

## **IDEAS, OBSERVATIONS, AND INQUIRY**

# **CASE WRITING RECONSIDERED** ---

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Recently, a reviewer of a teaching case submitted to a national conference on case writing wrote in his or her review,

The case has a decision focus, however, it is not the purpose which the author wishes to emphasize, as indicated in the instructor's note. . . . Thus, the managerial effectiveness of the decision focus is questionable in the present form of the case.

This reviewer's comment has a normative ring to it; that is, it presumes the primary purpose of a teaching case is to provide students with the opportunity to identify with management and to make a managerial decision. The teaching case referred to above detailed a new employee's initial encounters with an organization, from applying for a job, through orientation and training, to

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her first few weeks at the organization. Although she was a bright and capable worker, the new employee questioned her choice to join the organization and pondered the decision to stay or not. Although her pay was better than it had been in her previous job, her social needs were not being met as she had not made any friends. She also interpreted many of the organization's actions as demeaning and uncaring; for example, her job-specific training was held in the noisy employee cafeteria, and she was handed a list of instructions her manager read to her. As if being read to like a school child was not enough, the new employee was asked to place her initials after each instruction was read to her, indicating that she understood what had been said. The new employee found this type of training insulting. In addition, the uniform she had to wear was dowdy and uncomfortable, yet employees in other departments had smart-looking, professional uniforms. She was embarrassed to have to wear her uniform and felt management did not care about how she looked or felt. Her experience illustrates the process of socialization as well as the sense making that new employees do while trying to understand the work setting they have entered. However, management in this organization was oblivious to this new employee's feelings and thoughts regarding her experience. How can this case be written from the standpoint of a management decision? It is management's lack of awareness of the problem and the consequences of this that are at issue in this particular case. This case and the reviewer's comment raises a question seldom asked of late: Is decision making the preferred purpose of a teaching case?

Management and related business courses have, for decades, warned students against seeking and believing that a "one best way" of thinking and behaving managerially exists. The case method was initially invented, and has subsequently flourished, on the belief that business people must be able to deal with complex, often messy circumstances and multiple issues arising out of new situations in an ever changing environment (Dewing, 1931). Although over the years many kinds of cases in several media have appeared, at present there seems to be an ever increasing emphasis on the writing and teaching of primarily decision-focused cases. If this is so, case teachers may be inadvertently forsaking the range of educational opportunities associated with the case method.

In this article, we will argue three claims. The first is that the contemporary ideal case is becoming a decision-focused one. Second, that this convergence may be sometimes dysfunctional for managerial teaching and learning. And third, that case writers and teachers might usefully rediscover the roots of the case method and once again encourage case variety. Our argument will flow as follows. Initially, we will sketch what seems to be the current ideal for cases and provide some evidence of a convergence toward a

decision focus. Second, we will note some possible dysfunctional consequences of mostly using decision-focused cases. Third, we will revisit the historical essence and purposes of the case method. And last, we will tentatively suggest an enlarged classification of case objectives.

## The Contemporary Ideal Case

Recently, Blunden and McGuiness (1993) stated that what distinguishes a real case from others is that real cases "must be (a) based on situations that were actually faced by practicing managers, and (b) have a decision focus" (p. 112). It is interesting that this assertion echoes the classic statement of what a case is, noted more than 40 years ago by Gragg (1954):

A case typically is a record of a business issue that actually has been faced by business executives, together with the surrounding facts, opinions, and prejudices upon which executive decisions have to depend. These real and particularized cases are presented to students for considered analyses, open discussion and final discussion as to the type of action that should be taken (p. 6).

More recently, in response to the question, What is a case? Mauffette-Leenders, Erskine, and Leenders (1997) state,

A case is a description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem, or an issue faced by a person (or persons) in an organization. The case allows you to step figuratively into the position of a particular decision maker (p. 2).

This decision, action-taking feature of a case has been repeatedly restated, perhaps no more eloquently than in Christensen and Hansen's (1987) definition of a teaching case.

A case is . . . a partial, historical, clinical study of a situation that has confronted a practicing administrator or managerial group. Presented in narrative form to encourage student involvement, it provides data—substantive and process—essential to an analysis of a specific situation, for the framing of alternative action programs and for their implementation, recognizing the complexity and ambiguity of the practical world (p. 27).

