

Writing case studies for publication

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About the Faculty



- Assistant Professor Health Policy and Leadership
- Health Policy Research Leader
- MPP Program Head, MBRSG
- President, AIB-MENA Chapter
- PhD was attained at the age 30.
- Trinidad & Tobago
- https://www.google.ae/maps/place/Trinidad+and+Tobago/@20.3917871, 25.5229093,4z/data=!4m5!3m4!1s0x8c3607976350b6c5:0xff082855c639f127!8m2!3d10.69
 1803!4d-61.222503
- Over 13 years experience in academia
- Over 85 publications
- www.linkedin.com/in/iamoonesar

Agenda



- Key steps
- Differences between teaching/learning and research cases
- Writing and structuring a case
- What makes a good case and common mistakes
- Copyright and plagiarism
- After submission
- Resources



Registration



 In order to get the electronic certificate, we ask the participants to register at the session/workshops via:

https://dsgir.eu.qualtrics.com/jfe/form/SV_b1q22o5eSpp6IhT

Need for Research Brokering



Bringing academia and research together in the classroom

(Stephens Balakrishnan and Moonesar, 2017)

- Rising unemployment (ILO 2016; WEF 2016)
- Education is unprepared for obsolescence of jobs, rising uncertainty and need for global competencies (Javidan et al., 2010; Manning, 2003; Suutari 2002)
- Human capital (skills, experience and effort) accounts for 65% of global wealth (WB, 2017)
- Low global interconnectedness (DHL, 2016)
- Policy and academia exist on different planes (Newman et al., 2016)

Stephens Balakrishnan & Moonesar, 2018

Teaching Case



"a partial, historical, clinical study has confronted a practicing actions

managerial group. Presented in narrative form to

Uncertainty is here to stay! Need to learn from mistakes as important as learning from successes.

t, it provides data ential to an analysis of ning of alternative

Story-telling - a

cultural art form

recognized in the

action programs, and for their implementation recognizing the complexity and ambiguity of the practical world." (Barnes et al., 1994: 44)

Stephens Balakrishnan & Moonesar, 2018

What do we mean by research you can use?





Research that has an impact

What do you mean by impact?

Benefits:



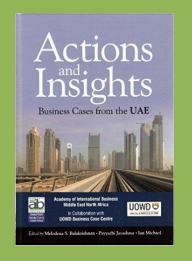
Organizational Point of View

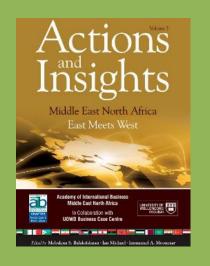
- Preserve organizational memories & tacit knowledge (Dworman, Kimbrough et al., 1997; Swap, Leonard & Shileds, 2001)
- Documents people and the situation (Sierhuis and Clancey, 1997)
- Helps with dissemination of knowledge within an organization, allowing active remembering and leading to action (Bannon and Kuutti, 1996; Denning, 2001: 12).
- Brings experience back into the classrooms
 (Bonwell and Eison 1991)

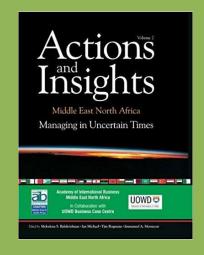
Stephens Balakrishnan & Moonesar, 2018

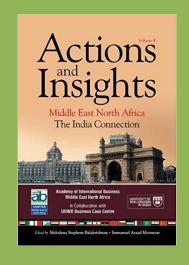
AIBMENA Case Study Collection

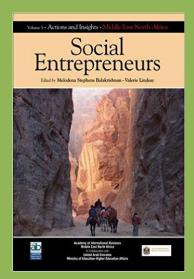


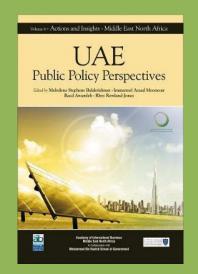














AIBMENA Case Study Collection



- 110 cases and perspectives since 2010
- As of Volume 6, out of 88 cases, a majority of the cases were using personal networks (62.5%), others are cold calls (25%); alumni (2.3%), and referrals (10.2%)
- 90% of the cases wrote about or worked with decision makers who were top executives within the case company
- Reach: AIBMENA has 37 cases uploaded on the Emerald Emerging Markets Case Study website. As of November 2017, these cases had a cumulative download of 25,175.
- Impact in research research grants, publications and collaboration

