

# Letter from the Editor

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## Case ideation – finding a “Good Idea” for writing a compact case

In an article published in *The CASE Journal*, the authors wrote about the initial step of writing a case, calling this process “Case Ideation” (Berte *et al.*, 2018). Case Ideation was defined as finding and selecting a good idea for a case, and the authors described ways either primary or secondary sources could inspire case writers. Primary sources included events like guest speakers for classes or at conferences, personal experiences or student connections to businesses via jobs or their families. Secondary sources included stories about organizations through media, websites, published documents or library databases. My personal experience with writing Compact Cases (cases that are 1,000 words or less) suggests that a different approach may be needed. To write a good Compact Case, we may need to consider the appropriateness of the idea for the Compact Case form. Ideas that will work beautifully for a full-length case may not be successful in the 1,000-word format of a Compact Case.

Compact Cases were pioneered by *TCJ* in 2015 “to make cases accessible and readable by the students [...] to encourage better learning and stronger learning outcomes” (Vega, 2015). Compact Cases are designed to be read in about 15 min, thus are limited to 1,000 words or about two pages. Students have responded well to the shorter case form, and *TCJ* has published more Compact Cases this year than ever before.

So, what makes a “good idea” for a Compact Case? I have struggled with this question regularly as I try to identify good ideas for Compact Cases for Compact Case Hackathons[1]. For each Hackathon, I generate seven to eight Compact Case ideas from current business periodicals. Small groups choose a case idea from those provided and attempt to write learning objectives and a draft of a Compact Case in the 4–5 h of the Hackathon session. After the session, participants typically need to finish the case exhibits and complete the writing of the Teaching Notes (TN) before submitting it to *TCJ*.

## Case ideation for compact cases

Although the primary and secondary sources identified at the top of this article can be utilized to inspire ideas for Compact Cases, the short form of the Compact Case requires additional considerations. For this issue, I will address the importance of FOCUS in case ideation for Compact Cases. There are several dimensions to the concept of focus that will be enumerated and illustrated with examples.

Focus: what is the case really about? Clark writes in *How to Write Short* (Clark, 2013) about the importance of focus in short writing. A tight focus gives the reader the feeling that all parts of the piece are working together to emphasize one thing or to make a particular point. All components of the composition provide the necessary evidence to support that one thing.

In writing a Compact Case the “one thing” that the case is really about may be a specific company, a particular learning objective or a distinctive incident. The topic for the Compact Case should be capable of being described in a single sentence or even just a few words. What is this case really about? The best Compact Case ideas have a narrow focus and avoid topics that are too broad for the compact form. A Compact Case focused on an employee walkout at Wayfair over sales to child immigration detention centers should work as a Compact Case where a more broadly focused case on consumer boycotts of multiple retailers due to sales to immigration detention centers might not. By zeroing in on a specific organization and event, the first example has a sufficiently narrow focus that could be covered in 1,000 words or less.

I recently attempted to write a Compact Case that would provide students with an opportunity to examine the strategic tradeoffs in a situation involving multiple stakeholders. After writing about



700 words, I realized that there were too many distinct stakeholder groups in the situation to accomplish this learning objective in the remaining 300 words. The final version of the case was about 2,700 words in length – still short, but not short enough to be considered a Compact Case. The focus of the case was too broad for the Compact Case form.

Compact Cases also work well if the focus of the case is familiar to the typical reader. A Compact Case about an incident at a familiar fast-food restaurant works nicely whereas a case about the manufacturing of fuel cells for electric vehicles would not. In the first instance, readers (especially undergraduate students) have sufficient experience with fast-food restaurants, so the author has little need to provide detailed descriptions of the ordering process, the appearance of the store, the menu or even the key competitors. The reader can supplement the case information with her personal experiences and general knowledge of the industry. In the fuel cell example, it is unlikely that many readers will be familiar with the issues of the manufacturing process and that even the most gifted author will be able to describe the process in sufficient detail for the typical reader to fully understand it in only 1,000 words.

