



Erasmus+



Case Writing Curriculum

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1 Target Audience and Learning Objectives

Case studies are a unique learning tool through which students vicariously experience stressful management situations or dilemmas that they must then analyze and solve. A well-written case is art as well as science. It grabs the reader and compels him or her to keep reading, and to dig into a situation to discover what is really happening. It is also logically and systematically structured, and serves a defined pedagogical purpose.

This case writing curriculum is mainly prepared for **case tutors** in Turkey looking to write their own teaching cases. Although case tutors can teach existing cases developed by others, this would not give them as much control over their teaching as using their own cases. Only with their own case can they reach all of the teaching objectives that they have in mind. Because they are familiar with the case material, they can play with it to enhance discussion quality and class dynamics.

Researchers – especially those who do qualitative research – can also use this curriculum to learn to turn their data into nice case studies, therefore maximize the use of their research.

This curriculum can be used for **business professionals** as well who wish to reflect on their experiences and share best practices or lessons learned through developing case studies of their own practices.

Finally, this curriculum may also be of use to those **'train-the-trainers'** looking to promote future case writing programmes in universities and businesses in Turkey.

2 Format for Delivery

These materials can be used as part of a 1-2 day training programme for new case writers, or as a self-training programme on 'developing your own cases.' The accompanying slides explain the art and science of crafting a case. Examples – in the slides or as handouts – are provided to illustrate the learning points. For each building block of the curriculum, there are exercises for participants to practice the skills they would need for writing a case.

Although the recommended format is a 1-2 day workshop (**appendix 1**), this curriculum can be used as a university course module in which the tutor gives participants plenty time to fully write up their cases.

Because of the nature of the workshop, we recommend that the size of the class is no larger than 20 people to guarantee that all participants have equal chances to practice on their writing and get feedback from the tutor.

3 Materials for Curriculum Training

This brief document is there to provide an explanation for a set of accompanying curriculum training slides, which are segmented into four sections as follows:

A – Introduction to cases and case writing

B – Building block 1: Concept

C - Building block 2: Content

D - Building block 3: Communication

“Concept” pertains to the purpose of a case study; “Content” describes where to find information for building the case and how to structure the information; “Communication” explains how to write the case so that it engages students. The three C’s are the pillars of case writing; if one is missing, the case will collapse.

Section A – Introduction to cases and case writing – see slides 3-20

There are many different definitions of what makes a case study, so this section unpacks what is meant by a management case study that can be used with a group of learners for in-class or remote learning purposes. The following slides can be used to provoke a conversation about ‘what is a case’ and ‘how does the case method promote learning.’

Section B – Building block 1: Concept – see slides 21-33

Now that the participants have considered the case method and how it contributes to learning, it is worth considering whether there are some common principles of the case method that contribute to a good learning experience. This section contains some suggestions, which include ideas generated by some well-established case users.

Section C - Building block 2: Content – see slides 34-55

There are different types of case study that can be used in different contexts to test different skills and evoke different contributions from the learners. The slides in this section examine three different ways of classifying these.

Section D - Building block 3: Communication – see slides 56-67

Now that the participants have looked at the different types and uses of the case method, it is important to consider what different roles the case tutor should and should not employ in the classroom. Remember, a case tutor is there to ‘facilitate learning,’ not to teach or

control classroom delivery. The slides in this section examine different functions of the case tutor.

4 Exercises to accompany the Case Curriculum

Throughout the programme participants are invited to deepen their understanding of case writing and practice case writing skills from the exercises provided in the slides as well as in **appendix 2** and **appendix 3** of this document.

5 Adapting to The Turkish Context

The case method, invented by the Harvard Business School a century ago, has since been adopted by the rest of North America and Europe, and is currently spreading to many non-Western countries. For any case writer who develops cases with students from non-Western countries as the target audience, it is important to remember that a good case is locally embedded. The business environment and management practices in emerging economies, for example in Turkey, can be very different from that of a developed Western country. There is a great need to learn about business in emerging economies, but the good quality cases currently available are not enough to satisfy this need. This gives case writers in these countries an opportunity to fill the gap.

