# PARTICIPATING *in a Case Study*

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## WHAT IS A CASE?

A case is a description of a management situation. Most cases range in length from two to 25 pages of text and exhibits; the latter often present quantitative material. So-called field cases are largely based on interviews with members of the organization that is the focus of the case and the information they provide, supplemented by published sources. Library cases are drawn from published material in the public domain and involve no interviews with the host organization. Some cases have a media component, such as a video, and others are entirely multimedia. A case is not written to illustrate the correct or incorrect handling of an administrative situation, nor is there an editorial bias that implies a particular conclusion. Under no circumstance should a case be seen as an endorsement or promotional vehicle.

A chronological series of cases based on a single organization is sometimes used to expose students to its cumulative experience with a situation.

## HOW ARE CASES USED?

Cases are used for class discussion in a variety of educational programs. At Harvard Business School (HBS), these include short and comprehensive programs for executives as well as the two-year program leading to a Master of Business Administration (MBA). Cases offer students experience in dealing with complex, realistic situations, with emphasis on decision-making. In most courses, cases are arranged so that a conceptual structure is built up during the course. Cases are sometimes supplemented with readings and short lectures.

In the MBA program, a student most often has three cases to prepare every day, each for a different course. Usually, one case is discussed per class session.

Most cases developed by HBS faculty are available to other institutions and individuals through Harvard Business Publishing.

## HOW ARE CASES DEVELOPED?

Each faculty member responsible for a course typically has a group of issues or situations for which cases are needed. Cases are often developed in response to these explicit needs. At other times, organizations suggest particularly interesting situations to the faculty members.

## WHO WRITES THE CASES?

HBS faculty members lead the case development effort. They may be supplemented by coauthors, including faculty members at other academic institutions, research associates, and HBS students. All coauthors work under the close supervision of faculty members.

In general, extensive writing, editing, or revising by the host organization does not aid case development. These responsibilities are most satisfactorily performed by people outside the firm.

## WHO PAYS THE EXPENSES?

HBS commonly pays for the direct expenses of case development. There are instances when certain case writing ventures are underwritten by an association or an individual firm. Such exceptions are rare, and are noted in the footer of the case.

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## WHAT IS EXPECTED OF THE HOST ORGANIZATION?

A field case cannot be used until it is formally approved by the host organization. An initial discussion between the faculty supervisor and the host organization establishes the preliminary scope of the case. This understanding often is confirmed in a written summary or outline. An agreement to continue with the project signifies the organization's willingness to provide information relevant to the situation and that is important to the decision-makers. Such information is crucial to the development of an effective teaching vehicle.

The initial agreement also affirms the organization's general willingness to approve a case of the nature and scope discussed for Harvard's use. If there is real doubt about the likelihood of approval, it might be better to halt the venture rather than to risk developing an unapproved case and the consequent loss of substantial time and money.

## HOW MUCH EFFORT DOES THE HOST FIRM OR ORGANIZATION INVEST?

It usually takes at least two days on-site to gather the data for a field case, with some follow-up interviews possible. During that time, the case writer talks about the situation with all appropriate members of the organization and, on occasion, with informed outside sources, such as an advertising agency or a trade association. Some cases, of course, will require more or less of the organization's time.

The case writer's job is facilitated by the use of company memos and reports, and industry studies or articles. Information of this nature typically improves the case substantially because the data are already presented clearly and concisely. In most instances, the case writer will need access to cost, investment, and profit data generally considered proprietary.

## HOW IS CONFIDENTIALITY MAINTAINED?

Before a field case can be used, it must be formally approved in writing by a responsible executive of the host organization. Prior to approval, the case and the information upon which it is based are treated with the utmost care and confidentiality. HBS faculty and staff take extremely seriously the School's reputation for this care and confidentiality. More than 60,000 cases have been developed with company trust and cooperation, and the School considers it essential that this record be maintained. Experienced case writers have developed the ability to perform this task well.

Sometimes a firm is hesitant to release specific data to the public. In such instances, the numbers can typically be changed so that they are still realistic and useful for discussion and pedagogy, but pose no threat to the firm.

In some situations, the organization desires to disguise itself. This, too, is possible in many instances. However, a firm that is unique because of its size, market position, or situation cannot be disguised without destroying the integrity of the scenario. The case becomes so artificial that the student's ability to play the role of manager is restricted. Thus, it is important to define the nature of material to be disguised at the beginning of the case writing process. The company often also loses some benefits of case development when the case is disguised.

## WHAT ARE THE BENEFITS TO THE HOST ORGANIZATION?

There are four major benefits for the host firm or organization. Most important and elusive is making a substantial contribution to management education. HBS and its peer organizations throughout the world depend on up-to-date and realistic cases for effective management development and education. All organizations and companies benefit from progress in managerial education and practice.

Second, the organization develops a relationship with HBS, its faculty, and its student body.

Third is the use of case material for in-house training programs. Material on an organization's own situation is sometimes more useful in its leadership development programs than is other, less focused material.

Finally, some firms have gained an added perspective by seeing a case written by an outsider that explicitly describes their own situations. While there are many instances where this does not happen, an unbiased review is often of more than passing value.

For nearly 90 years, thousands of organizations have collaborated with HBS on case development. These organizations generally have found the collaboration worthwhile—involving little or no direct cost while affording absolute control of sensitive material and resulting in a positive contribution to management education.

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