

TOTAL CASE: Suggestions for Improving Case Writing

Craig Davis, Ohio University
Cara Peters, Winthrop University
Leigh Cellucci, East Carolina University

Introduction

The Society for Case Research held a preconference workshop to help authors improve their case research skills. It was held the day prior to the 2013 summer workshop and was informally called "the Case Writer's Boot Camp" as it focused on the basics of case writing. The speakers for the workshop, Karen Berger, Craig Davis, and Cara Peters, addressed topics that ranged from what is in a case and teaching note to tips for writing and publishing cases. Evaluation by the twenty attendees was positive, and the editors thought this was another way to share at least part of the workshop with the *JCS* readers.

One component of the workshop, presented by Craig Davis, focused on how to write stronger and well written cases. He framed his tips for case writing around the mnemonic: TOTAL CASE. This acronym and mnemonic was developed to make it easy for authors to remember the important criteria needed to publish a case.

TOTAL CASE stands for:

T = Tense
O = Objectivity
T = Tone
A = Authenticity
L = Length

C = Characters
A = All-in-order
S = Suspense
E = Ending

Thus, the focus of this article is to enhance and improve case writing prose by applying the TOTAL CASE criteria to help authors produce more interesting, accurate and publishable cases.

TOTAL CASE

T = Tense

The letter T represents *tense*. Cases have already happened. Cases are in the past, so they should be written in past tense. It may be helpful for authors might think of case narratives like the genre of historical non-fiction.

Consider the example sentence below.

Counter framing theory provides an opposing argument to neutralize or override the original framed message.

Because the counter framing theory exists today, it is easy for authors to write in the present tense. However, case writing requires past tense. Thus, the sentence should be rewritten as follows.

Counter framing theory provided an opposing argument to neutralize or override the original framed message.

But, ensuring that a case is in the past tense can be tricky. One suggestion is for authors to find the main verb of each sentence and ask: “Is the main verb in each sentence in past tense?”

When rewriting a sentence to ensure that it remains in the past tense, authors should also be cognizant of the active versus passive nature of the writing. Writing in the past tense and writing in an active voice are required.

See the two sentences below and compare the differences.

Nancy Upton, a college student from Texas, read the article and decided to create a satirical entry to the contest.

Nancy Upton, a college student from Texas, read the article and created a satirical entry to the contest.

While the first sentence is in past tense, it is written in a passive form. The second sentence is better because it is written in past tense, but it also uses the active voice. In general, to create a publishable case, authors should write in the past tense using the active voice.

O = Objective

The second letter O indicates *objectivity*. The writing of a case should be as factual and objective as possible. While some believe stories can never be unbiased, authors should strive for objectivity. Authors should comb through their cases and eliminate biased writing. As authors proof and edit their drafts, they should look for opinionated-sounding clauses in the writing. If opinionated, biased language appears then the author should re-write these phrases or eliminate them altogether.

An example of an opinionated-sounding clause is:

As any good marketing person would do, Gerry re-examined the sales data from 2012 year.

The phrase, “as any good marketing person would do,” presents a biased opinion about Gerry’s actions. Thus, it would be best to remove the biased language from that sentence and simply write:

Gerry re-examined the sales data.

Or by adding more information the author might write:

To develop a benchmark for revenue, Gerry re-examined the sales data from last year.

The case “When ‘You’re Fired is not an Option: A CEO’s Dilemma” illustrates the O = Objective. The authors Joyner, Frantz, and Smolnikar present the human resource decision options directly. What does a CEO do when she cannot fire an employee, but she reasonably suspects said employee has violated confidentiality? The options are presented without bias; the decision is for the students to make.

T = Tone

The second T in TOTAL CASE prompts the word *tone*. The academic training in doctoral programs requires students to write in a scholarly tone. However, case writing is different from scholarly writing. Case writing requires a more conversational tone. As explained by Gina Vega in her book titled, *The Case Writing Workbook: A Self-Guided Workshop*, she said, “Case writing requires a lighter hand, a more relaxed presentation, and the deft use of descriptive and evocative writing to stimulate the reader’s imagination” (Vega, 2013). With case writing, authors should be more concerned with making their cases read like a news story or a magazine feature article. If a particular case does not read like this, then the author should rewrite the case with a more conversational tone.