Teaching/ Learning Case Studies and Emerald



- <u>Emerald Emerging Markets Case Studies</u> collection a welcome addition to the emerging markets content.
- 150 + peer-reviewed teaching cases from and about the world's most exciting economies.
- All Business and Management disciplines covered.
- Partners include: CEEMAN; AIB MENA; AABS.
- EEMCS authors enjoy wide international dissemination: 11000+ downloads in the first year.





Keep the key steps in mind

- 1. Learning/ Research Objectives.
- Identify Case Lead through documents, interviews, observations.
- Establish which documents/ people you will need access and gain access.
- 4. Collect information on case through further documents, interviews, observation.
- 5. Write case and get permission to publish.
- 6. Write the Instructor/ Teaching Notes. Try out the case to see if there is enough information.



Teaching Cases and Research Cases

Teaching/ Learning Cases:

- facilitate training, knowledgesharing
- have a story line that group can get immersed in and relate to
- highlight practical applications of theory
- reflect the ambiguity of the situation and need not have a single outcome, the intent being to create a dialogue, encourage critical thinking and lead to research and evaluation of recommendations.

Research Cases:

- An in depth look at a particular situation, event, entity.
- A methodology used to inform quantitative research findings/ identify areas where more quant is needed.
- Associated with qualitative research, ethnography, field study, and participant observation

Teaching Cases and Research Cases (cont...)



In both cases you should:

- Have a case study protocol (after Robert K. Yin)
- Collect relevant information from your case organization or case lead.
- Ensure you have correct documentation.
- Get permission letters.

Considering co-authorship



Where to find a co-author

- Supervisor or colleague
- Conferences
- Publications

Benefits

- First time authors
- Demonstrates the authority and rigour of the research
- Especially useful for cross-disciplinary research





Considering co-authorship Tips

- Ensure the manuscript is checked and edited so that it reads as one voice
- Exploit your individual strengths
- Agree and clarify order of appearance of authors and the person taking on the role of corresponding author
- Distributing work
- Leader
- Extending your work



Emerald

Writing the case

- Past tense
- Identify and establish an issue/problem which can be used to teach/ explore a concept or theory
- The opening paragraph :
 - WHO is the main leading role (or character)?
 - WHO is the key decision maker?
 - WHAT is the nature of the issue/problem?
 - WHEN did the case take place? Specify the date line in this paragraph.
 - WHERE did the case take place; what organization?
 - WHY did the issue/problem arise?



Writing the case

Body of the Case

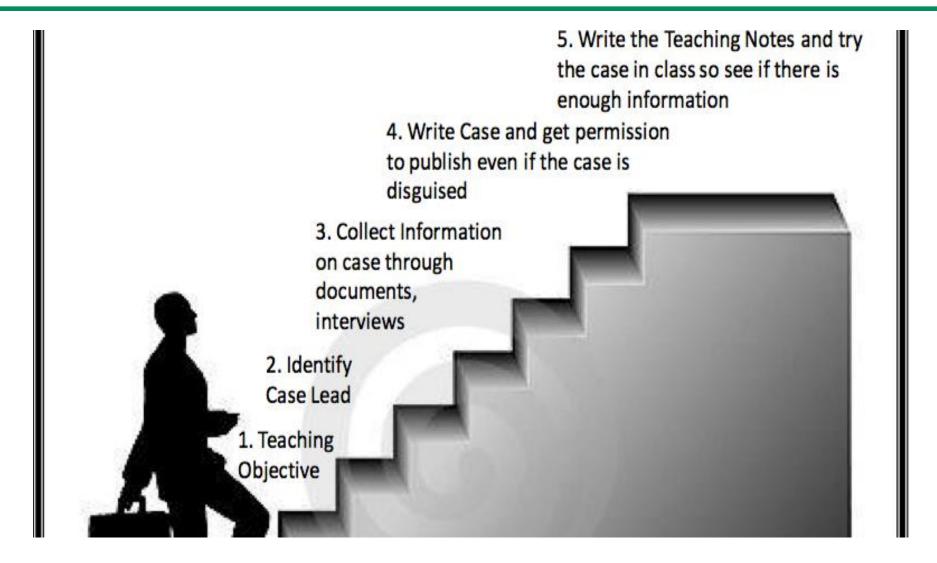
- Tell the whole story usually in a chronological order
- It typically contains general background on macro environment, organisational background, and the details of the specific issue(s) faced.
- Tell more than one side to the story so that learners can think of competing alternatives.

