A Guide to Case Writing

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General Guidelines for Writing Direct and Interactive Marketing Cases

BACKGROUND INFORMATION FOR CASE WRITERS

Marketing cases should deal with an issue that asks the student to develop a direct, CRM, interactive, or integrated marketing solution.

Only the problem is developed in the case. The solution or outcome should not be given. Solutions/outcomes may be shared in the Teaching Note.

The ideal case provides a compelling story to tell and an important problem to solve.

CASE BASICS FOR CASE WRITERS

A good marketing case provides students and faculty with the following:

- A description of a problem or opportunity for direct and/or interactive marketing managers.
- A method for developing students' thought processes and decision-making skills.
- A real-life, or at least realistic, learning experience.
- An opportunity to synthesize and apply knowledge from current and/or previous courses.

Be aware that case writers should avoid the following:

- Providing a well-defined problem with one "right versus wrong" solution.
- Submitting a case that is merely an example or illustration of a concept or idea.
- Presenting a case that illustrates the "right" or "wrong" way to handle a business situation.

A SIMPLE CASE OVERVIEW

Here is a basic, general outline to get you started writing your case:

1. Background on the organization. Creating a SWOT analysis is often beneficial.
2. General industry/environmental issues surrounding the case organization should be covered.
3. A deeper discussion of the marketing mix, with special focus on past marketing communications efforts, should be engaged in.

4. Provide a forthright statement of one or more issues that face the company, including alternatives (if any) that they are considering.

STEP-BY-STEP CASE WRITING PLAN

Write a Case Preview Before Your Interviews. This short summary may later inspire the first paragraph of the case itself. The preview should include the following:

1. Identification of the decision-maker.
2. Basic journalistic information: who, what, where, when, why.
3. Identification of the main problem or problems.
4. Initial draft of your exhibits list.
5. Intended use of the case (what type of class or classes, what level of student).
6. What the student will learn from the case.

Collect and Organize the Data.

1. In advance of your first visit with the case subject (company and/or agency) personnel, find out all you can about the company, its environment, its industry, key issues, and personalities in the organization.
2. Outline your questions for the interview. If you are meeting with different individuals separately, prepare appropriate questions for each based on his/her job title and involvement with the case.
3. Determine the real decision-maker(s) within the organization. Who will need to sign off on the case before you can submit/publish it?

Carry Out the Interviews. This is a key to success in case writing. The more facts, nuances, and clues you can gain during your interview(s), the better your case is likely to be.

1. Provide each interviewee with a sample copy of a completed case—preferably in advance.
2. Assure interviewees of the confidentiality of the interview and that you will get their approval of the final case to make sure no information they consider proprietary is presented unless "cloaked" to the subject company's satisfaction.
3. Don't promise that the case will be completed or published. Sometimes they are, other times they are not. The essential issue is that they are making a contribution to education. There is no specific benefit to the firm or the agency involved other than altruism, although from time to time the case does end up having some PR benefit or other benefit to the subject company.
4. Ask everything that you want to know. The interviewee always reserves the right to refuse to answer.

5. Ask if it is all right for you to take notes and/or record the interview. Do not assume it's all right to do so until you get permission.
6. Note the answers to your questions carefully. Follow-up questions are fine, but being argumentative or launching into proposed solutions is not appropriate. You are there to take a snapshot of what is or was, not to consult on what should be.
7. Immediately after the interview, take time to make additional notes about what you saw, heard and felt during the interview. Take notes on the company and/or agency surroundings, time of year, weather, and other "atmospheric" factors that may add interest to your case write-up.
8. Be sure to send a prompt and specific thank-you note to each individual you interview. If you promised to follow up in sharing or receiving information, do that promptly as well.
9. Promptly return any materials that were loaned to you.

Prepare the Case

1. Think about whether the case would benefit by repositioning, reframing, and redefining now that you have all the information at your disposal.
2. Develop and refine a detailed outline before you begin writing.
3. Refine and finalize your list of exhibits and make sure you have them all in your possession or have everything you need to create them. Hints on preparing good exhibits include:
   a. Tabulate data in tabular form.
   b. If you have information that is too long to be part of the case or is interesting but not integral to the text, present it as an Appendix or Sidebar.
   c. Check and re-check your figures and sources for accuracy.
4. Write in past tense.
5. Write a Case Introduction that includes a statement of the issues and background on the people and the problem or opportunity.
6. Include all the relevant facts you have in the body of the case. If something most readers would want to know is not available, say so. As in real life, cases seldom present all the information one would like to have to make a decision.
7. Add your own sources of information and cite them in the case. Good sources include:
   a. Trade journals.
   b. Annual reports and 10Ks.
   c. Internal memos and research reports provide and approved by the company.
   d. Standard & Poors/Moody's/F&S Indices (predicasts).

   e. Information from company web sites, web-based business sites, and online databases.
8. Draft the full case and revise as appropriate.
9. Obtain all necessary approvals for:
   a. Copywrited material.
   b. Company and/or agency approvals.
   c. Case release forms.
10. Prepare a Teaching Note/Instructor's Note that includes:
   a. Synopsis of case issues.
   b. Objectives for teaching.
   c. Your analysis as the author.
   d. Suggested teaching plans—perhaps several alternate plans for use in different types of classes or with different levels of students.
   e. Suggested do's and don'ts for instructors.
   f. Suggested questions for in-class discussion and/or assignments including individual and group work.
   g. An epilogue if available and appropriate, to explain what happened as the case situation played out.

Present the Case

1. Submit everything in MS Word, single-spaced, Times New Roman, 12-point type.
2. Place all exhibits, tables, and charts at the back of the case, not in the body of the case. Refer to these items by number in the body of the case.
3. Provide all references on a reference page at the end of the case. Refer to references by number in the text.
4. For best results in having your case published in the readings and cases book, make your case as timeless as possible. For example, say "in May of a recent year" rather than "in May of 2007," and when providing charts and graphs with years on them, label them "current year," "previous year," etc., rather than with actual years.
4. All cases to be used for teaching should include a Teaching Note. For examples of Teaching Notes, contact Susan K. Jones at *joness@ferris.edu.*

A Few Final Suggestions . . .

- A case is not just an example. It should include people and personalities.
- It is acceptable to disguise companies, people, and data if the case company requires it.
- Provide students with a good mix of clear versus hidden issues to discover.
- Both students and faculty appreciate questions at the end of the case. This helps frame the initial approach.
- Provide a good mix of clear versus hidden issues for students to discover.
- CASE WRITING IS HARD WORK—we are here to help if you need us.

BACKGROUND INFORMATION FOR CASE WRITERS
For the CADM/DMEF Case Writer's Workshop

Cases submitted to the Case Writer's Workshop should deal with a marketing issue where the student is asked to develop a direct, CRM, interactive, or integrated marketing solution.

Only the problem is developed in the case. The solution or outcome should not be given. Solutions/outcomes may be shared in the Teaching Note.

The Case Writer's Workshop strives to provide contacts with willing and appropriate companies that have compelling case stories to tell and to organize and group case writers into appropriate teams. You also have the option to find your own case subject and make your own match with other writers or to write a case on your own.

And a final note:

CASE WRITING IS HARD WORK. We are here to help if you need us.

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