Few today would debate that the contemporary "ideal" teaching case is distinguished by the following three features:

1. *A case describes a real situation.* It is based on fieldwork; it thus brings reality into the classroom. Guides for case writing (e.g., Erskine, Leenders,

Mauffette-Leenders, 1981) make this clear by stating what teaching cases are not; that is, they are not fictional accounts of situations (so-called armchair cases); they are not simply sets of organizational data (e.g., balance sheets or other records); and they are not articles from the business press about a particular company or industry.

2. *A case is reasonably complex.* It is information rich and does not gloss reality. Cases should provide information sufficient to allow the student to identify with the case characters, situation, and organization involved as well as to confront the intractability of situational specifics (i.e., the absence of needed information, some nonrelevant information, and information in different forms and of varying importance).
3. *A case is decision focused.* It provides students with one or more opportunities for the analysis of problems and deciding what appropriate management action might or should be.

These ideals are, of course, occasionally disregarded. One popular strategic management case, "Robin Hood" (Lampel, 1994), for example, is fictional. Similarly, the questioning of an executive by a class to discover the facts of a situation—interestingly, the precursor of written cases at the Harvard Business School (Copeland, 1958)—is reportedly enjoying a rebirth in some schools. Such noted exceptions do not negate the existence of these three distinguishing features of the contemporary "ideal" teaching case, and we are not contesting these features. However, we are focusing on the third feature (decision-focused cases) and asking if this feature really is believed to be a key one.

Considerable documentary evidence exists that suggests that a "good" case is decision focused, as the following recent sample demonstrates (emphasis added in each bullet point):

- "Is the central problem important to the course? Is there a clear *decision focus*?" (North American Case Research Association, 1996).
- "Is there a clear *decision focus*?" (item on the Current Case Review form, Western Case Writers Association, 1997; and on the Competitive Case Submission Evaluation form, Eastern Case Writers Association, 1998 ).
- "Cases describe a situation in sufficient detail to permit the reader to understand, analyze, and *decide* what should be done" (Edlund, 1996).
- "Cases accepted for publication will deal with issues important to their disciplines. Usually, they will be framed around problems facing some *decision maker* in the organization" (editorial policy, *Case Research Journal*, 2000).
- "It normally contains relevant data about the situation that is available to the key person in the case. Background information rounds out the scenario, giving the student a clear starting point to gain a better understanding of the *decision maker* and to devise a solution" (What is a Case Study? brochure of the International Case Clearinghouse, 1996).

- “*Decision-oriented*, field-researched cases are especially welcome” (Call for Papers, North American Case Research Association, 1999).

To test the criterion that teaching cases should have a decision focus, we surveyed the attendees of the 1997 North American Case Research Association annual conference (Rainsford, Lundberg, & Young, 1998). We chose this population because of its presumed expertise with teaching cases. Usable surveys were returned from 102 out of the 114 attendees for an 89.5% response rate. This sample was quite experienced; the average number of years teaching cases was 11.6 and the average number of cases written was 11.2. Among the questions on the survey, we asked respondents for their degree of agreement with the following statement: “A teaching case should require readers to make and defend a decision.” On a 7-point scale, from 1 (*strongly disagree*) to 7 (*strongly agree*), the mean response was 5.34, with a standard deviation of 1.69, and the median was 6.0. This finding, in combination with the considerable documentary evidence provided earlier, suggests that a decision focus is, in fact, widely believed to be a key feature of a teaching case.

## The Learning From Decision Cases

Student exposure to decision-focused cases arguably enables useful learning. In general, according to Mauffette-Leenders, Erskine, and Leenders (1997), the discussion of such cases

enable you to learn by doing and by teaching others. What you learn becomes deeply ingrained and stays with you. The repetitive opportunity to identify, analyze, and solve a number of issues in a variety of settings prepares you to become truly professional in your field of work. . . . Cases provide an opportunity to become deeply involved in decisions actually faced by real people in real organizations, to take ownership, to feel the pressure, to recognize the risks, and to expose your ideas to others. (p. 3)

