

■ PETER T. ITTIG, Feature Editor, College of Management, University of Massachusetts, Boston

## The Art & Craft of Case Writing

by Chetan S. Sankar, College of Business, Auburn University

I first met the authors of this book, William and Margaret Naumes, at the 1994 North American Case Research Association Conference when I presented a teaching case study. The conference name badges had distinct signs indicating who were the “old bears” (experienced case writers in strategic management) and who were the “new bears” (faculty members who were just starting to write case studies in their subject areas). The authors presented a workshop where they taught us “new bears” the art and craft of case writing. The whole tone of the discussion was both inclusive and welcoming. They were instrumental in starting the case study track in the DSI conferences and disseminating many of today’s case study teaching practices.

When faculty members retire, a wealth of information about their teaching practices disappears, as their journal publications mostly document their research accomplishments. New teachers and Ph.D. students are taught extensively about research methods and about seminal articles on their areas, but when it comes time to stand up in front of a class, they are frequently simply

given a text book and left to get on with it. Very little preparation or thought is given to helping them become accomplished teachers. The academic system assumes that the newly minted Ph.D. student will somehow figure out how to be an excellent teacher by osmosis.

In this book, Naumes and Naumes break this mold by documenting their experiences in working with case studies, providing an impressive amount of relevant information to new instructors. This book is a must for those academicians who are tired of the lecture mode of teaching and want to be more “active” in their classrooms. The book not only teaches them how to develop new case studies that bring real-world issues into the classroom, it also provides many hints on how to use the case studies that are currently available. The authors provide checklists, anecdotes, examples, and research results to “hook” new case writers and get them involved in developing new case studies.

The book is also a treasure trove for those researchers who are involved in education research, stating many hypotheses that could be tested in the future and possibly lead to professional publications. These hypotheses may or may not be valid; although they are based on the extensive experiences of the authors, most have never been subjected to rigorous academic scrutiny.

In this review, I will provide a short summary of the book, then elaborate on

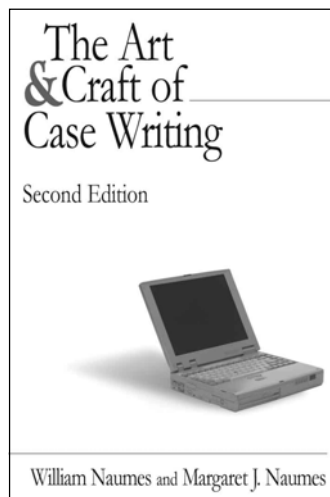


### Chetan S. Sankar

is the Thomas Walter Professor of Management at Auburn University, AL. He directs the Laboratory for Innovative Technology and Engineering Education (LITEE), which has produced 11 multi-media case studies

that are available for use in academic institutions ([litee.auburn.edu](http://litee.auburn.edu)). He has published more than 60 articles in referred journals including the MIS Quarterly, Management Science, European Journal of Engineering Education, Decision Sciences Journal of Innovative Education, Journal of STEM Education: Innovations and Research, IEEE Transactions on Education, among others. He was the 2006 Recognition Award winner from the International Network for Engineering Education & Research for innovation and leadership in integrating real-world business and engineering issues into undergraduate curricula internationally.

[sankar@business.auburn.edu](mailto:sankar@business.auburn.edu)  
<http://www.auburn.edu/~sankacs/>



**The Art & Craft of Case Writing, 2<sup>nd</sup> edition**  
by William & Margaret Naumes

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why this book is a must-buy for those who are planning to write new case studies and for those who are researching education research practices.

## Summary of the Book

The first chapter defines a case study and explores why an author may want to write one. Naumes and Naumes conclude the chapter by stating that the purpose of developing a teaching case is to enhance the pedagogical experience for the students. In Chapter 2, they differentiate between the various types of cases, namely descriptive, evaluative, decision-focus, and research-focus cases. They also discuss their opinions concerning the value of a case study from the points of view of Bloom's taxonomy and Fink's taxonomy of learning. They conclude this chapter by emphasizing that the choice of educational objective has a strong influence on the characteristics of the case study.

