

Case Writing Workshop: Creating Customized Learning Tools

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Participants will complete a first draft of a teaching case/exercise in 90 minutes. The workshop will cover (1) using learning objectives; (2) scripting the learning process; (3) developing the “story;” (4) characters and character development; and (5) completing the narrative. We will also discuss the development of supplementary materials, copyright, distribution options, and marketing.

Keywords: case writing, exercise development, customized learning

The ubiquitous availability of information on the internet has greatly impacted case teaching in business programs. Model write-ups for textbook cases and cases from widely used catalogs like the Harvard Business School cases are readily available, and students use these write-ups to meet the time demands of preparing cases and also to shirk on the engagement necessary to understand the case. Students have shared that they actually do not bother reading the cases for their “textbook classes” because the instruction is focused on the write-up information rather than the actual case. I was shocked to hear students talk openly about this (and, yes, this suggests other issues of concern for our programs).

In addition to the engagement issue, in many instances available cases are “almost right” rather than aligning with the session and course learning objectives. The reality in most instances is cases are authored by someone else reflecting a particular approach to the material that is not a complete match for the emphasis and learning script a professor has in mind. A well-structured case course follows a learning path, and “almost right” cases can complicate the students’ comprehension of learning objectives and also enervate students who are confused by the “almost.”

A solution that addresses both of these problems is to write cases and exercises customized to the specific course you are teaching. Most individual’s initial reaction is “I do not have the time.” As this workshop will demonstrate, time is not a problem if the case objectives are clearly articulated. Most cases are not much longer than a paper review for a journal, and most individuals can knock out a review in a day. The challenge is having a clear set of writing goals and clarity about what the case

will contain. This clarity about objectives is the solution that makes writing customized materials a realistic and time-effective option.

The session proposed is 90 minutes with the goal of having every participant complete a rough draft of a case or case exercise (similar to Carter Racing). These will not be finished products, but participants will have a skeleton they can build on, including a fair amount of the details that bring a case to life. The case draft will be specific to each participant’s learning objectives for a class session. We will also discuss distribution of the case once it is completed.

Session Proposal (90 minutes)

10 minutes	Discussion of the role of cases and exercises (participants experience) and what they would like to achieve with customized materials.
10 minutes	Picking a class and recording the session learning objectives for the case each participant will write. Facilitator will use examples from published cases and the participants will identify an example they use in class with the potential to become a case.
20 minutes	Scripting the learning process. This very important step defines the “holes” students need to fill in the case – what should their analysis tell them and how will they figure out what goes in these “holes.” This also requires developing a timeline describing what students will need to discover and in what order.
15 minutes	What is the story? What is the background that makes the story realistic, including product/service, company history, and organizational features? What is the detail that makes the story “real,” while at the same time keeps the story simple?
10 minutes	Putting flesh on the characters, making them real to you in order to make them real to the students. The participating case writers will “name” the characters and give them personalities, and we will also discuss resources for establishing gender neutrality in the case, which allows all students to “occupy” case characters.
10 minutes	Completing the narrative, which involves taking the skeleton and adding story and characters to complete the rough draft of the case.
15 minutes	Discussion, including supplementary materials and distribution, and review commitments from the participants. All participants will be asked to act as reviewers for the cases developed during the workshop.

Customized Course Materials and the Changing Currents of OB

There is no better way to keep course materials relevant than generating cases, case exercises, and relevant class examples real time. My teaching is 50% lecture and 50% cases and exercises, and I have increasingly generated my own materials over the past few years. In the current year, as the Wells Fargo fraud case became a major news story, I was able to complete a case that explores pay-for-performance incentives, their implications and unintended consequences, and make a golden oldie, Kerr's (1995) *On the Folly of Rewarding A while Hoping for B* come alive for my students. The case, RealGood Insurance, has been published by Delta Leadership (Brittain and Sims, 2016: available February 2017) and several colleagues are using it for OB and Human Relations courses.