Concluding Paragraph

 Provide a short synthesis of the case to reiterate the main issues, or even to raise new questions.

PART II: Or How not to write a teaching case!





Steps to Writing a Case I: Teaching objective



What is this case intended to highlight from an educational point of view?
Subject Discipline? Across discipline areas?
Theory concepts?
Skills required? Research, writing, presentation, oral

issues? Ability to articulate specific solution that are

implementable and to be able to justify them? Citations?

presentation? Prioritization? Sorting and aggregating similar

- ☐ Class Size?
- ☐ How much pre-work?
- What method of analysis: Discussion, debate, role play, a Board plan? Why?



- What level of student expertise is it designed for?
 - □ Level 1 (simple): state the protagonist's solution to a problem and ask students to analyze whether it is effective. These don't require any research and are easily researchable (avoid)
 - □ Level 2 (medium): present the problem facing the decision maker and have students come up with solutions. This is better from learning point of view.
 - □ Level 3 (difficult): describe the situation that the decision maker is in and have students figure out where the problem lies and provide solutions. Much more challenging, need to take the students through the case research methodology method (about 1 hour to teach)

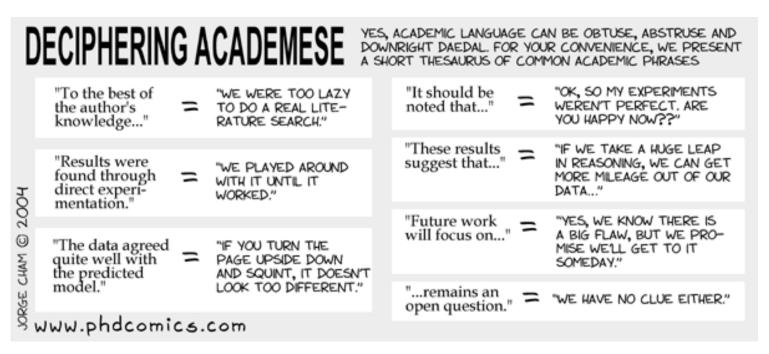


 What is the relevance level to the class (context...context)?

- ☐ Can they relate to the context
- ☐ Is it observable?
- ☐ Is it researchable (not solution, but context)
- ☐ Can you publish without repercussion? What are other issues that may come out in class discussions and how will you handle them?



- Language and Writing Style
 - □ A short case 3 pages, long-case 30 pages (not easy to do in e.g. UAE takes 4-5 weeks to get there)
 - ☐ Readability keep in mind your audience!!!



© Dr. Melodena Stephens Balakrishnan (2014) Teaching Case Study Writing Workshop



Evaluation

- ☐ How will you evaluate students?
- ☐ How will you record their individual contributions and evaluations?
- □ Remember the more older/advanced level they study, the more upset they get if they cant understand how you grade them!



What is your teaching plan (script)

- ☐ What is the opening discussion platform?
- ☐ How and when do you lead the students?
- ☐ Do you have a Board plan to joint down points?
- ☐ What time id required for facilitation?

