What We Have Learned Along the Way: Case Research, Writing, and Publishing in the Journal of Case Studies

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Since 2012, Cellucci and Peters have served as editors for Journal of Case Studies [(JCS) formerly known as Annual Advances in Business Cases], and Cellucci had served as an associate editor for the Annual Advances in Business Cases from 2009-2012. Jenyqua Young currently serves as the student assistant for the journal. Throughout our time with JCS, we found we have learned a lot along the way and thought stakeholders might be interested in reading about some of this knowledge as it pertains to case research, writing, and publishing. Throughout this article, we reference cases published from 2012 to our current issue when they exemplify a point made. We hope you will find valuable points to assist you in your case research along the way as well.

Case Research

Cases are Real and True

The purpose of the Journal of Case Studies is to provide a “continual flow of effective up-to-date cases to promote excellence in case teaching” (Journal mission, n.d.). Cases published from 2012-2017 represent different industries with varying situations in which managers must address issues and problems effectively. For example, cases in this issue range from examining the management of an auto parts chain, Auto Expert (Hayes, Lion, Krumwiede, & Bolinger 2017), to uncovering the marketing practices of a casket company, St. Joseph Abbey’s Caskets (Totten, Irtisam, & Yeargain, 2017). The caveat of JCS requirements, however, is that all of the cases must be real. As William Stratton, Past President of the Society for Case Research (2002) put it, a case is “an authentic description of a real situation” (Berger, Stratton, Thomas & Cooke, 2011, 8).

Research Methodologies

Permissions secured. Case researchers have interviewed managers in organizations to learn the story of what happened, when it happened, why it happened, and what was done to address the issues/problems that caused the situation or resulted from the situation. These interviews have yielded rich stories for the reader to consider herself in the role of the protagonist. For example, Jaffke (2012) interviewed business partners as they strategized entrepreneurial expansion for their coffee shop. Readers were asked to explore customer service initiatives that include marketing strategies to fit their customers’ needs.
In this issue, Jin and Osland (2017) have permission to publish as the owner of the business was also an author. For this case on the Artism Creativity Center, students are put in the role of the decision maker for a non-profit organization and have to address issues related to succession planning, board creation, and fundraising. Mankin, Rivas, and Jewell’s (2017) case on the entrepreneurial aspects of being a driver for a ride sharing company, like Uber or Lyft, is also based on primary data. These authors interviewed an actual ride share driver and obtained his permission to publish the story. For this case, students evaluate the strengths and weaknesses of working as a ride share driver, based on the information provided in the case.

Researchers who have pursued this method also gained permissions from all persons interviewed. As editors, we know that our role is one of responsibility for the journal stakeholders, which include (Cellucci & Peters, 2013, 1):

- the authors who submit their case for publication consideration;
- the reviewers who take the time and make the effort to evaluate the authors’ efforts;
- the students who study the published work;
- the organizations, persons, and places that served as the focus of the case study; and
- the Society for Case Research (SCR) members who have placed their trust in our ability.

To this end, interviewees have signed that they had agreed to be interviewed and had authorized the case to be published. An important point to note regarding permissions is that researchers have secured the interviewees’ permission as early in their research as possible to ensure their work in the field will not be for naught.

**Secondary sources.** Also, case researchers have relied upon secondary sources to learn more about a real-life situation that spurs the reader to think critically about a situation. To illustrate, Green and Thomas (2013) presented a case about a person’s rational decision-making process regarding a potential donation to the Humane Society. To add information needed in the decision-making process, they relied upon secondary sources that explained how the Humane Society had distributed donations among salaries and benefits, marketing and fundraising, and direct services for animals.

In this issue, Winget, Lamb, and Wheatley’s (2017) case on the investment practices of Root Capital was based off secondary sources as can be seen by the long list of references available at the end of the case. This case is particularly interesting because it illustrates how corporate social responsibility combines with the goals of a business to increase profitability.
Ideas for Cases

Throughout our time as editors, we have received several questions regarding the research process. Our top three questions have been:

1. Do I still need permission if I have disguised the name of a firm and the interviewees’ identities? Yes, all cases that involve field research require permissions to publish. Without the permission, JCS will not publish the case.

2. Will my university’s Institutional Review Board approval serve as evidence regarding field research protocol? Yes, an institution’s IRB denotes that the research process has been vetted and approved through an ethical and responsible process. We encourage case researchers to submit their research plan to their respective IRBs.