6 Further Materials

The CAT Case Project has produced a range of different supportive outputs to accompany this curriculum guide. In particular there are the following two documents:

Access to these free documents can be found at:

<https://ginova.itu.edu.tr/cat>

www.cat.ba.metu.edu.tr

Appendix 1 – Example of a Workshop Programme

Day 1

| | |
|--------------------|---|
| 09:00-10:30 | <p>Welcome and Introduction</p> <p>Overview of the teaching case “market”</p> <p>What makes a good teaching case?</p> <p>The differences between a teaching and research case</p> |
| 10:30-10:45 | <p>Coffee break </p> |
| 10:45-12:00 | <p>The essence of a teaching case: the decision focus</p> <p>Exercise: Choosing the right decision focus</p> |
| 12:00-13:00 | <p>Lunch </p> |
| 13:00-14:30 | <p>Teaching objectives and plan</p> <p>Exercise: Mapping the teaching note</p> |
| 14:30-14:45 | <p>Coffee break </p> |
| 14:45-16:30 | <p>Standard case components</p> <p>Case structure</p> <p>Exercise: Outlining the case structure</p> |

Workshop Programme

Day 2

| | |
|--------------------|---|
| 09:00-10:15 | The importance of case opening Case writing style |
| 10:15-10:30 | Coffee break  |
| 10:30-12:00 | Exercise: Writing and presenting the case opening |
| 12:00-13:00 | Lunch  |
| 13:00-14:30 | Case plan Exercise: Making the case plan |
| 14:30-14:45 | Coffee break  |
| 14:45-16:30 | Data collection and interviews Exercise: Expanding the teaching note Edit the case and case release Closing |

Appendix 2 – Whodunnit? Write a Short Detective Story

Decision focus: Find out who did it.

Protagonist: a private detective named Altan

Time point: 01-01-2018

Action trigger: The murderer is at large and may kill again.

Opening:

When the phone rings at six in the morning it's never good news – and worse when it's New Year's Day. Private detective Altan picks up reluctantly. "Go to Atatürk Airport terminal one," a voice he doesn't recognize says. "Who is it?" he asks, but the person clicks off. Altan rolls over and goes back to sleep. In his 30-year career he's had enough prank calls like this. Two hours later Zane – Altan's colleague – calls and tells him to go to the airport at once: a lady was murdered at terminal one two hours ago.

Instructions:

1. Know where you are going before you start.
2. A good plot is more important than good English.
3. Don't make the plot too complicated, but don't make the solution too obvious either.
4. You have 60 minutes to finish the story.
5. There is no word limit. Just make the story clear and coherent.
6. Give your story a title.
7. Don't write anything you yourself would not want to read.

Appendix 3 – Analyse Case Openings

Case Opening 1

On a Monday morning in September 2014, Michel Raymond Nassif (Michel Junior), 48-year-old grandson of Michel Elie Nassif (Michel Senior), the founder of Michel Nassif et Fils (MNF), was sitting in his office in Beirut, Lebanon when his assistant called him to transfer an urgent call. He asked her not to disturb him. He was deep in thought, trying to figure out what decisions should be taken to ensure the development of the company. His main concern was how the company should be structured to ensure its sustainability through future generations.

For the first time, Michel Junior had the feeling that the company, which had been driven so far by the personalities and aspirations of its successive owners across different generations and eras through challenging socio-economic situations in Lebanon, needed and deserved more. MNF's potential was great and the means were there, yet there was a need to ensure sustainability of operations.

The decision Michel Junior was about to take was strategic, as it would impact the company's direction for generations to come. He said, "In the context of developing the company, we have to understand both the past and the present." In the case of MNF, the past was dense with ups and downs as it was closely intertwined with its owners' personalities and the Nassif family history. What kind of company would his son be managing 30 years from now?

Case Opening 2

Kyai Ivuso Mullei, CEO of fundraising platform M-Changa, stepped out of a board meeting and checked his phone to find several e-mails from different organizations looking to partner with his company. He hesitated in replying.

Over the previous four years, Mullei and co-founder, David Mark, had built M-Changa into one of the fastest-growing fundraising platforms in Kenya. Mimicking the Kenyan tradition of *harambee*—the donation of funds by family or community members for critical life expenses such as weddings and funerals—M-Changa helped Kenyans host fundraisers for personal expenses. The service allowed them to use text messages on their mobile phones to send, receive, and track donated funds as well as solicit donations from family and friends. M-Changa had quickly caught on, and by April 2015 it had a team of five people serving 25,000 users.

The key to M-Changa's growth had been its partnerships with banks, mobile operators, crowdfunding platforms, NGOs, and other domestic and international organizations. During the board meeting, however, M-Changa's board members had expressed concern that its multitude of partnerships may have spread the company too thin. The board had urged Mullei and Mark to focus on the partnerships that would reap the most value for the company in the long run.