More particularly, a host of managerially relevant skills are touted as being acquired through the repeated discussion of decision-focused cases. Frequently mentioned, for example, are communication skills, persuasion skills, problem-verification skills, and consequence-assessment skills, in addition to more general problem-solving and decision-making skills (e.g., Christensen & Hansen, 1987; Easton, 1992; Erskine et al., 1981; May, 1984; Vance, 1993). Although few would contest the utility of such skills for managers, what else might be inadvertently learned from the repeated or exclu-

sive exposure to cases in which students are required to identify with a manager and his or her situation and recommend and justify an action or decision, hopefully ameliorating a problem or situation the manager is confronted with? Several meta-lessons come easily to mind, including

- Decision making may come to be understood as the central and/or crucial activity of managers through simple repetition. Planning, organizing, controlling, and other management functions would thus tend to be underappreciated.
- An emphasis on decision making would likewise tend to de-emphasize or even depreciate related activities such as problem identification, information search, and problem prevention.
- Because decisions ostensibly solve problems, problems will tend to dominate the mind-scope. Because problems are presumed to be solvable, anything loosely referred to as a problem will seem to demand a solution, thus undervaluing the real frequency of paradoxes or dilemmas as well as situations simply not amenable to change. Coping and experimentation will also tend to be underappreciated.
- The repeated making of discrete decisions underplays how problems may be imbedded in larger systemic issues, or serially linked, or how they may cause subsequent problems.
- Making decisions over and over for managers in cases may implicitly teach that people should make conscious decisions and make them as rationally and analytically as possible. If so, implicit preference choices, group and larger system decision processes, and nondecisions become suspect; and, emotional, intuitive, symbolic, and politically based decisions become devalued as well.

The “trained incapacities” (Merton, 1940) just noted need not result from the repeated use of decision-focused cases and can conceivably be avoided by wise and skillful case-discussion instructors. Their likelihood, however, does seem to be associated with them. Let us be clear here that we are not arguing against decision-focused cases—rather we are questioning the contemporary convergence that they represent the ideal. Such an ideal, we are suggesting, may be implicitly saying to case writers, case teachers, and students that there is a one best way to structure teaching cases and even to behave as a manager. Perhaps it is time to revisit the invention of the case method as a way of gaining perspective on the possibility of, and the learning objectives associated with, case variety.

### **Case Method Essence and Variety**

The case method rests on a philosophy of professional education that mates knowledge and action. This philosophy, in the words of Whitehead

(1947), "rejects the doctrine that students should first learn passively, and then, having learned, should apply knowledge" (p. 218). Instead, the case method has evolved from principles elucidated by John Dewey—that education consists of the cumulative and unending acquisition, combination, and reordering of learning experiences. In Dewey's own words (quoted in Barnes, Christensen, & Hansen, 1994),

The sole direct path to enduring improvement in the methods of instruction and learning consists in centering on the conditions that exact, promote, and test thinking. Thinking is the method of intelligent learning, of learning that employs and rewards mind. We speak, legitimately enough, about the method of thinking, but the important thing to bear in mind about method is that thinking is method, the method of intelligent experience in the course that it takes. (p. 9)

Dewey further notes (quoted in Soltes, 1971) that,

Only by wrestling with conditions of the problem at hand, seeking and finding his own way out, does he think. . . . If he cannot devise his own solution (not, of course, in isolation, but in correspondence with the teacher and other pupils) and find his own way out, he will not learn, not even if he can recite some correct answer with one hundred percent accuracy. (p. 81)

In the 1930s, the intended role of case studies was captured in the classic statement by Gragg (1954), quoted earlier, about "real and particularized" situations needing "considered analyses" and "open discussion" and "final discussion as to the type of action that should be taken." By the 1950s, Lawrence (1953), somewhat more operationally, remarked that a good case

is the vehicle by which a chunk of reality is brought into the classroom to be worked over by the class and instructor. A good case keeps the class discussion grounded upon some of the stubborn facts that must be faced in real life situations. It is the anchor on academic flights of speculation. It is the record of complex situations that must be literally pulled apart and put together again for the expression of attitudes or ways of thinking brought into the classroom (p. 215).