Steps to Writing a Case II: Case Permission



Case Organization

- □ Do you have prior knowledge of the case outline you'd like to document?
- □ Do you have contacts?
- ☐ If not can you disguise suitably?



- ✓ You can write a disguised case study or a real case study
- ✓ Students are very excited when they find out the case
 is about real people (they google the names).
- ✓ You raise your credibility when it is about real people
 and problems
- ✓ The more visible the company, the greater your reputation and your institutions reputation



Steps

 Get a contact address and send an email with your case outline, expectations, case release form and let them know you will record the interviews and you will not publish and quote without their permission!!!



Be ready for legal compliance!

- ☐ Revision, Revision, Revision.....(from company and from publisher)!!!!!!!
- ☐ Suggest avoid copyrighted research material unless you have to!!!

Steps to Writing a Case III. Decision Maker (protogonist)



Who Am I

What is my name and title? Where am I based?

What is my measureable objective that I am trying to take a decision on? Why?

Are there any market constraints that I am under pressure from (global, industry stakeholders (competitors, distributors, suppliers etc), customers, press/media)? What is my role in the organizational and responsibilities?



Whom do I report to and who reports to me?

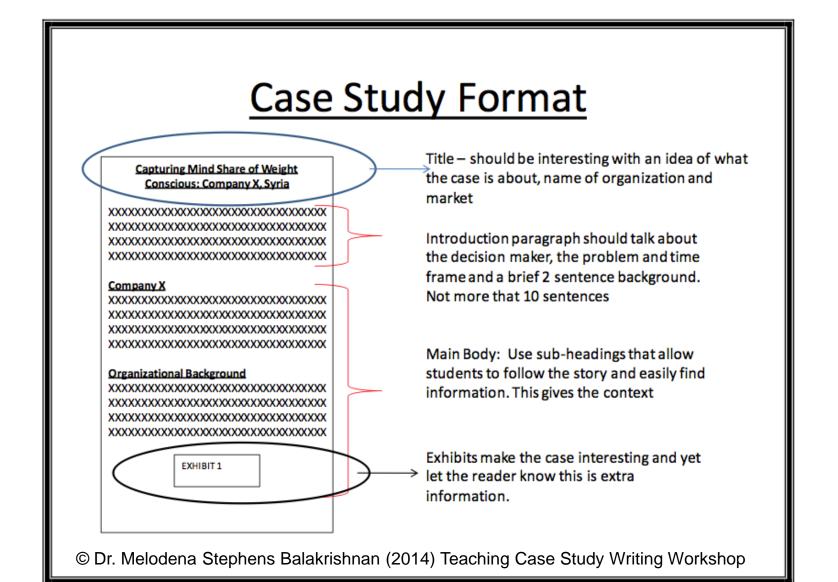
Are there any organizational constraints that I am under pressure from (deadline dates; past performance, team dynamics)?



- A good case study has multiple perspectives
- This limits bias, gives students a real feel of decision making and tacit and explicit information.
- A good case gives a time frame in which to execute decisions..



IV. Case Study Format



...not research facts. Emotions are important.

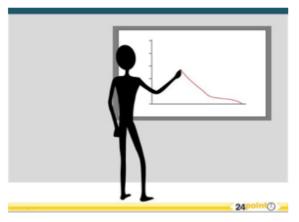
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Building up the Context

Describe the industry of operation and especially highlight the unique quirks or issues that make the market challenging

Describe your focus product and help the student understand its potential and its realistic performance in the market place vis a vis competitors. How is this product objective fit within the organization objective Describe the country of origin and focal market of operation



Describe the organization, its history, its vision, is structure (large, small, diversified, SME, adaptable?) and its culture.

What is the time-line for the objective? Why the urgency? What could be the possible consequences for not achieving your objective?

