Teaching Notes:
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Case Study teaching is the blood which carries oxygen of knowledge to the vital organs of Management education. The academia produce cases for teaching management which are narratives of the activities in Industries and Industries in turns import the improved management practices to be tested in the realm of happening. In short teaching case is to cultivate is activity in the presence of knowledge while learning through case method is creating an activity in presence of knowledge.

Though Case writing is like any other form of writing and it covers a whole spectrum from beginner to professional. The majority of cases are developed by people in the spectrum near to professionals. A good news is that everyone can write a case, can master the art of writing and creating a case out of the diverse episodes, an occurrence of significant importance with lot of learning to incumbents.

What is a "Case Study?"

A case study (or case story) may be understood best as a narrative, based on actual events, that creates an opportunity for conversation, problem analysis, and virtual decision-making. An effective case study transfers specific knowledge by placing the student or workshop participant in a position to think through choices faced by decision-makers in real-life situations. By confronting actual scenarios, participants develop and refine analytical skills for solving similar problems in their own projects.

The rationale for the case method is that organizational learning is most effective when knowledge is shared in usable ways among organization members, and that knowledge is most usable when it is contextual—when it relates to one's own experience. Inert information databases, as in a lessons-learned system, may be part of a knowledge-management process, but by themselves, they are insufficient. To create dynamic organizational learning, the context of the stories must be brought into the KM system. The case study is the main vehicle to do this.

Decision-oriented case studies are structured and written from the viewpoint of a key player, the protagonist. They are framed around information available to the protagonist at the time of the event. The case typically builds to a point where the decision-maker is confronted with open-ended choices. The reader is left to analyze the information and scenarios and then make critical decisions based on contextual analysis.

A typical Business case study is a way to disseminate the experience and wisdom embedded in the stories of success, failures and achievements of managers and project team members. A documented case story engages participants intellectually and emotionally through their involvement in virtual decision-making, sharpening their analytical, problem-solving, and management skills by sparking insight and creating connections between events, incidents, or systems.

An effective case study...

- Leaves important issues unresolved;
- Allows for multiple levels of analysis;
- Captures a tension between courses of action;
- Generates more questions than answers;
- Fosters decision-making thinking.

Creating the Case Study: From Cradle to Grave

The creation, development, and implementation of case studies, is process-driven, and the process must be managed systematically. Likewise, it must be deadline driven— recognizing that some flexibility should be built into the process, since, as in any project, exigencies may warp the schedule. A case story incorporates many elements—human and technical aspects—as well as lessons learned. Good case writing takes time and efforts (of course money); one should expect to make the proper investment to create quality cases.

A 10 Step case-development approach is synthesised from diverse sources including various writing and excerpt of experts and personal experience of writer during the sessions.

"Forward thinking is sometime starts with backward glance. Much of the research have directed at developing new theory rather than leveraging the day to day learning"

A 10-Step Approach to Case Writing

Before setting off on the case-writing course, keep in mind a few objectives that should guide the development of a case study throughout the process. The case writer and facilitator seek to deliver lessons from an experience—successes as well as failures. Build the case around a relationship with stakeholders; create a learning opportunity for discussion and debate that sharpens thinking by presenting at least one key decision-making opportunity to facilitate discussion, give the case the force of veracity and to provide critical insights.

Step One: Pick a Target

When seeking a subject for a case, usually look for three, nevertheless any one is suffice.

a. A topic that needs to be addressed.
b. An experience that has presented itself.
c. A key player in a project or episode who is willing to tell his or her story.

Subjects that make for compelling cases include...

(a) Well-known task or project failures or successes;
(b) Close calls, incidents, and ―lucky outcomes;
(c) You make the call events that engage decision-making skills;
(d) Lessons learned: technical and/or project lessons;
(e) Design decisions and consequences (what worked or didn't work);
(f) Safety reminders and ―safe stories;
(g) Personal insights: leadership and/or management of current tough decisions.

