The AOM IM Division Teaching Committee How to Write Different Types of Cases Series Presents:

Can Case Pedagogy Bridge the Teaching-Research Divide in Business Academia?

Charles Dhanaraj
Evelyn and Jay Piccinati Professor of Management
Daniels College of Business, University of Denver, USA

S. Ramakrishna Velamuri
Chengwei Ventures Professor of Entrepreneurship
China Europe International Business School (CEIBS), China

A hallmark of higher education has been the emphasis on research-informed teaching (Burgum & Stoakes, 2016), as a result of which universities are seen more and more as places to advance knowledge rather than simply transmit it (Joseph-Richard & Jessop, 2020). Business schools too are coming under increasing pressure to encourage closer links between research and teaching, and find new ways to resolve what have been seen as contradictory demands on scholars (of achieving excellence in both teaching and research). In this article, we want to present a rich opportunity and a viable strategy for addressing this issue, extending the existing paradigms of case research and case writing, by innovative models that can bridge them. We refer to case research as activity that leads to output in scholarly journals, and case writing as activity that is focused on pedagogical tools for the classroom that find their outlets in specialized case journals, case clearing houses such as HBS Publishing, China Cases or the Case Centre, and text books, among others.

The advantage of case pedagogy has been well known for many decades. Initially led by the Harvard Business School, it has become a major pedagogical tool in business school curricula across the globe. Publishing and case clearing houses such as Harvard Business School Publishing, the Case Center in Europe, Ivey Publishing in Canada, IESE Publishing in Spain, the China Europe International Business School (CEIBS) in China, the Indian School of Business (ISB) and the Indian Institutes of Management (IIMs) in India, signal the centrality of case teaching in business schools and its broadening geographical footprint. Even accreditation institutions such as AACSB see the "enormous value of case research and writing as a powerful tool for faculty scholarship[1]." At the ten leading business schools, a typical MBA course comprises ten to twelve cases (Nohria & Rivkin, 2018). In the year 2019, HBS Publishing sold 14.5 million cases across the globe[2]. Apart from the pedagogical value, case teaching and writing help an instructor to be grounded in managerial practice and to bring the real world into the classroom. They also help to foster an excellent, managerially relevant learning experience for

[1] https://www.thecasecentre.org/educators/casemethod/resources/features/AACSB
[2] https://www.hbs.edu/about/statistics/Pages/default.aspx

their primary stakeholders, the students. Beyond business schools, the use of case pedagogy is widening across universities including in social work, education, and liberal arts programs (Gross-Loh, 2016).

While the diffusion and growth of case pedagogy is well recognized, what has gone unnoticed is the link between case writing and the increasing use of qualitative research among business scholars, who build and test theories with case studies. Editorial essays in recent years suggest the growing acceptance and even emphasis on qualitative research to understand complex and emerging issues (Aguinis & Solarino, 2019; Bettis, Gambardella, Helfat, & Mitchell, 2015; Crick, 2020; Gioia, 2019; Jonsen, Fendt, & Point, 2018; Pratt, Kaplan, & Whittington, 2020; Van Burg, Cornelissen, Stam, & Jack, 2020). In this short essay, we draw on our own experiences in seeking to build synergies between highly interactive case pedagogy on the one hand and high-quality academic research output on the other. We observe several untapped opportunities for both case researchers and case writers: first, case writers, who are often focused on pedagogical issues, miss seeing the opportunity to advance knowledge with their extensive work on developing case studies for classroom use. Second, case researchers, who are often focused on writing for journals, miss seeing the opportunity for translating many, if not all, of their case research into pedagogical instruments for teaching. While we recognize that there are problems of incentives, and also varied socializations of these two groups, an integration may be in the best interests of business academia. Third, such integration can serve to redress some of the drawbacks of case pedagogy, enhance the quality of cases and improve the way they are taught in the classrooms. Fourth, considering that case writers and case researchers have grown into distinct silos within business academia, such an integration will create cross fertilization of knowledge between these two communities, serving to advance research informed teaching in business schools.

As business schools in many parts of the world become more and more research oriented, faculty members feel the pressure to publish articles in high-quality academic journals as a condition for promotion and tenure. Often, where to publish is being guided by journal “lists” such as the University of Texas at Dallas (UTD) list, the Australian Business Deans Council (ABDC) list, or the Financial Times 50 (FT50) list. The time, effort and craftsmanship that scholars have to invest in publishing, coupled with the uncertainty they face in getting through the journal review process drives them to seek palatable teaching assignments. It is not uncommon to assign young scholars to teach core classes in undergraduate programs and discourage their involvement in graduate and executive education programs. We believe that this forced dichotomy of choosing between good teaching and good research is flawed.

Finding Synergy between Case Research and Case Teaching

We propose three ways in which case development can contribute to academic research: the infusion model, the double-edged sword model, and the string of pearls model.

Infusion Model

By infusion model, we refer to researchers learning about problems and challenges being faced by managers during case teaching or case writing, which in turn lead them to ask interesting research questions that may be explored using either qualitative (for example, case based) or quantitative methods. In a personal communication that one of the authors had with Paul Beamish, the latter mentioned that whenever a doctoral student proposed a new or emerging topic in general management about which literature was scarce or non-existent, he encouraged the student to develop some case studies on the topic to understand the practitioners' perspectives on it. This might be a good approach to understand, for example, how the blockchain technology is being applied in supply chain management and what challenges are being encountered in the process. Beamish has a stellar track record of producing very effective teaching materials, as evidenced by his cases having sold several million copies, as well as high impact research, as can be seen from his nearly 38,000 Google Scholar citations (as of December 21st, 2020).

