

How to Write Cases and Teaching Notes in Marketing Education?

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Abstract: This paper presents guidelines for developing cases and teaching notes for marketing classes in higher education. Cases are often used in problem-based learning, where students are placed in a problem or decision-making situation and are encouraged to take the role of problem solvers. The recommendations for case writing are based on analysis of high-level examples of marketing cases, published in the most prominent global publishing databases, along with more than 15 years of experience of the authors. This paper explains the process of writing cases depending on the source of data and tackles all necessary issues that should be addressed. Writing teaching notes is focused on providing the supportive material for a case that helps a lecturer understand the reason for writing the case, the questions that might arise from it and the professional or theoretical points that should be raised in discussion. This paper should contribute to interactive learning and provide lecturers with detailed recommendations for writing cases in the marketing field.

Key words: writing cases, teaching notes, marketing, higher education

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1. INTRODUCTION

The main role of educational institutions for business studies is to help students develop managerial skills and prepare them for their future careers (Burke et al, 2013). Teaching at higher educational institutions in Eastern European countries, was and still is predominantly based on traditional ex-cathedra lecturing and transmission-based teaching, rather than constructivist approaches that allow the development of critical thinking skills (Mijatovic & Jednak, 2011). A research study from Singapore points out that lecturers and educational institutions need to be responsive to changes and improvements in interactive learning, and one of the ways to do this is to use the case method in the classroom (Chong, 2012). Furthermore, the International Association for Management Education has created mission-driven accreditation standards that are nearly impossible to meet without the use of case pedagogy in higher education (Crespy et al., 1999). Additionally, many changes have occurred in the context of marketing education, including the use of new technology-based (Hall and Witek, 2016) and experiential learning (Kolb and Kolb, 2005). Rather than having lecturers telling students what they know, they need to ask questions that lead students along the path of learning. Lecturers also need to become better storytellers, speak more vividly, communicate more visually, and work hard to keep students engaged and involved.

The case method will become an even more important means for interactive learning. While the case method is evolving, it has a rich history in marketing education. Just knowing about marketing has not been viewed as adequate preparation for a career in marketing. Students must have the opportunity to practice problem solving and decision-making in a marketing context. This is precisely what the case method is all about (Hawes, 2004). The case method is not only the most relevant and practical way to learn managerial skills, but it is exciting and beneficial for students (Karns, 2005). It calls for discussion of real-life situations that business executives have faced. Furthermore, it helps sharpen analytical skills, develop problem-solving approaches and the ability to think and reason rigorously (Hammond, 1976).

Although marketing lecturers recognize the need and benefits of utilizing the case method in their lectures (Yadav, 2007), the experience of the authors shows that lecturers often do not know how to prepare the case and teaching notes for the class. Generally, there is some misunderstanding in academia about the difference between teaching cases and research cases. According to Farhoomand (2004) writing a teaching case is more comparable to writing a spy thriller than a research article. The purpose of this paper is to present guidelines for preparing materials for class, including cases and teaching notes. The guidelines are developed on the basis of secondary data, available literature and instructions provided by reputable case study databases, but also the experience of the authors who have used the case method in lecturing for over 15 years.

Salles et al. (2015) identified that teaching cases are sorted into three different categories according to the way they are used in the classroom. The first category is case-statement, which is used to illustrate lectures to demonstrate good marketing management practices that have been applied in a given situation. The second and most complex category is case-problem. Students are urged to identify management problems, discuss possible solutions and weigh the advantages and disadvantages of each. The third category is case-analysis, where students are asked to analyze cases and their variables in order to relate them to the problems. Haskins (1992) identified two types of teaching cases: the purely descriptive and the decision-oriented. A descriptive case generally describes a situation, the related facts and the decision, and is often used to exemplify the good or poor implementation of a technique or framework. On the other hand, the decision-oriented case is problem based, including problem identification, analysis and action planning, providing a strong basis for discussion and learning. In this paper we will focus on problem-based learning or decision oriented cases, as the authors have found them most useful for developing managerial skills of students.