In Chapter 3, Naumes and Naumes discuss the steps an author can take to obtain the materials necessary for writing a teaching case study. An important step is to obtain agreement from a company to write a case study about an issue they have dealt with in the past. Even though many academicians might be tempted to develop library-based case studies, the authors provide compelling reasons as to why a field-based case study is more attractive to students. They also provide tips on how to obtain an authorization for release from the companies. They then take a detour, and in Chapter 4 discuss cases that are written primarily for research, their style and format, and the types of information they require. They provide a good description of the process to be used by an author, such as contacting the Institutional Review Board, developing a hypothesis, and preparing the case study. This information would be particularly useful for graduate students just starting to do this kind of research. They conclude the chapter by noting that a research case can subsequently be extended and developed as a teaching case.

The remainder of the book focuses on cases that are designed for teaching. Chapter 5 discusses the elements of an instructor's manual. The authors provide an outline of an instructor's manual and discuss these components thoroughly. This chapter focuses on "student take-aways," which are the ideas that students internalize by analyzing the case study. The chapter concludes by emphasizing the importance of developing an effective instructor's manual. Chapter 6 provides the guidelines for developing a case study. The authors discuss the importance of the "hook," the statement at the beginning of the case that is intended to get the reader interested in the case. The chapter concludes by stating that an effective case study is one that is both interesting and leads to a discussion that meets the objectives of the case.

Chapter 7 provides detailed instructions on how to test the case study in a class room, present it at a conference to obtain feedback, and how to make use of this feedback in the subsequent revision of the case. They conclude the chapter by stating that a case is an effective teaching tool, not only for the author, but also for other instructors. Chapter 8 details how to take the feedback from the testing in class and incorporate it in a revision to the instructor's manual. They conclude the chapter by stating that the purpose of this manual is to help other teachers use the case effectively.

Chapter 9 covers notes, case series, and other supplemental materials that can create a more in-depth learning environment. Chapter 10 discusses the video and multimedia case studies that are beginning to be available. They note at the end of this chapter that the demand for these case studies will increase in the future given the ubiquity of worldwide communications.

The authors provide a complete example of a case study in the Appendices. Appendixes I and II give two early drafts of the case study, and many of the chapters end with an analysis of these drafts. This allows readers to see

exactly how a case study develops and how incorporating changes suggested by the feedback from both colleagues and students improves the final product. The final published version of the case and its accompanying instructor's manual are included as Appendixes III and IV.

## Importance of this Book for Case Writers

Faculty members are not formally taught how to develop instructional materials and are at the mercy of textbook publishers when trying to bring innovative materials to their classrooms. With the consolidation of the publishing industry, the available material is limited in most fields. Published case studies provide a wealth of material that can help a faculty member bring real-world problems into the classroom. Many faculty members in disciplines such as strategic management develop and publish case studies regularly. However, there is a paucity of materials in many other business fields such as operations management, MIS, logistics, supply chain management, and ERP. The shortage is even more acute in engineering. The National Academy of Engineering (2005) recommends that engineering educators explore the development of case studies that examine engineering successes and failures and the appropriate use of the case-study approach in both undergraduate and graduate curricula. I have the privilege of working with a colleague who is a member of the engineering faculty at Auburn, Dr. P.K. Raju, and together we have developed eleven multimedia case studies funded by nine National Science Foundation grants during the past decade that are available from the Laboratory for Innovative Technology and Engineering Education (LITEE; [litee.auburn.edu](http://litee.auburn.edu)). When we run workshops on how to use the case studies, a common question from the audience is: "I have a great idea for a case study. How do I develop one?" This book by Naumes and Naumes will be an excellent resource for these faculty members.

New case writers will benefit tremendously by reading this book and following the steps provided in the chapters.