It is also essential that the case focus is one that students will find exciting and engaging. In writing a Compact Case, the author must give careful consideration to the target audience for the case as what is compelling for an MBA student may be very different from that for an undergraduate. As I choose case ideas for Compact Case Hackathons, I think about my students and whether the case idea would generate active participation and discussion. Hopefully, you have experienced a great case as a student or as an instructor. These are the kind of cases that spark lively discussions that get at the heart of the matter of the case situation. The ones that students continue to talk about as they move on to their next classes.

One of my mentors and a former editor of the *Case Research Journal*, John Seeger wrote about these cases as ones that “sing.” Cases that “sing” leave instructors and students with “resonating memories of the class discussion, even long after the fact” (Seeger, 1992). Seeger identified four Ps for writing cases that sing – Problems, Pieces, People and Possibilities. A case that sings focused on terrific issues that left little doubt about the themes of student discussion – much like was previously discussed regarding the focus of the case. “Pieces” addressed student engagement in that the best cases were in new and intriguing contexts that stimulated student curiosity and interest. The “People” aspect suggested that cases needed the voices of real people to bring the case to life and to make it sing. Using dialogue and incorporating individuals into the case gave students a lens or perspective for viewing and appreciating the events of the case. Finally, exceptional cases needed to provide for “Possibilities” – the case must allow for the development of alternative courses of action. A case that sings engaged students by permitting a variety of options to be evaluated and actively debated. Seeger’s Four Ps of Case Writing was written about traditional cases but is equally applicable to the Compact Case form. As we look for exciting and engaging ideas for Compact Cases, it may be useful to ask – will this case sing?

In conclusion, case ideation for Compact Cases follows many of the guidelines for traditional cases. However, some case ideas are too complicated, too unfamiliar or too broad to be accomplished in the shorter form of a Compact Case. There is an old saying that if all you have is a hammer, everything looks like a nail. As authors, we must choose the right tool (case form) for the case focus – not all case ideas can be accomplished in the compact form. Sometimes we will write traditional cases because the issues are too broad, complex and unfamiliar to be accomplished in only 1,000 words. These cases will serve an essential pedagogical role by requiring students to wrestle with demanding issues that are broad, complex and unfamiliar. Sometimes we will write Compact Cases when the case has a tight focus that is both familiar and can be successfully summarized in a few words. These cases will promote effective learning by providing students with a more accessible and readable format. Whatever format we choose, it is imperative that the finished case “sings.”

### **In this issue**

This issue features three Compact Cases (see Table I) (the most in a single issue in *TCJ* history). These cases embody a new approach to cases pioneered by *TCJ*. Compact cases offer a revolutionary change in case research, writing and teaching by recognizing a need to change

