

# Letter from the Editor

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## The value-added Instructor's Manual (IM) part 2

In the previous issue (13.1), I wrote about distinguishing your case by adding innovative pedagogy to the IM. While interesting pedagogy can make the case more publishable, a superior discussion of the theoretical underpinnings of the case analysis is another way writers can improve publication chances. I will focus on this approach in this letter.

## Scholarly contribution of the IM

In a letter to business deans, Jeffrey Shay (undated letter) (then Past President of the North American Case Research Association) pointed out that IMs contain many of the same sections found in empirical or qualitative research articles. The theoretical linkage section of the IM is similar to a literature review covering all the relevant theories (complete with citations) that apply to the case situation. The authors describe their research methodology in the IM to permit reviewers and users to evaluate the quality of the research. Discussion questions and answers are comparable to the presentation of research hypotheses and the testing of those hypotheses. For Shay, the IM becomes "where the scholarly rigor resides." AACSB, an international accreditor of management education, agrees, considering the IM instrumental in the acceptance of case writing as scholarly contributions. For *TCJ* (and many other case journals), improving the quality of the IM in terms of its theoretical linkages can boost your chances of getting your case published.

## Theoretical linkages

What should go in the Theoretical Linkage section of the IM? This section of the IM is intended to outline the theories or models the authors wish the students to utilize in analyzing the case. An annotated bibliography containing full citations and a short description of the material is another way to demonstrate your professional credibility. Instructors can use this list to assign additional readings to students to improve their depth of understanding and analysis. Reference lists also provide instructors with guidance for prepping the case quickly or remedy any theoretical unfamiliarity before teaching the case. It is also acceptable to include additional background information such as an advanced industry note, technical explanations or explanations of theoretical models that are new or unfamiliar.

Case writing experts recommend writing a draft of the theoretical linkage section of the IM during the early phases of the case writing process to ensure that the case will contain sufficient facts and data for students to apply the relevant theories and models.

## Using theoretical linkages to distinguish your case

So far we have discussed the minimum standard elements of the IM for publication in journals such as *TCJ*. How then can authors use the theoretical components of the IM to distinguish a case from others and thus increase the likelihood that it will be published? Several approaches come to mind.

First, authors could attempt to provide better theoretical linkage sections in the IM, by providing a more complete discussion of relevant theoretical issues or a more comprehensive listing of relevant readings. The challenge in providing a better theoretical section is that one must take care to balance the need for "more" with the needs of the audience (the busy instructors who will use your case and/or the harried journal reviewers). Authors must carefully select the theoretical models and frameworks covered to emphasize those that are most relevant to the teaching of the case.



Authors must also choose the depth of coverage to devote to each theoretical model. Well-known models such as Maslow's Hierarchy of Needs or SWOT may not need much exposition while less familiar, newer or cross-disciplinary theoretical references may need more. Demonstrate your expertise and currency in your field by including discussion of theories that are critical to achieving your learning objectives for the case without turning the IM into a full-fledged book.

Sometimes case situations do not perfectly align with prevailing theories and it is the author's obligation to call attention to this in the theoretical linkages section. Perhaps new technologies make traditional pricing strategies impracticable or if using agency theory results in the company doing something unethical. A well-written IM can illuminate this contradiction so that instructors will be able to assist students in recognizing these exceptions.

The *TCJ* review form asks reviewers the following question, "does the case/IM contain new and significant information or take a fresh perspective on existing information adequate to justify publication?" (Emphasis added). Cases are rejected by reviewers because, "no one needs yet another case that only can be used to do a SWOT analysis!" Other reviewers comment that none of the literature cited in the IM is more recent than the millennium. IMs that utilize only the most basic of analyses or worse yet have IMs that misapply key theories sink case publication. Here is where case writing mentors or co-authors can be helpful – have experts in the field review your draft IM for its theoretical currency, relevance and accuracy. Often another "pair of eyes" can see what our pride will not let us see. Remember that IM is your chance to demonstrate command of your discipline and your expertise with its tools and techniques. Write the IM to fully reflect your accomplishments as a scholar and to make a significant contribution to the knowledge in your field. Reviewers (and editors) will find it difficult to turn down a well-crafted IM that makes explicit the theoretical basis of the case and the theories tested in the analyses.

### In this issue

This issue reflects the global nature of *TCJ* – all of the six cases in this issue are set in organizations located outside of the USA. Five of the six have focal organizations outside North America. The cases are:

- Expat pay and compensation: fair or not fair? (David Desplaces and Steven Congden). The manager of engineering at Palm Oasis Engineering in Dubai expressed dissatisfaction with his compensation. The uncertainty of his continued participation at a key position came at a critical time for the company. This case provides an event for the analysis of HRM issues of a small company in a nontraditional, international context.
- St Croix oil refinery: choosing the right future (Victoria Geyfman and Christian Grandzol). Atlantic Basin Refining Inc. (ABR), a Virgin Islands company located on the island of St Croix, reached a tentative agreement with Hess and Petroleos de Venezuela SA to purchase the two companies' joint venture, Hovensa, LLC in November 2014. Hovensa operated the large St Croix oil refinery that had been closed since 2012, but the deal required approval by the Virgin Islands Senate. Although reopening the large refinery would generate a significant boost to the local economy, past operating losses, and financial and legal issues associated with Hovensa, raised concerns about the feasibility of ABR's proposal. The case is set in late 2014 as the government is working to ensure that the decision to allow ABR to purchase the refinery reflects the long-term interests of the Virgin Islands.
- Restructuring at Suzion Energy Ltd (S.R. Viswanath, Kulbir Singh, Jaskiran Arora and Durga Prasad). In 2007 Suzlon announced the acquisition of REpower of Germany, one of the top wind power companies in the world. It issued zero coupon and coupon bearing foreign currency (US dollar) convertible bonds (FCCB) amounting to \$760 million to finance the acquisition. Due to deteriorating business conditions the company experienced a sharp decline in profitability and stock price resulting in a debt overhang. At the same time the Indian Rupee depreciated leading to losses on largely unhedged, foreign currency coupon payments. The company had to restructure its capital structure to escape bankruptcy. Since FCCB holders did not agree to the restructure of the instruments, the company had to turn to senior lenders to restructure debt.

- Turnaround of the Professional, Applied and Continuing Education Department at the University of Winnipeg (Sylvie Albert). In mid-2014, the Continuing Education Department of a University in Canada has been transferred to the dean of an academic faculty. The department has had a history of budget deficits and the new dean and executive director were tasked to develop and implement a turnaround strategy.
- Daily Bread – a gourmet pursuit (Shinu Abhi and Vasanti Venugopal). Arjun Sekri, a Professional-turned-Entrepreneur, set out to establish the first branded gourmet industrial bakery in Bangalore, India in late 2002. The case is about his roller coaster ride in establishing a premium retail food brand in India. Though many of the stores did reasonably well, many things went wrong. After two years of rapid expansion, Arjun decided to shut down all the newly created stores and production units except the one in Bangalore which was doing well. By late 2009, Arjun wondered what should he do next?

## Reference

Shay, J. (undated letter), "Letter from NACRA Past President Shay to Deans and Department Heads", available at: [www.nacra.net/crj/crjReputation.php5](http://www.nacra.net/crj/crjReputation.php5) (accessed January 30, 2017).