## Importance of this Book for Education Researchers

Even though case studies have been used in Colleges of Business for a long time, developing these materials is not considered to be of equal value to publishing a research article in many institutions. To counter this, professional societies such as the Decision Sciences Institute are now publishing journals that promote educational research. This is a very important and necessary step in legitimizing educational research as a scholarly pursuit.

The book by Naumes and Naumes offers many hypotheses that are worth investigating further for researchers wanting to develop research articles for possible publication in this journal and others. Some of the hypotheses proposed by the authors that have not yet been proven (or disproven!) with supporting literature or empirical research are:

- (a) The case method of teaching assumes that students are competent in knowledge and comprehension. This method is particularly well suited for analysis, synthesis, and evaluation (p. 21).
- (b) Cases present the opportunity to discuss not only specific situations but also the attitudes and reasoning, as well as the values, of the individuals involved (p. 22).
- (c) Cases are particularly well suited for the "application" and "integration" types of learning in Fink's taxonomy (p. 23).
- (d) Cases help students develop critical thinking and practical thinking and could provide opportunities for creative thinking (p. 23).
- (e) Multimedia case studies can offer an exciting opportunity for exposure to a wider range of the factors that affect the people directly impacted by the situation (p. 197).
- (f) The traditional, written case usually assumes a relatively linear learning style. The true multimedia case allows

students to follow nonlinear lines of thinking (p. 203).

- (g) Multimedia and web-linked cases may be a logical step towards making the classroom environment even more similar to their future experiences in the "real-world." (p. 211).

The authors have made the above assertions based on their extensive experience. If these statements can be empirically tested, this research will create a firm foundation for the science of case writing and teaching. It may then be possible to convert "the art and craft" of case writing to the "scientific method" of case writing and its subsequent use in the classroom.

## Conclusions

I am truly delighted that Naumes and Naumes have made the effort to capture their years of experience in a book. I expect it to be particularly useful for both new case writers and those engaged in education research. By writing this book, these authors have established a new tradition of "old bears" documenting their teaching experiences so that the "new bears" may benefit from that experience. I hope that this book will motivate other seasoned "old bears" in our disciplines to write similar books that document their experiences in teaching and pedagogy.

## Reference

National Academy of Engineering (2005). *The Engineer of 2020: Visions of Engineering in the New Century*, <http://books.nap.edu/catalog/10999.html>, accessed Jan. 5, 2006. ■

Members of DSI are invited to suggest books that should be reviewed in this column and reviewers to review them. Send suggestions to the Feature Editor.

*Peter T. Ittig, Feature Editor*  
College of Management  
University of Massachusetts  
Boston, MA 02125-3393  
[http://www.faculty.umb.edu/peter\\_ittig/](http://www.faculty.umb.edu/peter_ittig/)

## Make Plans to Attend the Deans' Forums at the DSI Annual Meeting

The 2006 DSI Deans Forum will comprise deans from business schools who will discuss topics of interest to conference attendees from multiple disciplines. The proposed topics include promotion and tenure, the future of tenure, the accreditation process and its impact on colleges of business, where do the disciplines listed under the DSI conference fit into their universities' future plans, multilingualism and its impact on teaching, and multiculturalism and the role of the college of business.

### DF-1 Deans' Forum I

*Sunday, Nov. 19th, 10:00 AM - 11:30 AM*

*Facilitators:*

Steve Clarke (University of Hull, UK)  
Jimmie L Joseph (University of Texas at El Paso)  
Jack A Vaughn (University of Texas El Paso)

*Panelists:*

David Christy (California Polytechnic State University)  
Charles T Crespy (University of New Mexico)  
Maling Ebrahimpour (Roger Williams University)  
Robert Nachtmann (University of Texas at El Paso)  
Susan E. Pariseau (Merrimack College)  
Brian Reithel (University of Mississippi)

### DF-2 Deans' Forum II

*Monday, Nov. 20th, 1:00 PM - 2:30 PM*

*Panelists:*

Linda de LA Vina (University of Texas at San Antonio)  
Krishna S. Dhir (Berry College)  
Robert E Markland (Univ. of South Carolina)