The paper is structured as follows: the next section outlines the main steps in the case writing process. The third section examines the main elements of a marketing case, followed by the fourth section, which explores how to develop teaching notes for the case. In the fifth section, the authors give advice for publishing cases and teaching notes in marketing. The last section presents conclusions and identifies future directions for research in this field.

2. IDENTIFYING THE SOURCES OF DATA FOR CASE WRITING

The first step in writing cases is deciding the data source for the case. Cases can be written using one of the following sources of data: primary source with the approval given by the company that the case study is being written about, secondary source and professional experience of the author/s. (Damnjanovic, 2011). In this paper, guidelines for all three ways of writing cases and teaching notes for marketing lecturers will be outlined.

2.1. Primary source of data for case writing

In using a primary data source, authors have to choose a company that will provide the data for the case. David (2003) gave some advice on how to select a case company. He suggested that it could be an existing organization undergoing strategic change or doing business globally, an organization that is in the news, as well as an organization operating in industries familiar to the students. One of the most productive sources of case leads are former students from an alumni network (Haskins, 1992). The alumni network can bridge companies willing to cooperate and universities.

After choosing a company, case writers should contact the company's Marketing Department representative. Case writers usually receive necessary data from various management levels including: Marketing Director, Brand Director, Product Director, Shopper Marketing Director, Sales Director, Digital Marketing Director or Chief Marketing Officer.

Firstly, case writers prepare the draft version of the teaching case with primary data from the company as well as all available data from secondary sources. Next, case writers should discuss the draft version with a company representative and agree about potential changes and revision. It is important to emphasize that writers can modify some data to protect confidential business information.

Prior to publishing the case, it must be approved by the CEO of the case company. The confirmation is usually given via the Case Release form, presented in Figure 1 (Leendres et al., 2001). According to The World Association for Case Method Research & Application, formal release of the case protects both sides from misuse of data (Swiercz, 2016).

Using primary sources of data for case writing has its advantages and disadvantages. The greatest value is the direct contact with the company. Company rep-

FIGURE 1. Case Release Form (Leendres et al., 2001)

Date: _____

We have read the case entitled _____ and we hereby authorize the use of this material:

By the University

By other Schools with which the University operates a case exchange program

By other organizations requesting this material for use in educational or training programs only

In printed casebook/textbooks

In electronic formats

This case is released:

without charge

with corrections as indicated

Signature _____

Position _____

Company _____

If corrections are indicated, a copy of the final released version will be returned to you.

representatives can be asked to introduce the case in the classroom and give valuable insights from the industry, market or everyday business. Ultimately, students receive information through this medium that would be difficult to retrieve from other data sources. The greatest downside to using primary data is the substantial amount of time necessary to properly structure the case and complete the company consultation and consent process.

2.2. Secondary source of data for case writing

The second option for writing cases is to use secondary data that can be retrieved from already published sources. It can be obtained from a myriad of documents, such as annual reports, industry surveys, professional association reports, company websites, Internet, television and radio reports, books, magazines, trade publications and others. A strong recommendation from the Case Centre is to acknowledge the cop-

TABLE 1.

Case database	Web page
The Case Centre (ECCH)	https://www.thecasecentre.org/main/
Harvard Business Publishing	https://cb.hbsp.harvard.edu/cbmp/pages/home
Ivey Publishing	https://www.iveycases.com/PublishCases.aspx
Asian Business Case Centre	http://www.asiacase.com/
INSEAD	https://cases.insead.edu/publishing/
IBS Center for Management Research	http://www.icmrindia.org/
Asia Case Research Centre	http://www.acrc.hku.hk/casecompetition16/index.asp
Emerald Emerging Markets Case Studies (EEMCS)	http://emeraldgroupublishing.com/products/case_studies/index.htm
Times Case Study	http://businesscasestudies.co.uk/

SECONDARY SOURCE: Recommended case databases for locating cases in Marketing

wright of the material prior to using it. Furthermore, data used from secondary sources must be referenced in a list at the end of the case. In particular, the link and the date of downloading have to be stated for Internet sources.