Step Two: Define the Parameters of the Case

The success of the story depends on staying focused on the learning objectives by ―bounding the Case, or defining the parameters of the story. The most important guideline for this early step is to identify the learning objectives of the case study. The writer must have a definite teaching purpose in mind. The purpose may change over time as the case unfolds (new learning opportunities often emerge that trump the original intent) but the writer should be careful to negotiate any change in focus with the key case stakeholders. Remember: ―It's their story to tell. Set the boundaries for the story by identifying...

(a) Events to be included (and what not to include)
(b) Persons to be included (whose story is it?)
(c) Teaching points to be emphasized—as determined by the ―So what? factor.

Step Three: Do the Homework: Background Research

Research is essential to the success of any case study. Before talking to the principals involved, gather as much background information on the project as possible. Access public information and collect data from historical and/or current project materials, briefings, and documents, and reports. Identify the primary sources of information; these are the decision - makers. Gather background material on the project principals through published accounts, such as news stories, official Web sites, and other certifiably valid information on the Internet.

Step Four: Interview Key Players to Get Their Story

This is perhaps the most important step in the case-creation process: interviewing the primary sources. Without direct, open participation by protagonists in constructing the narrative, not only will critical perspectives and information be missing, the story will lack the colour and depth only firsthand accounts and quotes can provide. In addition, more than one side of the story (from primary sources) should be collected.

Conduct interviews with any (and possibly all) of the following:

(a) Program and/or project manager;
(b) Chief investigator;
(c) Contractors;
(d) Chief/project engineer, other personnel from the project lead/monitoring group;
(e) Team members or personnel from other stations or project who has got similar experience
(f) Academic and other partners.

Trust is the key to success in one's relationship with primary sources. In arranging an interview, relate your experience and connection with the case project. Provide contacts and references if necessary. Describe the case method and its purpose in your Organisation, and give examples of cases and how they have been applied successfully, if any.

In the interview, in addition to the specific questions you will have prepared based on background research, ask a few broad questions to get a larger context and feel for the story. For example:

a. ―Why did you decide to take the action you did?
b. ―How do you feel about the outcome of the mission?
c. ―What were the sources of the disagreements or setbacks (or successes)?

Step Five: Evaluate Story Lines for Learning Points

At this point in the process, a reality check is in order. Depending on the outcome of the research, in general, and the interviews, in particular, the case writer should now be better able to assess (or may need to reassess) what points can be illustrated by the case, and what story lines can be pursued. Now is a good time to clear those ideas with the parent organisation. This will make it easier to zero in on what story people are willing to tell and how they will present it, with implications for the final case study and its likely use. Bear in mind more than one case study may eventually be extracted from the stories you collect.

Step Six: Draft the Case into a Narrative

Writing the first draft of the case requires assembling the material—research and interviews—into a narrative, complete with characters, plot, beginning, middle, and end. A couple of simple guidelines should be in the back of the writer's mind, from the first sentence to the final decision question, while crafting the story.

There are two principles for drafting a good case study:

a. Get the story right. This is critical for believability and buy-in.
b. Make the story compelling. This is essential for drawing in participants and keeping them engaged.

Beginning the Story: Setting the Context

The initial step in drafting the case is to do a ―brain dump. Combine your research and interview information. This should include any diagrams, charts, and photos you may have gathered. As you begin to fashion a cohesive story, remember that you can count on doing several revisions, beginning with a couple of drafts before the final case and then more revisions likely after the case study has been tested with an audience.

The case study typically begins with a scenario that frames the issue (or issues) facing the decision maker as described from his or her point of view. This introduces the topic and the protagonist(s), as well as the central issues of the case, typically in less than a page.

Middle: Fleshing Out the Story

With the contemporary scenario in place, framing the issues and foreshadowing the decisions ahead, the case writer now tells the ―back-story and builds a narrative that ultimately will return to the time and place at which the case began. Chronologically, the history of the problem is described first, in a project or mission background section. In addition to technical and task/project-specific data and historical facts, here is the place for a generous supply of quotations from key players interviewed in the research phase. These should be quotes from any primary sources (meaning first-hand or direct accounts), most importantly (but not only) the key player(s).

In sum, more data pertaining to the problem as it exists is provided—but this middle part of the story is not simply a section for providing critical information and data. Here the tension of the story is created that drives the story and eventually leads to decision points.