The case “Flash Mob ‘Invades’ Sleepy Rural Town” exemplifies the T=Tone recommendation. Authors Tuma, Cook, and Waldecker describe how university students participated in a project of urban renewal that combined philanthropy with an attempt to affect tourism-based economic development. The tone of the case reflects the upbeat, student project and provides the reader a clear picture of the flash mob performance and citizen positive response.

While tone is similar to the voice of the author, tone is not style. Style refers to the stylistic guidelines required for publication. The Society for Case Research organization requires authors to use the most recent version of the APA Style Guide. The Society for

Case Research website provides guidelines related to the style of all aspects of an author's case such as figures, tables, formatting, headers, typeface, font size, file size, abstracts and more.

With respect to style, the following are helpful:

1. *Society for Case Research Manuscript Guidelines for Authors* found at www.sfcr.org
2. *Publication Manual of the American Psychological Association*, latest version.

Have these documents in an easy to access location while writing the case. Or, visit the Society for Case Research website to obtain the guidelines for publication, purchase a new APA style manual or find an up-to-date website that contains the correct APA style information.

There are many experienced case writers in our organization that would be happy to share examples of cases that they recently published. Alternatively, examine recently published cases for each of the journals published by the organization: *Business Case Journal*; *Journal of Case Studies*; *Journal of Critical Incidents*.

The *Journal of Case Studies* is published online. Aspiring authors can easily find current and past issues on the journal websites at www.sfcr.org, and www.sfcrcjcs.org.

A = Authenticity

The letter A stands for *authenticity*. Simply put, all cases and critical incidents published by the Society for Case Research must be real. In the words of Craig Davis, during the preconference workshop, “You can’t make this stuff up. No way. No how.” An author cannot invent companies, locations, actions, conversations, people, scenarios, or situations.

With authenticity being so important, an author might wonder, *How do I write a case if I was not there? How can I write from the perspective of one individual if I do not know them? How can I remember every word from a meeting?*

This leads to an important dilemma for case writers — how to represent a case as factual history. When does setting a scene or describing characters cross into fiction and imagination? What is the line between historical inference and invention?

Clearly, these are gray areas that require authors to use their best judgment. The question that all case writers should ask and answer to the best of their ability is: “Am I honoring the mission of the Society for Case Research?”

The Society for Case Research views cases as real life, true stories. “The story is told about a real event in a real organization in a real industry,” said William Stratton, Past

President of Society for Case Research. He defined a case as “an authentic description of a real situation . . .” (as cited in Berger, Stratton, Thomas, and Cook, 2011). Silverman and Welty (1994) define a case as “a real-life problem or dilemma, which has no immediate, obvious, single or correct solution” (as cited in Millis and Cottell, 1998.). The key points about cases are that they are true; the event(s) really happened; and there has been research conducted that provides an organizational scenario.

When submitting to one of the Society for Case Research workshops, conferences, or journals, the author has entered into an implicit agreement with the organization and they are creating real experiences, not in-class exercises.

Another suggestion for the authors who find themselves in this gray area is to think about the content. ‘Are we inventing or re-creating a situation?’ The Society for Case Research allows for a “reasonable” re-creation of events, situations, discussions, or meetings that mirror the facts of the case. However, the Society for Case Research does not allow for the invention of events, situations, discussions or meetings.

The best way to make sure that content is not invented is to ask the person(s) giving consent to publish to read the case and help verify the accuracy of the writing.

L = Length

The letter L in TOTAL CASE implies *length*. Cases are typically 7 to 15 pages in length. When they get longer than 15 pages, the author is asking a lot of the reviewer and student reader. Reviewers and students seem to tire of a case after 15 pages of reading. There are exceptions, however, and SCR has published cases that were 30-40 pages long.

The case “Succession Planning and Leadership at DRYCO, Inc.” is an example of a complex case that addresses the L = Length recommendation. As the case focused on succession planning of an organization, readers should be made aware of the organization’s timeline, family involvement in the organization, and stakeholder opinions. The authors Whaley and Walker supplied this additional information in appendices. Thus, the case story follows the recommended length guidelines (11 pages) with the additional information provided in four appendices.