From the beginnings of the case method, some informed case writers have played down decisions. Teaching cases has been variously described as a description of episodes of practice, a selection of reality, a slice of life, a story designed and presented as study material, an exercise, a puzzle, or a problem (McNair, 1971). However characterized, the six critical elements of teaching cases have been recently identified by Barnes et al. (1994) as (a) a focus on

understanding the specific context; (b) a sense of appropriate boundaries; (c) a sensitivity to interrelationships, the connectiveness of all organizational functions and processes; (d) an examination and understanding of any administrative situation from a multidimensional point of view; (e) the accepting of personal responsibility for the solution of organizational problems; and (f) an action orientation.

We surmise, along with Christensen (1991), that the original intent of teaching cases was to enhance discussion—for appreciation, for understanding, for analysis, and for action—in the service of thinking. Cases that generally enhance thinking and foster discussion can of course embrace a variety of more pointed educational objectives as well as a variety of case forms. In what is perhaps the earliest and only categorization of cases, Dooley and Skinner (1977) delineate eight types of cases in terms of their educational objectives, of which only two mention action and none specify decision making per se. Over the years, in fact, we believe a wide variety of case types have actually been developed in terms of form (i.e., the amount and type of information provided, the degree of order and structure given to the information) and intended learning outcome (e.g., problem identification, information searching and assessment necessitated, application of conceptual frameworks, contextual understanding, problem prevention, system redesign, etc.).

The preliminary listing of case types that follows illustrates the extant variety of cases presented in live, written, video, film, and multimedia formats we have found over the years in our experience in writing and teaching with cases. We are not claiming that this list is exhaustive or comprehensive; we are merely suggesting that a variety of case types exist that differ according to format and/or intended learning outcomes. They are as follows:

1. "Iceberg" cases. These types of cases require the reader to apply one or more conceptual models that prompt the designation of additional, relevant information "below the surface." An iceberg case typically provides little information and little structure to the information provided, and essentially provides a quick introduction to a situation that may or may not require a decision. Students are urged to consider what additional information they might like to have and where and how they might be able to get it if they were in the principal actor's position. Such a case forces the reader to think through and compare alternatives, applying known conceptual models. The intended learning outcomes of iceberg cases are problem identification, information gathering and assessment, and application of conceptual models, ideas, and/or theories.
2. "Incident" cases. These types of cases are typically found at the end of textbook chapters. For example, at the end of a chapter on planning in a management book, a case on planning will be presented. The case often describes a sin-



gle incident in somewhat specific detail, circumscribed by time and place. The historical, organizational, and environmental context are played down or ignored. The student's task is to compare the incident with either generally accepted practices and/or his or her own experience. Issues of problem identification are addressed, as well as information gathering. Incident cases may be used to stimulate discussion, and because of their lack of information regarding context, may be used like iceberg cases described above. That is, students may be asked to determine what additional information is necessary or helpful and to surmise how the environmental, organizational, and/or historical context of the incident would impact the situation.

3. "Illustrative" cases. This type of case describes an event or process factually, and the information is fairly highly structured to illustrate the situation. The amount of information offered may vary from moderate to high. The student's task is to understand one or more business practices and how they are applied in the real world. This type of case brings reality into the classroom and demonstrates to students that the lessons in textbooks and lectures may not always work out as flawlessly as implied in the classroom.
4. "Head" cases. In this type of case, one or more principal actors' interactions, activities, thoughts, and feelings are described. A moderate to high amount of information is provided, although the information may be loosely structured (it does not lead the student). The student's task is to surface the assumptions, reasoning, attitudes, or needs—to basically get inside the principal's head—and see how these are manifested in patterned action and interaction.
5. "Dialogue" cases. These cases describe the interactional specifics between or among two or more individuals. Typically, a moderate amount of information is provided, with the structure quite low. The student's task is similar to that of the head case described above—that is, to empathize with, surface, or analyze the beliefs in the dialogue, and to look at the interactional dynamics between the actors and the consequences of style.
6. "Application" cases. This type of case describes the application of a management technique or describes a situation in which the student can apply some known technique. Such cases typically provide much information, but it may be highly unstructured. For example, an application case could describe a manager conducting or faced with conducting a performance appraisal. In this type of application case, the student's task is to state how the manager might conduct the performance appraisal and what the manager must take into account to effectively conduct a performance appraisal.
7. "Data" cases. These cases provide much information with no to moderate structure. Much of the information provided may be totally irrelevant to the issue or situation. The student's usual task is to find ideas in rich descriptions and/or to organize these data in some meaningful way (e.g., sifting through the data, attempting to separate symptoms from problems). They must order and separate the data, searching to see if a problem is worthy of their attention. By doing what most managers and consultants must do (sift through and organize data), students also learn to be better consumers of information.
8. "Issue" cases. In an issue case, a matter or point is in question (e.g., is the manager's behavior ethical?). Usually much information is provided in a moder-

ately structured manner. The student's task is to understand and appreciate the antecedents, contexts, and dynamics of this salient issue.