Dr. Melodena Stephens



VI. Test your case

□ Let someone else see it –and ask for their comments, advice and honest criticism.
 □ If you are putting currency details – do you want to write the exchange rate?
 □ We are always too close to our own work to see its failings
 □ Always proof-check thoroughly – no incorrect spellings, no incomplete references. Spell checkers are not fool-proof
 □ Revise teaching notes
 □ Test in class and get student feedback



VII. Send to case company for sign-off





- The teaching note need not be submitted for permission).
- In case they don't sign off...you might have to revise, and revise..and revise..
- Then you may have to modify teaching notes based on the case
- If you don't get the sign off you have two choices (1) wait (2) disguise the case
- Once done you can submit



Part III: Challenges to writing cases

Getting permission to document, approach the company

Access to relevant information

Permission to publish

Remember a teaching case is not case study methodology – there need not be a contribution to theory!!!!!



Part IV: Publishing

- Choose a publisher
- Rewrite according to the format
- Check the checklist
- Submit And patiently wait

What makes a good case?



□ Originality – what's new about subject, treatment or results?
 □ Relevance to and extension of existing knowledge
 □ Is your title gripping enough to increase downloads?
 □ Is your first paragraph interesting?
 □ How does it relate to your personal objective?
 □ Clarity, structure and quality of writing – does it communicate well?
 □ Will it stand the test of time?
 □ Global focus? How large is your target audience?
 □ Adherence to the editorial scope and objectives of the journal

Review Process!!!

ADDRESSING REVIEWER COMMENTS

BAD REVIEWS ON YOUR PAPER? FOLLOW THESE GUIDE-LINES AND YOU MAY YET GET IT PAST THE EDITOR:

Reviewer comment:

"The method/device/paradigm the authors propose is clearly wrong."

How NOT to respond:

X "Yes, we know. We thought we could still get a paper out of it. Sorry."

Correct response:

"The reviewer raises an interesting concern. However, as the focus of this work is exploratory and not performance-based, validation was not found to be of critical importance to the contribution of the paper."

Reviewer comment:

"The authors fail to reference the work of Smith et al., who solved the same problem 20 years ago."

How NOT to respond:

"Huh. We didn't think anybody had read that. Actually, their solution is better than ours."

Correct response:

✓"The reviewer raises an interesting concern. However, our work is based on completely different first principles (we use different variable names), and has a much more attractive graphical user interface.

Reviewer comment:

"This paper is poorly written and scientifically unsound. I do not recommend it for publication."

How NOT to respond:

X"You #&@*% reviewer! I know who you are! I'm gonna get you when it's my turn to review!"

Correct response:

√ "The reviewer raises an interesting concern. However, we feel the reviewer did not fully comprehend the scope of the work, and misjudged the results based on incorrect assumptions.

XXXXE CHAM @ 2005 www.phdcomics.com



Part V. How to promote your work

- Why? Influence policy = credibility; Raise profile of institution and discipline area; Attract collaborators and funding; New areas and opportunities for you (consulting, media)
- How? Use your network, press releases, associations/societies, engage, hone your media skills, 'brand image'



Resources

- Emerald Emerging Market Case Studies Author Resources – video and written guides
- James A. Erskine; Michiel R. Leenders; Louise A.
 Mauffette-Leenders, Learning with Cases, 4th
 Edition (Book) & Teaching with Cases, 3rd Edition
- Louise A. Mauffette-Leenders, Michiel R. Leenders, James A. Erskine Writing Cases, 4th Edition

What makes a good teaching/ learning case?



- 1. Should be a case not a story
- 2. Should tackle a relevant and important issue
- Voyage of discovery
- 4. Controversy (consider wisely ©)
- Contrast and compare
- Currently useful generalizations
- Data to tackle not solve the problem
- Personal touch
- Well structured and easy to read
- 10. Pertinent topic

Reference: "What makes a good case" by Prof. Derek Abell, Professor Emeritus, ESMT

Common mistakes – writing cases



- Written as a research article not a case
- "Taking sides"
- Including analysis and lessons learned
- Not following instructions author guidelines. e.g. http://www.emeraldinsight.com/products/new/pdf/author_guidelines.pdf
- Lack of fit ('why was it sent to this collection'?).
- Case does not adequately suit the teaching/learning objectives it sets out to achieve.
- Lack of permission documentation from organisation.