Sometimes authors do reject the premise that their case is too long. Because authors conduct many interviews and extensive research on the company and related problems, they become immersed in details, and granted, some topics are more complex. However, we encourage the author to listen to the feedback provided by the workshop or conference attendees. Moreover, if reviewers or journal editors state it is too long, then the author must meet the reviewers and editors request.

Also at times authors are so immersed in their work that they have a hard time seeing the case from the perspective of an unknown faculty member who might adopt the case, or from the perspective of the student who will be assigned the case in the classroom. It may help to get an initial “friendly” read by someone in the Society for Case Research

organization who can suggest ways to reduce the length. It also may even be worth an author's time to include this person as a co-author and let them revise the case to be shorter.

C = Character(s)

The letter C recalls the word for *character*. The best cases have characters. An author can certainly write a case without characters, but the narrative and storytelling aspects of the case tends to be weak. Characters provide depth, detail, and interest. Do not be afraid to build in information about the character's personality, leadership style, or any other interesting details if they emerged during the data collection.

Our suggestion is to include a character, also known as the protagonist, when writing a case, even in disguised cases and descriptive cases. When a case is descriptive or written from secondary sources, character details can usually be obtained from reading public documents, such as popular press articles, financial reports, or websites that may contain information or quotes from people within a company. An author can creatively describe a person's personality and leadership style without revealing the character's name and identity.

Furthermore, we suggest that authors introduce the character in the introductory hook and reveal information about them with action and dialogue throughout the rest of the case. Once the character is introduced, the author can return to them when telling the story. This provides a consistent thread throughout the case and improves flow and student comprehension.

In the case "Theo Chocolate: Doing Well by Doing Good," authors Butcher and Wilson develop the character of Joe Whinney, the founder of Theo Chocolate. Throughout the case, the reader learns more about Joe, a man who cared about people, the environment, and chocolate.

A = All-in-order

The second A hints at the hyphenated word *all-in-order*. *All-in-order* means that cases are historical in nature and require a beginning, middle, and end. A case is really a chronological story from beginning to end. Authors should convey a sense of time throughout the case. It should read chronologically from beginning to end or end to beginning, depending on how the narrative is structured.

In order to check the chronological nature of a case, authors should ask themselves, "Have I committed a time-stamp error?" Below is a fictional example to illustrate this kind of error.

On Wednesday, August 8 at 11:49 p.m., Jane Doe, account manager from ACE Public Relations, gathered her team in the conference room of the New York

office. It had been a long day. Now they were going to hold a conference call with Dick Smith, Marketing Manager for the Delicious Hotdog brand, to review what had happened that day and to discuss next steps and agency recommendations.

The day before, Village News writer had picked up ACE's press release and had written a story in the advertising and media section titled, "A Weener Surprise." The word was out. Delicious Hotdogs would be distributing 10,000 free hotdogs in New York City and ACE's guerilla plan to give away hotdogs was off to a great start.

The activation program began the next day, August 8 at 9 a.m., with Delicious Hotdog Carts, similar to carts used by hotdog and food vendors in the city, making their official debut at Times Square outside of Harold Stein's studio. During Mr. Stein's morning radio show, he encouraged fans to check out the carts around the city. By 11a.m., over 1000 hotdogs were distributed.

The time-stamp error in this example makes it difficult to follow what is happening. The case begins with a meeting late on a Wednesday night. It then jumps to sometime the day before and then jumps back to Wednesday morning. The jumps in time create confusion for the reader. Authors can use a timeline to help maintain a chronological thread throughout the story to keep important events *all-in-order*.

Case authors Gavino, Portugal, and Briones demonstrate mindfulness of A = All-in-order in "Change Management at Mars Publishing House." In this descriptive case, the IT manager was charged with successfully implementing the new Enterprise Resource Planning (ERP) system within a ten-month timeframe. Their careful attention to maintaining the chronological thread throughout the case allows readers to understand how the IT manager proceeded with the project and was, indeed, successful.

S = Suspense

The S means *suspense*. All cases should have a built-in sense of *suspense* and *tensiveness*. The writing of a case should create the kind of suspense that makes the reader want to read on to find out what is going to happen in the end, or what action will the protagonist take.