The industrial case factories will certainly have a Wells Fargo case on the market in a year or two, but the story will be stale and the learning urgency lost. RealGood is not only timely while Wells Fargo is in the news, it also has issues of culture building, employee empowerment, and management decision making that are timeless and remain important lessons for my course long after the Wells Fargo scandal is forgotten. Because cases that are written to match learning objectives can always use the scandal as a touch point, but they are not dependent on the scandal for relevance.

I first became involved in the learning enterprise as a TA in 1977, taught my first course as an instructor in charge in 1980, and wrote my first case exercise, *Carter Racing*, in 1986. *Carter Racing*, which now has a version called *Speed Ventures* because of the large number of case papers for sale using the *Carter Racing* title, has been licensed over 500,000 times, has versions in 8 languages, and is licensed between 24,000 and 28,000 times a year (it is distributed by the Delta Leadership in North Carolina and the Dispute Resolution Research Center at the Kellogg School at Northwestern University). There is certainly significant unlicensed use as well.

In the midst of a career in teaching that is now 40 years long, I took a sixteen year hiatus to serve as a university administrator. In my time outside the classroom from 1998 to 2014, the internet changed everything. In 1998, we still made Xerox copies of packets and students studied with friends to better understand the material. When I returned to teaching, I found internet research was research for the current generation of students, and when getting an assignment the first thing they did was look on the internet. I also found the nature of engagement had changed fundamentally and I was dealing with a TED

generation that believed everything relevant to their management careers could be encapsulated in a ten-minute TED talk.

The adjustment that has been by far the most successful for me is writing my own customized case materials. The students are highly engaged because the characters are these same students in two years, individuals who are relatively new managers and are trying to cope with the leadership challenges that come up in the smaller entrepreneurial companies where they are increasingly likely to take jobs. They are engaged because the cases are absolutely aligned with the lecture and reading material and aligned with the course learning objectives. And they are engaged because the cases and case exercises are fresh and they cannot find the answers on the internet.

I do not want to trivialize the work involved in putting together a case, although the most laborious part is putting together the teaching note and support materials. I wrote 4 new cases this academic year, two on one weekend. As I prepared for a new semester, I decided I was tired of the group decision making case, which “almost fit,” and I had added a new module to the course and needed an accompanying case. After writing the two cases, and then spending the following week reviewing and updating them a couple of times, I was able to deploy the cases and use them in a class to test the material. There were some tweaks that I needed to make, but they worked extraordinarily well because they were written to match my learning objectives and were aligned with my other course materials.

Finally, writing course materials is creatively challenging and intellectually rewarding. Not only does this effort align course materials with the changing currents of OB, it is also a way to keep my courses fresh with core material that I have been teaching for thirty-six years. Some material, like the history of Scientific Management has not changed much, but *RealGood Insurance* is timely and fun to discuss because it is very much of the moment.

My goal for the proposed session is to help my colleagues see the potential for customized materials, to understand how to put together a relevant case, and to also understand the time demands are minimal if the case is focused on student learning and the learning objectives for a module or session.

Contribution to the Organizational Behavior Teaching Conference

I have never done the workshop proposed here, so it is an activity that will be unique to the OBTC. I hope it is an activity that others will steal and share with their colleagues, and maybe even an activity that the OBTC uses in the future. I am nearing retirement, and I hope this is a contribution I can make to the profession that is, perhaps, enduring.

The first public presentation of *Carter Racing* was at the Organization Behavior Teaching Conference in Boston in 1987, thirty years ago. Sim Sitkin and I had no intention of making Carter Racing one of the signature accomplishments of our careers, and yet it has succeed beyond anything we could ever imagine. We have learned a great deal from it, and I have learned a great deal about writing and deploying effective case exercises – it will always be a classroom exercise to me – in the intervening 30 years. I think I have some accumulated experience that will be valuable to my colleagues, and I think the communal writing exercise will be fun and build a community for those who participate.

One feature of the design that I think is important and matters: I am asking every participant to serve as a reviewer for their colleagues as they work to finalize the cases they develop. I believe the dialog that emerges can enrich the Conference. I also think it will be fun.

References

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