to provide the reader knowledge about the best practices in writing case studies. The authors believe that this material can be useful for both experienced case study writers and those with no practice or prior experience. This chapter contains three sections. The first part is focused on the case study development process, covering four stages: strategic decisions, research, writing, testing and refining. The second section aims to present practical aspects of writing a good case study and best practices for case study content and the main elements of case study structure. The third section is focused on a teaching note in the case study development process. In the appendix, the authors present the checklist for developing a good case study that can be a helpful tool in the development process.

INTRODUCTION

Case studies are now widely used in many areas of education. The case study method in business administration courses is particularly associated with the Harvard Business School, where it is the main method of teaching. According to Heath (2015), Harvard Business School (HBR) introduced the case study method in the early 1900s, and the first collection of cases was published in 1921. Cases in other areas, like in medicine or law, were very largely used even before that time.

DOI: 10.4018/978-1-5225-0770-3.ch012
Cases are widely used because today’s students have to acquire not only knowledge, but also skills and competencies. Teaching with cases can help to achieve this challenging goal to provide the educational experience that will fulfil this mission. However popular in the teaching process, writing case studies can post significant challenges, especially to first-time case writers. A good case study has to have a special format and structure, and it’s very often developed with a teaching note that also has to be appropriately designed. Combining that with a specific case style and learning objectives that have to be defined can be overwhelming and challenging. In this chapter, the authors aim to address those challenges and to provide the reader knowledge about the best practices for writing case studies. This chapter contains three sections. The first section is focused on the case study development process, covering four stages: strategic decisions, research, writing, testing, and refining. The second section aims to present practical aspects of writing a good case study and best practices for case study content and main elements of case study structure. The third section is focused on a teaching note in the case study development process. In the appendix the authors present the checklist for developing a good case study that can be helpful tool in the development process.

It’s worth noting that teaching with cases is like mixing art and science. There can be a recipe for writing a good case study; however, the authors believe that teachers need to develop special skills themselves in order to be good case teachers and case writers. Gathering the right knowledge about the uniqueness of the case study method can be highly supportive and can maximize the chances of creating an exceptional teaching and learning experience.

**WHAT IS A CASE STUDY?**

A business case imitates or simulates a real situation. According to Ellet, “cases are verbal representations of reality that put the reader in the role of a participant of the situation” (Ellet, 2007a, p. 13). As stated by Vega (2013), the simplest definition of a case is a story that describes a factual series of actions that occurred in the past (Vega, 2013, p. 3). Abell (1997) points out, however, that cases differ from stories in the sense that participants can put themselves in the shoes of one or more managers portrayed in the situation (Abell, 1997, p. 2). With case study as a teaching tool, the reader is expected to make a decision or recommendation to the protagonist for a course of action to pursue, or perform an analysis of an action that has already taken place (Vega, 2013, p. 3). By focusing on the real problems, the case study method not only provides students with knowledge, but primarily helps to develop their managerial skills. Banning (2003) suggests that since the cases provide limited data and allow students different approaches for addressing case problems, students are able to practice solving complex problems in the relative safety of the classroom. This increases their tolerance for ambiguity—an important skill in a rapidly changing and information-driven business environment (Banning, 2003). In line with Ellet (2007a), good case studies provide business students with the equivalent of laboratories used for educating scientists and doctors (Ellet, 2007a). To fulfil this mission, a case must have three characteristics (Ellet, 2007a, p. 3):

1. A significant issue/issues;
2. Sufficient information on which to base conclusions; and
3. No stated conclusions.