



Editorial

## Reflections on Memorable Teaching Cases



Reflexões sobre Casos de Ensino Memoráveis

Paula Castro Pires de Souza Chimenti<sup>1,2</sup>

At the 79th Academy of Management Conference, I had the opportunity to attend a lecture by Andrew Van de Ven, who was the keynote speaker for the Teaching and Learning Conference. I was already emotional to see an academic that I deeply admire, and he surprised me with his initial statement, which brought tears to my eyes. He said: “I am very happy to speak to you at the Teaching and Learning Conference because, after all, what are we? We are teachers! We are teachers! Before anything else, we are teachers!”.

It’s funny how such an obvious statement could move me, but the tears can be explained. Nowadays, with so many pressures, sometimes we may end up forgetting our vocation.

I think this was my main reason to accept Professor Wesley Mendes’s invitation to become teaching case editor for RAC. Cases are perhaps the place where the professor and the researcher are most synergistic. They are essentially teaching tools, created for the classroom. However, to create a good teaching case, it is necessary to exercise the researcher’s verve: to investigate, reflect and write.

The other day a student said: “Professor, the class was over, but I kept reflecting on the case that we discussed all week long”. This is one of those moments when I believe I’m doing a good job. Fortunately, it is not uncommon to meet former Master or Executive MBA students and see them talk about the protagonists of memorable teaching cases that keep inspiring them in their professional lives.

For example, I will never forget James Burke, CEO of Johnson & Johnson, who had to deal with the Tylenol poisoning that killed six people in USA in the early 80s (Tedlow & Smith, 2005). Or Strauss Zellnick, CEO of BMG in the 90s, who felt the disruption of the music industry caused by digitization (Rivkin & Meier, 2005). This happens for two reasons: because I attended classes taught by wonderful teachers (Rohit Deshpande and Roberto Nogueira) and because these are amazing teaching cases.

In fact, we all remember a ‘eureka moment’ when we discovered something we didn’t know before. These are delicious and unforgettable moments. Good teaching cases are capable of provoking these moments that inspire and follow us through life. But how to provoke this?

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Craftsmanship and creativity are needed. It's the art that distinguishes an ordinary text from an inspired one. In teaching cases, these skills need to appear both in the case, which presents protagonists and dilemma, and in the teaching notes, which assist the teacher in designing a memorable class.

The elements highlighted below are not a definitive or exhaustive list. Rather, they are the result of reflections I have made from the countless teaching cases I have read and used in my professional life, as well as from several tutorials and courses I have taken on the writing and use of teaching cases, among which I highlight and recommend the Global Colloquium on Participant-Centered Learning, from Harvard Business School. It is also an attempt to respond to colleagues who, since I became teaching case editor, have often asked me: "But, after all, what makes a good teaching case?".

Before proceeding, it is important to highlight two aspects of this editorial:

The first is that this is not a document that teaches how to write cases, for there are great references listed at the end of this text. Roberts (2012) offers a precise step-by-step process for writing cases, as well as Leenders, Mauffette-Leenders, and Erskine (2001). Specifically in Brazil, Alberton and Silva (2018), Faria and Figueiredo (2013) and Roesch (2007) offer excellent overviews of how to produce good teaching cases.

Instead of focusing on the process, which can be very different depending on the circumstances and experience of who will write the case, I will address cases as a final product, emphasizing the elements we expect from a good teaching case.

The second aspect is that, although there are different types of teaching cases, this note deals with problem-cases based on empirical research on organizations or individuals (Roberts, 2012), for believing that they make up the majority of cases suitable for publication in vehicles like RAC. Thus, I am not dealing with demonstration cases (Roesch, 2007), or with cases created from researcher's general experience, or based on secondary data.

## TEACHING CASES

Teaching cases are, above all, teaching vehicles (Roberts, 2012). Thus, it is essential that the author keep in mind what he wants to teach with that case before he even starts to write it. A

good case achieves its learning objectives from a good story and from the analysis that students will make from their reading. With this in mind, I highlight some key elements:

- **Dilemma:** a memorable case has an impacting dilemma, whose solution is far from obvious. Professor Noam Wasserman, an expert in case writing from HBS, once told me during a seminar that nothing beats reality. We were at the time commenting on a case he wrote that begins with the protagonist waking up with a panic attack in the middle of the night (Wasserman & Maurice, 2012). It was not a made-up situation, it was real.

One of the first steps to write a good teaching case is good news for us researchers: discover the dilemma. Interview the protagonists, get to know the history of the organization deeply. The dilemma must not be invented, it must emerge from your research on the case.

- **Protagonist:** every memorable case has a memorable protagonist. Ideally, it is a real person who lived through that dilemma and was the decision maker. Even if you decide to change the name to protect the source, always remember that reality beats fiction. The protagonist is that character that the students need to identify with, whose shoes they will wear. The more thought-provoking, the better the discussion.
- **Data:** it is not enough to tell a story, it is important to present elements for the student to develop his own analysis and reach his conclusions. In this sense, the case needs to bring information that allows an in-depth analysis and provokes a rich classroom discussion. Therefore, the investigative work of the authors is fundamental, seeking information that must go beyond the commonplace and the public domain.

Thus, although every case is a simplification of reality, the data presented should not be obvious or induce a solution. Often managers find themselves in doubt as to which path to take precisely because the reality is complex and chaotic. The data presented should replicate reality as much as possible, sometimes bringing elements that would not be necessary for decision making. Remember that, in teaching cases, the maxim I heard from Professor Jannice Hammond (quoting Rob Freund, from MIT) is worth: "It's not what you cover, it's what you uncover".

## TEACHING NOTES

The better the teaching note, the better the class a case will generate. The teaching note is the place of the author's generosity, when he shares all his knowledge with other instructors who will use the case. For the first-time sailor, the notes offer a safe harbor.

The guiding thread of a good teaching grade is the takeaway, that is, when that class ends, what we want the student to take with him. Each class is organized from a takeaway, which must be surprising and important.

Austin (1993) offers a great guide to write teaching notes, which must contain five main elements:

- Synopsis: what the case is about;
- Positioning: where it fits in a course;
- Learning objectives: why are we teaching it;
- Substantive analysis: what are we going to teach;
- Teaching process: how can we teach it.

In addition to these elements, I would like to highlight:

- **Pastures:** are the big blocks of a case discussion. Good teaching notes provide a guide of pastures, forming a general map of how the case discussion should evolve. This approach is a very interesting one as it allows the discussion within each pasture to be more fluid and loose, while the teacher maintains

control of the class using the general map of all pastures and their sequence.

- **Twist:** this is a personal opinion, which I learned from great masters of classroom such as Kleber Figueiredo and Victor Almeida: memorable cases have turning points. The best 'eureka moments' occur when students are surprised by an unexpected turn of analysis, which seemed to go one way, but ends up revealing another. It is very difficult to write cases like this, so this is not a fundamental element, but it is amazing when it happens. It is also a time when the discussion of the case is closer to reality, because how many times has life surprised us?

## LET'S WRITE MEMORABLE CASES?

I would like to finish this editorial with an invitation. We opened a call for teaching cases that address the business challenges generated by Covid-19 (Chimenti & Marques, 2020). This special call for articles seeks to promote learning in such a difficult time. The idea is to create teaching cases that develop learning and discussion in the classroom about how the world and companies can react to the profound changes we are experiencing. The guest editor, Professor Leonardo Marques, and I are waiting for your work.

Hope to hear from you soon!

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