9. "Prediction" cases. These types of cases are typically written in a series (e.g., parts A, B, and C) and provide information in a structured format (a series). The student's task is to make a sequence of predictions about the focal actor's (person, unit) behavior or performance using some conceptual models. Part A of the case would be distributed to students, and they would be asked to make a prediction. Part B of the case would be distributed next, and the case discussion would focus on the students' prediction accuracy—why they were correct or why they were unable to predict correctly. The focus is on having students understand why they were more or less accurate, to see what information or alternatives they overlooked, and to see how their use of models aided their understanding and prediction accuracy.

The above can be contrasted with the prototype decision-focused case in which a manager and the decision he or she must make is provided in the case's opening paragraph. Although we accept that all types of cases require students to decide (e.g., is action required, which case information is relevant, what ideas or models aid understanding, what analysis is needed, what are the consequences of alternatives, etc.) and many types of cases may provide choice opportunities facing case characters, only decision-focused cases require the recommendation of a manager's decision for action taking.

Recapitulation. From its genesis (Copeland, 1954) through its early evolution to the present, the case method has promoted the enhancement of thinking about the concrete, complex, changeable situations that managers face by means of the repetitive study and discussion of a wide variety of descriptive cases. Clearly, in its philosophy and in the variety of cases developed, the case method has until recently eschewed a "one best way."

## **Toward Broadening Case Variety**

If the current emphasis on decision-focused cases may have some unintended consequences and, perhaps, has inadvertently narrowed the purpose of the case method, then a return to case variety seems warranted. What might this variety look like? At present, no comprehensive classification of case types exists beyond the very early one by Dooley and Skinner (1977) and our preliminary listing of various forms of cases above. Although such classifications might serve to revitalize case writing variety, formulating a comprehensive classification of cases will, no doubt, require many minds and successive refinements. To stimulate this endeavor, we next offer our initial thinking.

Taking the enhancement of thinking through the study and discussion of cases as our touchstone, we suggest a useful way to begin encouraging more variety in types of cases is to focus on learning objectives for cases. We further suggest that there are three broad areas of case objectives that support the aim of generating discussion for the enhancement of managerial thinking. These areas are as follows: (a) those that focus on acquiring, appreciating, differentiating, and using ideas and information (e.g., finding ideas in case data); (b) those that focus on identifying types of issues, contextually and historically (e.g., problem identification); and (c) those that focus on formulating and implementing action (e.g., action planning). Within each of these three areas, of course, more pointed learning objectives may be specified. Table 1 presents our elaborated classification of case objectives. Examination of this table shows that it includes the activities of most conventional case work such as problem identification (2-A), analysis (1-D), and decision making (3-A). The classification, however, casts these conventional activities in less restrictive language; that is, problems become issues, analysis becomes systematic understanding, and decision making becomes choice making and justification. Real variety in cases, however, is promoted by the inclusion of the many other learning objectives as specified in Table 1, which unveils the intellectual activities that occur before, during, and after conventional casework.

## Concluding Commentary

It is commonplace to hear that the world facing managers today and tomorrow is one in which the only constant is change and in which work is becoming increasingly complex, interdependent, and uncertain. Managers dependent on applying ingested facts, the asserted best practices of others, and general principles will clearly be at a disadvantage in such a world. The case method, therefore, seems to be more useful today for management education and development than ever before. The value of casework, we have argued, is blunted when solely or overly focused on decision making. At a minimum, cases need to more actively promote issue recognition and action implementation and, more optimally, return to their original purpose of enhancing learning by fostering better thinking. Thus, we have argued for the relegitimization of writing and using a wide variety of cases. The current drift toward idealizing decision-focused cases is tantamount to a one best way, clearly an unsupportable position to hold in the modern world.