As secondary sources are generally publically available, there is no need to get the permission from the company for publishing the case. Another advantage of using secondary data is that the authors can update the case with the latest information in a timely manner. The main obstacle of using secondary sources is the fact that sometimes it is hard to find relevant data that authors need to write a good case.

The main source for cases based on secondary data is case databases. Table 1 presents a list of the most relevant and popular case databases worldwide.

2.3. Professional experience of the authors as a source for case writing

Finally, cases can be successfully written on the basis of the author's professional experience. Usually, the authors write a case based on a situation in which they were involved. In this situation, company names are altered. An example of such a case can be found in AT Kearney (2012).

3. THE STRUCTURE OF A CASE IN MARKETING

A case may consist of one or more scenarios, and it may take many forms, from a traditional paper-based document to videos or audio recordings. There is no limit for the amount of content in a case, but David (2003) recommends 10 to 15 pages as an optimum for strategic marketing cases. The structure of a case is usually presented as a funnel, with information narrowing down from general data to specific requirements of the case (Figure 2). Standard elements of a case in marketing are an opening section, main body and conclusion.

The opening section usually consists of one to three paragraphs, serving as the stage setting and a "hook" at the same time. In this section various contextual questions are answered including when, where, who, what, why and how. Case writers should present the protagonist (name and position of the decision maker), what kind of a decision he/she has to make, when and where this is happening, and why and how this would happen (RSM Case Development Centre, 2016). Having a decision-maker persona for

the students to adopt is not an absolute requirement but often highly recommended (Sjoblom, 2014). Data that is already available and additional data that needs to be gathered should be included in the opening paragraph as well.

To better understand how to write the introductory section, we present the example below (Damnjanovic, 2011b): "One chilly evening on the 29th of September 2008, Mr Lazar Stojkovic, founder and CEO of touche' Solutions, a high-tech enterprise based in Serbia, was returning home from work when he observed a group of young people in the street gathered around a shopping window decorated with interesting fluorescent colors. They were amazed by the design and commented enthusiastically. Lazar was analyzing the market research information he had collected regarding the launch of his new product, an interactive shop window display, product name "streetone", that had been targeted for release in November 2008. He came to the conclusion that shop windows in the center of Belgrade, would present the most attractive location for positioning the new product and potentially yielding the highest financial rewards for the business. He was thinking about the optimum way to deliver the company's sales plan with a relatively limited budget. Funding had been significantly depleted after heavy investment in the research and development of the streetone product range. The key now was to prepare a strong sales presentation for his upcoming meeting with potential sales partner Mr Zvonko Radovanovic' on 20 October, the chief manager of the client-relations section of Energoprojekt-Energodata Company in Belgrade. He also had in mind three primary client segments: Banks, hospitality and tourism agencies. These had to be assessed and agreed within a four week deadline, and would inform the strategic direction the business would take in capturing these segments".

The main body of the case follows the opening section. It usually includes general company background, specific area the case covers, specific problem or decision that needs to be addressed and alternatives as possible solutions. According to Balakrishnan (2010) sub-headings should be used as they allow students to follow the story and easily find information. In order to present the structure of a case, two examples are summarized in Table 2.

The experience of the authors has shown that it is important to identify available data and note for each part of the case where research for additional data is required (Figure 2).