What makes a good teaching note



- 1. Case synopsis
- 2. Target audience
- 3. Clear learning objectives
- 4. Suggested session time, broken down by topics
- 5. Suggested student/ learner assignment
- 6. Brief description of the opening 10-15 minutes
- 7. Challenging case discussion questions with sample answers
- 8. Brief description of the closing 10-15 minutes
- If applicable, an update of "what actually happened"
- Supporting material worksheets, links to videos, readings, reference material, etc.

Plagiarism and referencing



- Plagiarism is hard to detect with peer review but there are new tools to help us
- Emerald's entire portfolio is included in iThenticate web-based software from iParadigms http://www.ithenticate.com/
- Emerald's Plagiarism Policy can be seen at <u>http://info.emeraldinsight.com/about/policies/plagiarism.htm</u>
- For more general information visit <u>http://www.plagiarism.org/</u>



Copyright



As the author, you need to ensure that you get permission to use content you have not created as soon as your manuscript has been accepted otherwise this may delay your paper being published



- Supply written confirmation from the copyright holder when submitting your manuscript
- If permission cannot be cleared, we cannot republish that specific content
- More information including a permissions checklist and a permissions request form is available at:
- http://www.emeraldinsight.com/authors/writing/best_practice_guide.htm
- http://www.emeraldinsight.com/authors/writing/originality.htm



Consent to Publish Release Form

- It is important that the organisation you have written about is happy for the case to be published.
- Form will be sent, completed and signed by representative from firm.
- Without the form, you will need to disguise the case.



Publish Release Form

Case Company:
Case Study/Article Title:
Re: Release for Publication
Date:
This is to confirm that I on behalf of the
I hereby authorize the use of this material written by (author) by giving full permission for the case/article, and the pictures and Exhibits in the case study whose copyright I own and necessary permissions received, to and her associations with MBRSG, AIBMENA and Emerald Group Publishing.
I provide my full permission for the case/article to be published in its entirety for the life of the work in all languages and all formats for use in teaching material in the Universities of its association, other Schools and Educational Organizations with which the Association or University operates a case exchange program, or for other organizations requesting this material for use in educational or training programs. In addition to the above, permission has been given for publishing the case in printed and electronic form for education or research. I have signed below to show approval for release in format given.
By signing this form, I warrant that I am authorized to grant full permission on behalf of the case/article.
Name of signatory:
Position:
Organization:
Address
Email
Signature:
Date of review

How to increase electronic dissemination



- Use a short descriptive title containing main keyword – don't mislead
- Write a clear and descriptive abstract containing the main keywords and following any instructions as to content and length
- Provide relevant and known keywords not obscure new jargon
- Make your references complete and correct vital for reference linking and citation indices
- All of this will make your case more discoverable which means more dissemination



Case Study Structured Abstracts



- Subject area of the case
- Student level and proposed courses the case can be used on
- Brief overview of the case
 What are the main points of the case? What is the argument you are trying to make?
- Expected learning outcomes
 What should readers of this case get out of it?
- List of supplementary materials
 Standard message: 'Teaching Notes are available to Faculty. Please consult your librarian.'

http://www.emeraldinsight.com/authors/guides/write/abstracts.htm#5

Example of a good abstract



- Title Financial closure of Bengaluru International Airport Limited.
- Subject area Infrastructure finance.
- Study level/applicability II MBA/Executive MBA (Project Finance, Infrastructure Finance).
- Case overview It is generally believed that the Indian economy is on the threshold of achieving significant growth in the coming years. The availability of adequate infrastructure facilities will play a key role in realizing this growth potential. To accelerate the process of creating infrastructure capacity, the Government ofIndia has opened up many infrastructure sectors for private sector investment. Creation of international standard airport facilities is an important component of such new infrastructure creation.