**TABLE 1**  
**A Classification of Case Objectives**

1. Case Objectives Focused on Acquiring, Differentiating, and Using Ideas and Information	2. Case Objectives Focused on Issue Identification and Differentiation	3. Case Objectives Focused on Action Formulation and Implementation
<p>A. Identifying relevant information</p> <ul style="list-style-type: none"> <li>• Differentiating among facts, inferences, speculations, and assumptions</li> <li>• Distinguishing prescription from description</li> <li>• Advocating empathy and active listening as instrumental for gathering information</li> </ul>	<p>A. Identifying types of issues</p> <ul style="list-style-type: none"> <li>• Being able to differentiate symptoms from underlying issues</li> <li>• Knowing the difference between problems (discrepancies between goals and performance) and predicaments (goal inconsistencies within the same entity and/or between entities)</li> <li>• Seeing issues in combination (e.g., as linked, nested, and messy)</li> </ul> <p>B. Discovering ideas and knowledge in information</p> <ul style="list-style-type: none"> <li>• Recognizing different types of ideas (e.g., concepts, constructs, variables)</li> <li>• Appreciating the differences among kinds of knowledge (i.e., association, causation, superstition)</li> <li>• Gaining skills in surfacing actionable beliefs (i.e., beliefs where some activity leads to some outcome)</li> <li>• Recognizing the contextual contingencies of knowledge</li> </ul>	<p>A. Making and justifying choices</p> <ul style="list-style-type: none"> <li>• Criteria formulation and timing for choice</li> <li>• Appreciating the consequences of action versus nonaction</li> <li>• Understanding the benefits and pitfalls of individual and group choices</li> <li>• Using appropriate authorization and legitimization processes</li> </ul> <p>B. Concerns associated with implementing action</p> <ul style="list-style-type: none"> <li>• Understanding the impact information-seeking has on action</li> <li>• The feasibility of intervention plans</li> <li>• The specifics of intervening (e.g., who, where, when, and how)</li> </ul>

(continued)

TABLE 1 Continued

<ul style="list-style-type: none"> <li>• Understanding the functions of models and conceptual frameworks</li> </ul>	
C. Appreciating reality	C. Learning to see and use criteria for judging issue importance
<ul style="list-style-type: none"> <li>• Knowing that the relevant reality is socially constructed</li> <li>• Being able to differentiate enacted versus objective reality</li> <li>• Acknowledging the inherent uncertainties in all situations</li> </ul>	<ul style="list-style-type: none"> <li>• Feasibility, time, development, survival, growth</li> <li>• Who "owns" the issue (i.e., is responsible for issue resolving action)</li> <li>• Which issues impact which stakeholders</li> </ul>
D. Acquiring systematic understanding	D. Sensitization to syndromes of issues
<ul style="list-style-type: none"> <li>• Selecting ideas/models/theories appropriate to a situation</li> <li>• Using and comparatively assessing analysis, common sense, and intuition</li> </ul>	<ul style="list-style-type: none"> <li>• Related to complexes of people, technology, structure and/or task systems</li> <li>• Embedded in history and other exogenous and endogenous constraints</li> </ul>
E. Enhancing prediction	
<ul style="list-style-type: none"> <li>• Testing insights against experience</li> <li>• Factoring in one's own frame of reference</li> </ul>	
	D. Appreciating the constraints on action
	<ul style="list-style-type: none"> <li>• Resources, time, context</li> <li>• Person and system competencies</li> <li>• Anticipated negative consequences</li> </ul>
	E. Assessing action/learning from experience
	<ul style="list-style-type: none"> <li>• Appreciating the difference between proactive versus reactive assessment</li> <li>• Seeing anticipated, and being aware of unanticipated, consequences</li> <li>• Knowing that assessment is or can be reinforcing to actions taken</li> <li>• Understanding that socialization and diffusion processes are often necessary to institutionalize actions</li> </ul>
	C. Understanding types of action
	<ul style="list-style-type: none"> <li>• Knowing when to cope, solve, or prevent</li> <li>• Appreciating the use of direct versus indirect action</li> <li>• Being able to use available techniques and practices</li> </ul>

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