When writing a case, authors should ask themselves two questions:

1. Does the case build suspense for the decision point?
2. Does the case have "tensive pull?"

Professor Hannah Harvey, in *The Art of Storytelling: From Parents to Professionals*, discusses the importance of *tensiveness* in storytelling. With stories and with cases, the places, times and characters should work together toward an outcome or decision. The dynamic quality within cases making them interesting is called *suspense*, or more

accurately *tensiveness*. Another way to think of tension is the think of it as a “stretching or straining among opposing forces” (Harvey, 2012).

An example of *tensiveness* can be seen in the following statement below. It shows the conflict or tensiveness of hand labor vs intellectual labor.

We work with our hands so other people can work with their heads (Bill, Coal Miner).

Suspense should keep the reader interested in the ongoing story line and draw the reader toward the decision point that appears later in the ending hook of case. *Tensiveness* in the body of the case connects the elements of the story.

The case, “You’re Not Good Enough,” illustrates the S = Suspense recommendation as the protagonist Clint learns about the importance of mentoring, leadership, and motivation. Authors Carpenter and Hodge provide a poignant account of early work experience when Clint learns that company leaders thought he was not “good enough.”

E = Ending

The letter E implies *ending*. Every case requires a conclusion that is congruent with, and ties back to the opening hook. We suggest thinking of the ending as a “closing hook.” Like the hook, the ending should be interesting, provocative, and draw the reader into analysis or discussion. In other words, a good ending should summarize the issue at hand while presenting the reader with the issue to be analyzed or the decision point.

Moreover, the ending should present a wide range of possible perspectives and alternatives. It may also require the readers to test their assumptions and knowledge. Finally, the ending should lead into what is to come in the teaching note. An example of a closing hook that provides a summary along with a wide range of possible perspectives for the reader to consider is presented below.

Looking at her 2008 sales figures, Lynne was quite distraught. She had invested years of her life and savings in developing her fledgling business resulting in respectable sales with a diverse product line, reliable supply sources, and popular products. “The NYC Subway Line brand has become part of popular cultures of New York, and that’s an accomplishment,” she noted. However, with a license that was subject to annual review, she was reliant on the licensing vagaries of the MTA and, at the same time, had to remain vigilant against unlicensed competitors. The marginal profitability of her business barely afforded her a salary, and she wondered if she could grow without national expansion as a lifestyle brand. Was it still possible for her to achieve her life’s dream?

Case authors Brooks, Cox, Dunn, and Kobre conclude their case, “Superman: Man of Steel! . . .Or . . .Man of Boycott?” by summarizing the main issues in the case and

referring back to the hook regarding the controversy for the Superman's comic publication. Let us consider the closing paragraph as follows (Brooks et al, 2014, 45):

Such an evenly split difference of opinions on this issue didn't make DC's decision any easier. Should DC fire a man over his political and social opinions? Should the company retain Card's services despite the risk of lost comic sales and the potential risk of lost movie revenues? Should Card's highly successful career as a science-fiction author affect the company's decision? With so much at stake and a divided American public, DC had little time remaining to decide how to address this controversy.

The students are informed clearly and concisely what they should consider as they proceed with their cases analyses.

Case authors Lu and Davis also conclude their case, "Absolut Vodka's First Limited Edition for Chinese Consumers" by illustrating a main point about the success of the marketing campaign-- the importance of marketers' understanding the unique characteristics of consumers from different cultures. The readers are made aware of this underlying critical success factor as they consider campaign specifics.

Conclusion

The purpose of this article is to share the TOTAL CASE mnemonic with the readers of JCS so that we all become better case writers. Clearly, new case writers need to learn about the conventions of case writing and the TOTAL CASE mnemonic gives them an easy-to-remember frame of reference to help them on their way. However, more experienced case writers, who have learned the art of case writing along the way, may also appreciate the reminder or may even see their writing in a different way under the lens of the TOTAL CASE mnemonic.

References

- Vega, G. (2013). *The Case Writing Workbook: A Self-Guided Workshop*. M. Sharpe: Amonk, NY pg 61
- Harvey, H. (2012) *The Art of Storytelling From Parents to Professionals*. Transcript Book, pg 158

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