Ending the story: Back to the Beginning

Following the background and detailed discussion of issues, the case returns to the problem depicted in the opening scenario. By this point, the reader should be prepared to analyze the problems—and be ready to make decisions. He or she now has in hand the project and mission history, critical facts about the situation, perspectives on the problem from different people involved in the event, as well as some information that may be ambiguous or appear to be in conflict.

The case has now fully immersed the reader in the story. The reader should now be able to conduct an analysis for the discussion or decision-making part of the case. This final section, then, presents a recap of the situation and a recreation of the decision scenario that was established at the beginning of the story. This is followed by a set of questions requiring participants to make decision choices and to consider the potential outcomes of implementation of their decisions.

Finalizing the Draft

Once the draft is in a complete narrative form, copy-editing should be done and any missing pieces, such as source attribution of images, should be added. The case should be formatted into desired layout and graph/chart/table titles should be checked for consistency. This cleanup and final editing is in preparation for circulating the draft for review by primary stakeholders. Also, organize and retain for your records all notes and materials you cut from the draft.

Writing and Style Points

Generally standard (following business-school convention) calls for case studies to be written in the past tense. This technique should be maintained consistently throughout the body of the case. Depending on the nature of the story and the decision-making context at the end, however, some cases may conclude with a ―Decision Time discussion section that places the reader or participant in a present-tense scenario (e.g., ―You are the Engineer in charge —what will you do?). A word regarding content: Once online, the case should refer to technical details (such as test results) and provide links to the relevant sources, so readers can get more background on issues that arise in the reading of the case.

Step Seven: Circulate the Draft

The draft is now ready for review by stakeholders in the project that is the focus of the case, as well as by those involved in the case-study process. The draft should be provided to anyone you may have agreed to allow review the case before publication, people you think could provide valuable criticism, and/or anyone whose signoff is required for case to be published. In this step, be realistic about the number of drafts that case writing demands. This is an iterative process that will most likely involve multiple revisions.

Step Eight: Test the Case with a Local Audience

Before a case study is put into practice, it should be tested with a low-risk audience. This may take place in training courses in-house, on team retreats, or in focus groups. These test runs provide important information, insight, and feedback for the final revision and tune-up prior to implementing the case as part of a course curriculum or workshop agenda. The case writer should be present to see how the case comes across. Cases have a way of coming across differently to various audiences, so it is essential to find that out while you can still modify the final version.

Step Nine: Create a Teaching Note and an Epilogue

Two accompanying pieces are integral to a complete case-study package: an epilogue of ―what happened, which provides closure to the story to date; and a teaching note. Epilogues are written with the information gathered during research, interview material not used in the case, and any relevant information that may have become available since the project concluded.

The teaching note is a guide for case instructors. It presents the views of the facilitator (and/or case protagonist) on how the case can be taught most successfully, sometimes step by step. The emphasis is on conveying the learning objectives of the case. Creating an optimally effective teaching note requires that the case writer observe the case being put into practice to see first-hand what works, to witness participants' responses, and so on. Feedback from participants may also be helpful in guiding the writing of teaching notes.

Step Ten: Validate, Publish, and Roll out the Case

The final step in the methodology is to put the case study into practice. Before it can be published and made publicly available for implementation, however, the case must be officially authorized. Validation involves, first, making sure all the individuals mentioned in the case study have had a chance to get their story heard. Keep in mind that the case is intended to help people learn. This requires that everyone in the story be included, to the extent possible, in the case-study events. All case studies carry an appropriate disclaimer at the bottom of the first page.

A case study focuses on a specific aspect, event, or time horizon in the life of a project.
Cases do not cover the whole mission, but only tell a certain story. Each story has one or more learning objectives that can be used in a discussion, presentation, or self-reflection.
The case length may vary from few pages to entire booklet some indicative lengths are mentioned below with the case type.

Technical 1–3 pages, Lessons Learned 1-4 pages, Teaching 4–8 pages, Academic 10–30 pages, and Extended30-100 pages.

"Each case is a kaleidoscope: what you see in it depends on how you shake it"