3. Where do case researchers get their ideas? Ideas are everywhere. See Figure 1.

To elaborate the answer for question 3, Peters, Cellucci & Davis (2013) developed a model for the development of case ideas (4-5):

**Figure 1: Inside-Out Model for Case Development**

<table>
<thead>
<tr>
<th>Internal Sources</th>
<th>External Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students (both graduate and undergraduate)</td>
<td>Popular press stories</td>
</tr>
<tr>
<td>Relationships with alumni</td>
<td>Cold call local businesses</td>
</tr>
<tr>
<td>Issues within the university</td>
<td>Visiting executives to the college</td>
</tr>
<tr>
<td>Consulting projects</td>
<td>Board memberships</td>
</tr>
<tr>
<td>Guest speakers you have in your class</td>
<td>Chamber of Commerce</td>
</tr>
<tr>
<td>Family, friends, neighbors</td>
<td>Other professional organizations</td>
</tr>
<tr>
<td>Class projects (with clients, non-profits, etc.)</td>
<td>Small Business Development Center</td>
</tr>
<tr>
<td>Advisory boards</td>
<td></td>
</tr>
</tbody>
</table>

Peters et al. (2013, 4-5)

Gaharan and Foust (2013) developed their case on AT&T’s customer service issues from both internal and external sources. They told a personal story (internal source) and included AT&T public documents (external source) to describe the story of one person’s attempts to communicate effectively with a large company.

In this issue, Jones, Bechtold, and Hayman’s (2017) case on HBO was a result of a class project. Jones gives her graduate students an option to write cases (i.e., secondary research) or solve a problem at work (i.e., primary research) for the project in the capstone course of the Masters of Arts in Leadership and Management program at her university. Hayman, a student in
the class, was a fan of HBO’s services and decided to pursue that company for the class project because of her interest in the brand. Both Jones and Hayman found working on a case in this capacity very motivating (E. Jones, personal communication, November 28, 2017).

Case Writing

What we have learned about case writing during our tenure as editors is the outcome of three experiences: our conversation and written communication with case authors; our conducting case writing workshops at Society for Case Research meetings; and our experience of reading every case submitted for publication review. One key take-away we have shared and have watched numerous cases researchers benefit from is the following advice:

Be willing to serve as case reviewers. The best way to become a better writer is to read critically the work of a peer.

Case Researchers as Reviewers

At the annual SCR Summer Workshop, case writers have the opportunity to have their cases reviewed as well as serve as reviewers for other submitted cases. Every case accepted for the summer workshop is reviewed by peers as the workshop theme is outcome based—better cases make for better case teaching—the stated purpose of the journal.

SCR’s case writing summer workshops have been held at various university campuses for over 25 years. Following the workshop, many case researchers hone their cases and then submit the case for publication consideration in one of SCR’s journals (Business Case Journal, Journal of Case Studies, and Journal of Critical Incidents). The evaluations of the experience by editors have indicated that the workshops have helped the case researchers become better case writers.

The process for the summer workshop is as follows (Summer workshop, n.d.):

- Cases are submitted for consideration to be accepted for the summer workshop during the spring term prior to the scheduled meeting.
- Accepted cases for the workshop are sent to reviewers about three weeks prior to the workshop. The reviewers are comprised of the other summer workshop attendees who usually have their own case under review as well.
- During the workshop session, a designated scribe takes notes of what the reviewers have discussed and, at the end of the session, the team recommends what authors should consider and what they must consider to perfect their case writing. Each session last over an hour,
and the case is discussed by peers with the emphasis placed on how to make the case better.

Thus, each submission is reviewed by a team of dedicated case researchers who offer advice, criticism, and ideas in a positive and more informal environment. New case researchers are encouraged to attend the summer workshop as they learn by doing. First, they learn how to serve as a case reviewer through their participation in the summer workshop. Second, they become better case writers as they learn from others’ criticism of cases presented.

Even with the benefits of summer workshop attendance, it is important to note that cases do not have to be presented at the SCR Summer Workshop to be considered for publication in JCS. Nonetheless, if a case researcher submits a case for review by the journal, he should be prepared to serve as a reviewer. Reviewers complete a reviewer form and return the completed form to the editors (Journal of case studies reviewer form, n.d.). Through this process, they will have identified and will have been prompted by the form’s questions to have considered thoughtfully key components of what makes a good case.

The Importance of the Hook

One of the most common critiques reviewers have made regarding a case concerns the hook. As defined, a hook provides “enough information about the individuals, organization, situation and issues that the reader is motivated to continue reading the case” (Naumes & Naumes, 2012, 129). Simply put, better case writing has included a hook that has presented information at the beginning of the case that has summarized the problems or issues and has perked the reader’s interest in learning more.

Peters, Cellucci, and Kerrigan (2012) elaborated upon ways to improve the hook that included case writers’ thinking about the hook as a lead in a newspaper article; considering the perspective of the student reader; and communicating clearly the case story, as well as explaining the significance of the issues or problems addressed in the story. If the case writers communicate why the case has pedagogical value to the reader, then a good hook is likely to emerge.

O’Connor, Phipps, and Blasdel (2016) employed a hook that shocked readers by its summary of a CEO’s violent outburst that was videotaped, released to the media, and subsequently spurred crisis management by the firm’s Board of Directors. The case presented a situation that asked students to decide how the firm should handle the negative publicity that was caused by the CEO’s actions and how to reprimand the CEO who had behaved inappropriately.
In this issue, Lakshminarayanan, Maggio, and Best’s (2017) case on Starbucks provides an interesting hook that draws in the reader. In their hook, the authors set up a dramatic scene in a coffee shop but then state that production problems were a small issue, when compared to the larger, strategic issues that the new, young CEO faced in growing the company internationally.