Double-edged sword model

The second model is the double-edged sword model, which refers to the development of a case, which, after multiple rounds of discussion in the classroom, leads to researchers deciding to go deeper into some interesting aspects of it. For example, the first author co-authored a teaching case in 2016 on Cisco's R&D center in Bangalore, with a specific focus on how the center developed a family of backend routers, called ASR901, which were sold globally. This experience got him and his co-authors to ask the broader question of how multinational companies could think about converting R&D projects from their emerging economy labs into global products. Further exploration of this question in the context of the ASR901 project led them to develop a theoretical framework, which was published in 2016 in the *MIT Sloan Management Review*.

The second author developed the Naturhouse case in 2004, which described how the founder Felix Revuelta came up with a new retail business model for dietary supplements. The most interesting insight from this case was that this new business model had been developed over nearly five years of experimentation involving several mistakes that were corrected over multiple rounds of iteration. Upon conducting a literature review, the author found that while the importance of time in the development of new business models had been acknowledged in prior research, there had as yet been no in-depth study into the trial and error experimentation process in developing and refining business models. He solicited the help of two co-authors in an effort that led to a successful and high-impact paper, the first process study on business models, which was published in a special issue of *Long Range Planning* in 2010.

The synergy between case teaching and academic research even to more technical subjects in business schools. Xiande Zhao, who teaches operations and supply chain management, has worked with a Ph.D. student and a former Ph.D student to develop two teaching cases on the Shenzhen Chuanjie Supply Chain company to demonstrate how to create value for multiple participants in the mobile phone industry. The first case focuses on how to provide supply chain integration services to designers, manufacturers, suppliers, logistics companies and overseas customers through applications of internet platforms and other digital technologies. The second demonstrates how to build supply chain ecosystems and provide supply chain financing services to product designers in collaborations with banks and insurance companies. The authors also developed a simulation game to train students on how to negotiate with other supply chain partners and make supply chain decisions. These cases and interactive games provided students with ample opportunities of in-depth discussions and hands-on experience for making supply chain decisions. At the same time, the research team investigated the effects of information system integration and social interactions between the product designer and the supply chain platform service provider (SCPSP) on the amount of purchase order financing received by the product designer and the effectiveness of new product launches by the product designers. The investigation was conducted with project level secondary data collected from the SCPSP and survey data collected from the product designers. The paper is being revised for publication in the *International Journal of Operations Management* (IJOPM).

String of pearls model

The third model, which we refer to as the string-of-pearls model, involves developing multiple case studies, typically on a new or emergent topic. The influential work done by Chris Bartlett and Sumantra Ghoshal on multinational, transnational, and global corporations and that by C. K. Prahalad and Gary Hamel on the strategic intent of Japanese corporations bear testimony to how powerful ideas can emerge from the ground-up through carefully developed case studies documenting interesting new and emergent phenomena that have not yet been adequately theorized. The second author has personal experience of writing a series of case studies of healthcare delivery organizations in India to document how they provide affordable healthcare to lower income segments of the population through innovative business models. This research was published in *Advances in Strategic Management*.

Key considerations in developing academic research output from cases

There is a vast literature on case study research (for example, Yin, 1989; Stake, 1995), qualitative research (for example, Golden-Biddle & Locke, 2006) and grounded theory research (for example, Miles & Huberman, 1984; Eisenhardt & Graebner, 2007). Once researchers make the decision to proceed with the drafting of a manuscript based on a single or multiple teaching case studies with a view to submitting it to a journal, then they can rely on the excellent advice available in this literature on methods. We wish to draw the researchers’ attention to some additional considerations that they will need to weigh as they proceed.

1. Time to publication: From personal experience, the time needed to convert case study research into a journal article worthy of acceptance in a highly ranked journal is a time consuming exercise, measured in years rather than in months. In formulating their research strategy, young scholars should consider how case study based research would fit into the exigencies imposed by tenure clocks of six to seven years.
2. Type of research question: As Robert Yin (1989) has pointed out, case studies are appropriate when researchers wish to answer process (or how) questions, although a multiple case study design can also address variance questions. Case studies provide rich, or “thick”, perspectives on the phenomena being studied, in ways that statistical studies

cannot. We encourage researchers to develop case writing skills in order to have one more “tool” in their research “toolbox”.

3. Pathway from teaching case to journal article: Single teaching case studies can provide answers to interesting research questions, which typically arise after the cases have been taught in class a few times. Sometimes, it is students who draw the instructor’s attention to issues that earlier may not have been so salient as fertile research areas to explore. For example, the Naturhouse case documented Felix Revuelta setting up one retail outlet in 1992, which was a failure in that it did not meet any of its revenue or profit targets. He then opened a second store in 1993, a third in 1994 and a fourth in 1995. In every new store he introduced variations with respect to the previous ones. He did not open any new outlets in 1996 but continued to document carefully what had worked and what had not. When he was sure that he had arrived at the “right” model in terms of choice of location, size and decoration of the store, the product and service offerings and the staffing, he started to scale the business in 1997 (with 40 new outlets in that year) until he had opened 1,508 outlets (owned and franchised) by 2007. Students repeatedly communicated their fascination with this process and with Revuelta’s resilience and patience during the 1992-1996 period, so much so that the second author realized that the insights might well be worth a journal article.
4. A teaching case study has limited pedagogical objectives and the instructor’s goal is for the students to take away one or two key learning points from the discussion. Therefore, data for the teaching case study are unlikely to be either abundant enough or from diverse enough sources to suffice for a full-length journal article. This means that the researchers need to be prepared to go back to the subject organizations for additional rounds of data collection. They may also need to broaden their sources of data beyond the subject organization itself.

To summarize, we submit that case pedagogy can be fruitfully combined with case research to bridge the teaching-research divide that has unfortunately developed in business academia, and in the process enrich both the classroom experiences of students and the researchers’ own research portfolio.

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