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The
**CASE
STUDY
HANDBOOK**

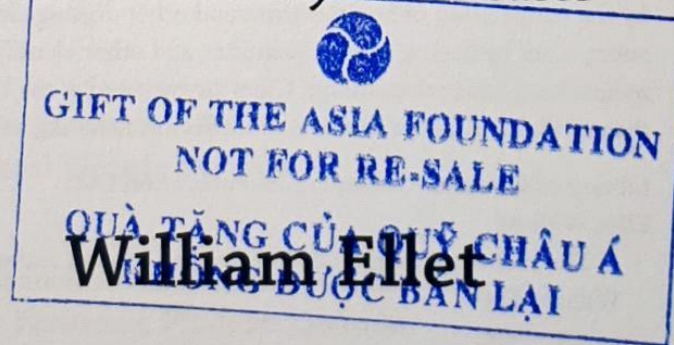
*How to Read, Discuss, and
Write Persuasively About Cases*

WILLIAM ELLET



THE
CASE STUDY
HANDBOOK

*How to Read, Discuss, and
Write Persuasively About Cases*



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INTRODUCTION

The Case Study Handbook has emerged from sixteen years of work with business school students. The impetus for it was a void in the guidance I could give them about case essays.

When I first worked with MBA students, I confined myself to conventional writing advice—coherent paragraphs; active voice; essays with a discernible beginning, middle, and end. The advice had an impact, but not as much as I hoped. Eventually, I realized that in case examinations, students often didn't know how to recognize the need for an argument or were unclear about how to write one. (This lack of knowledge isn't the fault of students; it's the fault of the writing instruction they have received.) I immediately placed argument at the forefront of my instruction. I experimented with thesis statements derived from an enthymeme. I tried Stephen Toulmin's syllogistic approach to the structure of an argument. In the end, I kept it simple: conclusion, reasons, and evidence.

Understanding when an argument is needed and how to construct one helped many of the writers. Nevertheless, I remained concerned about the trouble students had with case-based essays. Their writing was often characterized by fuzzy points of view, disjointed discussions of issues, and uneven use of evidence. It took me a long time to realize that these essays were unwittingly mirroring the cases the writers were supposed to be interpreting. Argument therapy was an incomplete solution to this problem. The students needed more, and I didn't have more to offer.

I knew that if there was a solution, it was in the cases themselves—but my jurisdiction was writing. Reluctantly, I sat in on case discussions and read many case exams. I read cases that students were writing about and compared them to the essays written about them. Some students intuitively knew how to respond to questions like these: What is the best decision? Why is this organization performing badly? I marveled at their clarity of purpose, despite the pressure of an exam, the challenge of a case, and the lack of information about the reader's expectations. I learned from the successful essays and those that fell short.

Gradually, the ideas in this book took shape, and I tried them out with MBA students to see if I could finally offer advice that spoke to all their needs.

The ideas weren't confined to writing. I found myself reverse-engineering a method that could be used for analyzing a case. I have been using the ideas detailed in this book for five years, and the results have been consistently positive in class discussion and case-based exams—not as judged by me but by the grades of MBA instructors who know nothing of the method and have no reason to know. I have been especially happy about the students who have been able to lift themselves out of academic trouble.

I make statements in this book that could be construed as a theory of cases. Readers, especially business academics, need to understand what this book is not. It has no theoretical ambitions. It is not a rhetoric or generative theory of cases or a taxonomy with exclusive categories. It does not break new ground on argumentation. It describes a pragmatic method grounded in observations about situations that frequently occur in cases and in students' responses to them. Strictly speaking, this book isn't about the case method because such situations also occur in the real world—not surprising, given that cases mirror the real world. The method doesn't account for every situation encountered in cases or every combination of situations. It simply takes advantage of the fact that many cases *do* involve certain well-defined situations.

Each of these situations has its own logic, and an awareness of it can help students read cases more efficiently, discuss them more effectively, and write about them more cogently. The links between analysis, discussion, and writing are a primary advantage of the method. However, it is *not* a substitute for the theories, frameworks, processes, and quantitative methods taught in business courses. In fact, it is intended to complement and facilitate their use. The method shouldn't detract or distract from them but accelerate recourse to them and focus their application.

The essays and essay excerpts in the book are based on the writing of MBA students. I have disguised the writing to protect the privacy of the authors. Because the original essays were examinations written under time pressure, I have also edited them so that they are better examples of the points made in the book. However, I restrained the editing to avoid the appearance of "ideal" examples. Only a single example of bad writing is used; it is a contrast to a good example on the same case. I think examples of bad writing tend to reinforce bad writing.

All of the cases in the book are from Harvard Business School. To avoid causing problems for instructors, the cases have been carefully researched to ensure that they are no longer being ordered for classroom use anywhere in the world. I use these inactive cases to demonstrate the method put forward in the book. I stress to the reader that my interpretations are no more definitive than anyone else's, and in those interpretations I include open questions

and other ways to look at the case. In other words, I do everything I can to discourage the notion of a "right answer" to a case. Some short excerpts from cases that are still taught have been carefully disguised to prevent a student from gaining an unfair advantage—although it's hard to imagine that the brief quotations could provide any even if they weren't disguised.

The Case Study Handbook hasn't been written with the pretension of being indispensable. On their own, business students develop approaches to cases that work and smoothly adapt to writing case-based essays. Nonetheless, too many students don't arrive at a reliable approach to cases, and that hinders their learning. The same can be said about writing—too many students struggle with it in business school. With the long-term growth in MBA enrollments and the widespread use of cases, the worldwide pool of students who will encounter the case method continues to expand.

This book is intended for all case method students, current and prospective. My hope is that the benefits will extend even more widely. Everyone gains if learners are better prepared for classroom discussion and written arguments—the student, peers, professors, and future employers.