**Importance of Details**

Since 2012, the JCS has included several lead articles that specifically offer advice about how to improve case writing. While we encourage case researchers who want to improve upon their case writing skills to peruse the articles, we highlight a few that should be on the top of the reading list. Foust, Peters, Cellucci, and Ford (2014) delineated what makes a great case, including the need to maintain objectivity and not bias the reader. Borchers, Cellucci, Hodge, and Peters (2016) elaborated upon the essential elements of case writing and included a review of TOTAL CASE, a pneumonic created by Davis, Peters, and Cellucci (2014), so authors may be reminded of important details (See Figure 2).

**Figure 2: TOTAL CASE**

<table>
<thead>
<tr>
<th>T=Tense</th>
<th>Cases must be written in past tense.</th>
</tr>
</thead>
<tbody>
<tr>
<td>O=Objectivity</td>
<td>Authors should strive for objectivity.</td>
</tr>
<tr>
<td>T=Tone</td>
<td>Authors should strive for an unbiased, objective tone.</td>
</tr>
<tr>
<td>A=Authenticity</td>
<td>All cases must be real.</td>
</tr>
<tr>
<td>L=Length</td>
<td>Cases typically are between 7 to 15 pages in length.</td>
</tr>
<tr>
<td>C=Characters</td>
<td>Authors should introduce protagonist (the main characters) in the case hook.</td>
</tr>
<tr>
<td>A=All-in-order</td>
<td>Authors should try to maintain the chronological thread throughout the case.</td>
</tr>
<tr>
<td>S=Suspense</td>
<td>Authors should try to create the kind of suspense or interest that keeps the reader wanting to learn more about the situation.</td>
</tr>
<tr>
<td>E=Ending</td>
<td>Authors should develop a case ending that summarizes the problem or issues in the case while asking</td>
</tr>
</tbody>
</table>
in this issue, Jones, Hutchison, and Holmes’ (2017) two cases on Mantras Ambulance Services provide an “objective” point of view on the business valuation of the company because they present both sides of an issue. Their first case presents the business valuation from the seller’s perspective, and the second case highlights the valuation from the buyer’s side. Bumpus, Leslie, and Turner’s (2017) case on sharing a product idea illustrates “all in order” in that the story clearly follows a chronological thread. The chronological approach taken by these authors helps create interest in the case as it presents the experience of an inventor taking his product to market.

Case Publishing

Follow the Author Guidelines

Cases submitted to JCS for publication consideration are first reviewed by the editors to note if the topic fits the journal, if the case truly was a case (and not a class exercise, for example), and if the case followed the author guidelines (SCR manuscript guidelines for authors, n.d.). The most common reason for an editor’s decision not to send the case out for double blind peer review was that the authors did not follow the SCR guidelines. We have recommended that authors print out a copy of the guidelines and ask themselves if their case followed the printed copy. Example questions to ask include, “Was the case font Times New Roman 12?” “Were references in APA format?” “Were headers aligned properly?” “Was the case in past tense?” These are simple questions, but answering them and reviewing the case to ensure it followed SCR manuscript guidelines takes time. We encourage authors to take the time, because not doing so may cause a potentially excellent case not to be published in the journal.

Follow the Published Timelines

After cases have undergone the double-blind peer review process, and the recommendations were to revise and resubmit or recommend to publish, the editors will send the case back to the authors with a due date for the authors to return the case. The journal review and publication process follow a set timeline, which is published each year on the Society for Case Research’s website (Publication Process and Timeline, n.d.). To ensure timely publication of the two issues annually for JCS, authors should pay close attention to the due dates noted.

Follow the Reviewer Recommendations

When cases have received reviewer recommendations for revise and resubmit or accept for publication, the editors will send a decision letter to the corresponding author along
with the reviewer comments on the completed reviewer form. Also, the editors will have included bulleted points that require authors’ attention. For example, if the reviewer has mentioned that the hook should be reworked and noted that it is interesting, but needed to be shortened and simplified, and the editor has noted that in the decision letter, then the author should address that recommendation in her case revision.

Submit the Publishing Agreement and Field Research Permissions

Once the case has been accepted for publication, the completed publishing agreement must be submitted (Publishing Agreement, n.d.). Also, if the case methodology included an interview or communication with individuals associated with the case, the completed field research permissions must be submitted (Field Research, n.d.). The case will not be published in the journal without these completed forms.

Editorial Service and Future Directions

In summary, our service as editors has given us rich opportunities to learn about ways to improve case research, writing, and publishing, and we would like to encourage SCR and our membership to learn more about the process of publication. We have been privileged to read, critique, and work with authors as they develop their work, and the improvement of quality has helped us fulfill the SCR mission. Thank you for the opportunity to serve.

References