**Table 1** Cases in this issue

<i>Case title and target audience</i>	<i>Authors</i>	<i>Synopsis</i>
<p>Can Chipotle compete by delivering “Food with Integrity?” Compact case Audience: undergraduate students in Strategic Management This case was initiated at the 2018 CASE Association Annual Meeting’s Compact Case Hackathon</p>	<p>Pauline Assenza and Michael Lewis</p>	<p>The founder of Chipotle Mexican Grill, CEO Steve Ells, was a restaurant innovator credited with creating the fast-casual experience. He believed that food, sourced and prepared responsibly, could help “cultivate a better world.” Unfortunately, he had had to step down after a continuing series of food contamination events drove away both investors and customers. In 2018, new CEO Brian Niccol was brought in from Taco Bell to reposition the brand and regain confidence. Was it possible to continue with Chipotle’s mission of “food with integrity” or was another strategy necessary?</p>
<p>Burned-N-Turned: feeding the fracking boom Compact case Audience: undergraduate strategic management courses</p>	<p>Joe Anderson</p>	<p>Partners are wrapped up in the “boom mentality” in the Bakken oil fields in 2011 and jump into their decision to open a food trailer restaurant to serve the oil field workers and others. But have they omitted important considerations for their business decision?</p>
<p>Put on the spot Compact case Audience: undergraduate courses in leadership and management with a focus on organizational justice</p>	<p>Chad Plenge, Jordon Swain and James Cornwell</p>	<p>The case describes the dilemma First Lieutenant Williams faces when his platoon sergeant unexpectedly leaves. Organizational norms and accepted practices suggest Lieutenant Williams should choose the most senior squad leader, Staff Sergeant Boyer. The departing Platoon Sergeant even recommended Staff Sergeant Boyer. However, based on recent observations, Lieutenant Williams felt Staff Sergeant Boyer may not be the best fit. Instead, the lieutenant considered choosing the newest squad leader, Staff Sergeant Harrison, who seemed to be highly proficient, but had yet to prove himself. Before the lieutenant could fully weight his options, Staff Sergeant Boyer confronted him about a decision</p>
<p>Bureau de Eventos: internationalization of an emerging country event planning company Audience: graduate and undergraduate courses in Entrepreneurship or International Marketing, executive training for tourism and event planning companies</p>	<p>Angela da Rocha and Vivian Steinhauer</p>	<p>This teaching case presents the trajectory of a Brazilian services company operating in the corporate events planning industry. The case explores the potential for the company’s international expansion, and the vision and engagement of the entrepreneurs, despite several barriers the company needs to overcome</p>
<p>Flight or fight: a case study in resolving ethical issues Audience: graduate ethics courses. Undergraduate accounting courses</p>	<p>David Christensen, Paul Schneider and Jeff Orton</p>	<p>The Chief Financial Officer (CFO) of a mining company was pressured to pledge collateral that was already pledged on another loan. The CFO courageously refused his supervisor’s request and resigned his position immediately (flight). In its ethics guidelines, the Institute of Management Accounting (IMA) requires its members to actively seek to resolve ethical issues internally before disassociating from the organization (fight). In addition, ethics writers Gentile (2010) and Badaracco (2001) suggest ways to communicate ethical concerns. In this case, accounting students learn how to resolve ethical issues using the ethics guidelines and suggestions by analyzing and writing about the experience of the CFO</p>
<p>Building, leading and sustaining a cultural enterprise: Martin Guitar in 2019 Audience: upper-level undergraduate students in management courses</p>	<p>Roland Kushner</p>	<p>In 2019, C.F. Martin IV (Chris) was in his fourth decade leading one of America’s oldest family-owned companies, C.F. Martin &amp; Co., Inc. Martin Guitar is a globally-known maker of fine guitars that are prized by collectors, working musicians, and amateur musicians. Chris was raised in the family business and took on the CEO’s position at the age of 30. The case describes the company’s management practices and the culture that has emerged from them. In 2019, at age 63, Chris confronted issues faced by his predecessors over multiple generations: How to prepare the company for succession and maintain its strong performance as a family-owned company in a dynamic industry environment</p>
<p>Philadelphia’s taxing decision: Pros and cons of a “soda tax” Audience: undergraduate courses in microeconomics, public economics, or managerial economics. MBA economics courses</p>	<p>Dmitriy Chulkov</p>	<p>This case study focuses on the imposition of the controversial “soda tax” on sweetened beverages in the City of Philadelphia in 2017 and considers the economic lessons that can be learned from Philadelphia’s experience with the tax. The tax was proposed as a way to raise the city’s revenue while reducing obesity. After the tax was enacted, the sales of sweetened beverages declined in the city, but increased outside the city’s borders. The receipts from the tax have been below projections</p>

both pedagogy and case writing to improve the learning experience of today's students. Designed to be read in about 15 min, compact cases can be assigned as homework or distributed in class. When all students have read the case, they can actively engage in class discussions, providing a peer-to-peer learning experience that makes the case method such a powerful learning tool. If you have not tried a Compact Case in your classes, we encourage you to give one or more of these three cases a place in your syllabus.

We also have included traditional length cases that explore important topics in strategic management, economics, leadership, ethics and marketing. These cases bring students valuable exposure to critical real-world challenges.

Each case in this issue has a strong Teaching Notes (TN) providing effective teaching strategies, theoretical linkages and complete answers and analysis to all discussion questions. *TCJ* TN have been rigorously peer reviewed to ensure that adopting faculty can teach these cases as well as the authors. Enjoy!

### Note

1. I have led six Compact Case Hackathons over the last academic year in the USA, Germany, Denmark and Finland. More than 175 participants have attended these Hackathons. We have published two Compact Cases in *TCJ* that were initiated in Hackathons and hope to see many more submissions in the future. The next CASE Association Annual Meeting in Portland, Maine, May 13–16, 2020, will feature a Compact Case Hackathon.

### References

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