Mullei pondered the options: one set of M-Changa's partnerships comprised mobile money operators and banks that made it possible for users to transfer money conveniently and at a low cost. Another set of partners allowed M-Changa to test new customer segments and increase sales. To Mullei, it seemed that all of the partners and potential partners were valuable, whether they resulted in sales growth in the short or long run. Choosing which opportunities to forgo would be difficult.

Case Opening 3

Phone call, November 2010: 

To: Sankar Krishnan, Managing Director at the global professional services firm Alvarez & Marsal (A&M)

From: Steve Cohen, Managing Director of Alvarez & Marsal's North American Commercial Restructuring practice

Steve Cohen: *Sankar, I've just received some worrying news from Sapphire Capital (SC). You know the firm? It's one of our large US-based distress private equity fund clients. We have advised them on several engagements. One of their Indian portfolio companies has some serious issues. It seems the top management may have been involved in some irregular activities and the company is in a crisis. That's all the information I have at the moment, but they seem very nervous.*

Sankar Krishnan: *Yes, I know SC. This sounds serious. We need to organize a call with the fund and with Nikhil to discuss what steps we should take next. Nikhil is on vacation with his family, but from the sound of it we can't wait. Let's speak tomorrow at 8.30am. I'll call Nikhil if you can organize getting the SC people together?*

Case Opening 4

After three successful years in the Personal Care division of Unilever in Pakistan, Laercio Cardoso was contemplating an attractive leadership position in China when he received a

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phone call from the head of Unilever's Home Care division in Brazil, his native country. Robert Davidson was looking for someone to explore growth opportunities in the marketing of detergents to low-income consumers living in the Northeast of Brazil. An alumnus of INSEAD's Advanced Management Programme, Laercio had joined Unilever in 1986 after graduating in business administration from Fundação Getulio Vargas in São Paulo. He thus had the seniority and marketing skills that were necessary for the project. More importantly, he had never been involved in the traditional approach to marketing detergents and, having witnessed the success of Nirma in India, he was acutely aware of the threat posed by local brands targeted at low-income consumers.

For this project, named "Everyman", Laercio assembled an interdisciplinary team including Marcos Diniz from Sales, Antonio Conde from Finance, and Airtton Sinigaglia from Manufacturing. The first phase of the project involved extensive field studies to understand the lifestyle, aspirations, shopping and laundry habits of low-income consumers. It was during one of these trips that Laercio met Maria Conceição, pictured on the cover page in her home in Fortaleza, where she lived with her daughter, Elizangela, 19 (shown on the right with two of her four children). Like almost everyone in Brazil, Maria told Laercio that although she would love to buy Omo, Unilever's flagship brand, her tight budget meant that she could only afford cheaper local brands.

Back at Unilever's headquarters in São Paulo, Laercio prepared for an important meeting with Davidson to decide whether the company should change the way it marketed its detergent brands to low-income consumers in the Northeast. Increasing detergent usage by Maria and the other 48 million predominantly low-income consumers in Brazil's Northeast was crucial for Unilever, given that the company already had an 81% share of the detergent powder category. However, many in the company believed that a large multinational like Unilever should not fight in the lower-end of the market, where even small, local entrepreneurs with a lower cost structure struggled to break even. How could one justify diverting money from Omo to invest in a lower-margin segment?

Deciding to target low-income consumers in the Northeast would throw up some more difficult questions: Should Unilever change its current marketing and branding strategy? For example, could Unilever extend or reposition its existing cheaper brands, Minerva and Campeiro, or would a new brand be necessary? What would be the ideal positioning and marketing mix of a Unilever brand targeted at low-income consumers? Finding the answers would not be easy as few at Unilever (or other multinational firms) had any knowledge of low-income consumers or first-hand experience of the kind of marketing strategy that would work for this segment.

The 4 openings are from the following cases - in this order:

1. *Michel Nassif et Fils: Succeeding Generations*, by Randa Salamoun and Lina Tannir, Ivey Publishing
2. *M-Changa: ^{SEP}Leveraging Kenya's Mobile Money Market for Community Fundraising*, by Nilima Achwal and Sarit Markovich, Northwestern Kellogg
3. *Crisis at the Mill: Weaving an Indian Turnaround - Alvarez & Marsal*, by Anne-Marie Carrick, Claudia Zeisberger, Sankar Krishnan, and Nikhil Shah, INSEAD
4. *Unilever in Brazil: Marketing Strategies for Low-income Consumers*, by Pierre Chandon and Pedro Pacheco Guimaraes, INSEAD





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