Example of a good abstract

- ... This case study presents the initial development and financing closure of Bengaluru International Airport Limited (BIAL), the first major private sector airport in India. In retrospect, it is generally felt that BIAL was an important milestone in the privatization of airports in India. The blueprint for the greenfield PPP airport in Hyderabad was closely modelled on the BIAL project. The experience gained in the development of BIAL also played a major role in subsequent brownfield PPP airport expansion projects in Mumbai and Delhi.
- Expected learning outcomes The goal of this case study is to illustrate the complexities that exist in the process of infrastructure development and financing including:
 - The importance of using an appropriate project structure.
 - The prevalence of early returns to project sponsors as compared to lenders.
 - The process of achieving financial closure.

Before you submit your case: check for errors



- Let someone else see it show a draft to friends or colleagues and ask for their comments, advice and honest criticism
- We are always too close to our own work to see its failings
- Always proof-check thoroughly no incorrect spellings, no incomplete references. Spell checkers are not fool-proof



Spot the error:

"A knew research methodology introduced in 2007..."

Before you submit your case: check it works



Ask a trainer to test it.

 If they can use it with no further support or supplementary material then it works!

Call for Proposals For Case Study Book



- Deadline May 31st 2019
- Proposal (1-2 pages)
 - Title (include name of organization)
 - SDG of focus
 - Who is the decision maker?
 - What is the decision problem?
 - For teaching note, what is the theory?
 - Will you be able to get a case release?
 - Why is the teaching case interesting to educators, practitioners?
 - Should be factual case

NOTE: Final manuscript should be no more than 10 pages

Submission to initial feedback to authors



- Book Editorial Team: Initial checks of manuscript and permissions.
- The book editors identify and contact reviewers.
- The book editors assess the reviewers' comments and recommendations and recommend a decision.
- The editor-in-chief makes the final decision.





Possible editor decisions

You will be advised of one of four possible decisions:

- Accept
- Minor revision
- Major revision
- Reject

Request for revision



A request for revision is good news! It really is

- You are now in the publishing cycle. Nearly every published case is revised at least once
- Don't panic!
- Even if the comments are sharp or discouraging, they aren't personal



How to revise your case



- □ Acknowledge the editor and set a revision deadline
- If you disagree, explain why to the editor
- Clarify understanding if in doubt 'This is what I understand the comments to mean...'
- Consult with colleagues or co-authors and tend to the points as requested
- Meet the revision deadline
- Attach a covering letter which identifies, point by point, how revision requests have been met (or if not, why not)
- For example "The change will not improve the case because..."



What if your case is rejected?

- Don't give up!
 Everybody has been rejected at least once
- Ask why, and listen carefully!
 Most editors will give detailed comments about a rejected case.
 Take a deep breath, and listen to what is being said
- Try again!
 Try to improve the case and re-submit. Do your homework and target your case as closely as possible.
- Keep trying!



Positive outcomes of rejection

- Incentive to improve your work
- Valuable feedback

Good experience of how the system works





Congratulations!!

Following a lot of hard work and at least one revision your case has been accepted.

"In all the years I have been an editor I have not accepted a single case study on first submission."

Typical editor comment

How to promote your work





Why?

- Support educators/ trainers globally
- Raise your profile
- Attract collaborators and funding
- New opportunities e.g. in consulting, the media

How?

- Use your network e.g. through listservs, press releases or simply link to the case in your email signature
- Contact the authors in your reference list
- Hone your media skills and 'brand image'
- Ask the publisher to provide you with leaflets

Additional opportunities



Other important publishing work that you might wish to get involved in includes:

- Reviewing
- Journal articles
- Book authorship
- Editorial advisory board membership
- Contributing editorship
- Regional editorship
- Editorship
- Partnering organization

For details of opportunities in this area please do in touch with us!



Main points



- Have a clear idea of objectives from the start.
- Develop a productive relationship with organisation.
- Follow author guidelines.
- Use your network, publisher, editor for advice and feedback.



Registration



 In order to get the electronic certificate, we ask the participants to register at the session/workshops via:

https://dsgir.eu.qualtrics.com/jfe/form/SV_b1q22o5eSpp6lhT



THANK YOU

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