TABLE 2. Examples of Case structure of main body of the case (Damnjanovic, 2011a)

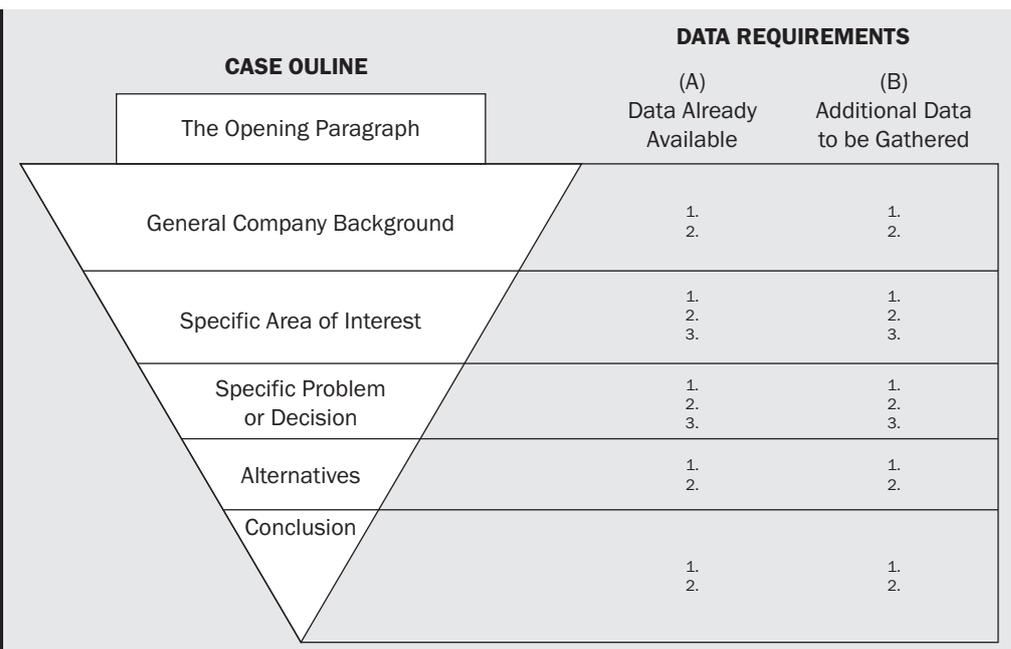
Case outline of main body by subtitles	Example of subtitle for AMC Case	Example of subtitle for The Hyundai brand
Company Background	The AMC Company	About The Hyundai Company
Description of specific area of the case	Portfolio Editions	The Automobile market In Serbia
Specific problem or decision	Description Of The Women's Magazine Segment	Founding Of The Hyundai Club
Specific problem or decision or Alternative	Launch of Magazine Sensa	Hyundai Cafe – A New Meeting Place For Hyundai Car Lovers
Final closing	Conclusion	Conclusion
Additional material, statistics, charts, tables)	Figure 1,2,3 and Table 1.	Figure 1,2,3 and Table 1.

The final part of a case is a conclusion that should summarize the basic data and pinpoint the tasks for students. The following example illustrates how to formulate a conclusion (Damnjanovic, 2011c): “The marketing manager of Sensa magazine hired you as a consultant of the company Adria Media Serbia Ltd. to think about future promotional activities for the period between June of 2008 and June of 2009. The ATL activities (advertising, media appearances) have already been implemented, so the company plans to use that period to focus on BTL activities – sales promotions, organization of special events and promotions at the point of sale, direct communication with customers – with respect to the target groups’ demands. The total costs of promotional BTL activities amount to 80,000 euro. The marketing department is also in a dilemma on how to devise the introduction of ad-

ditional product lines for the Sensa brand, and thus obtain a better market position.”

Cases are usually published in one of the databases previously listed in Table 1. More than 35.000 users are registered in the Case Centre at the global level. This network provides the opportunity to share cases with colleagues, improve collaboration with universities and companies and prepare students for their future career in marketing or more generally. For the purpose of publishing, a case should be tested in the classroom. This should be clearly noted in the case. This comprises statements of the context in which the material was taught, name of the institution at which it was taught, name of the lecturer who taught it, date when it was taught and the number of students in the classroom (The Case Centre, 2016). An important note is that the case will be used for educational pur-

FIGURE 2. The organization of the case and data requirements (Leenders et. al, 2001)



poses. After the submission of the case, the first page should include the logo of the educational institution, and accompanying text. An example is provided below:

“This case was written by Vesna Damnjanovic (University of Belgrade, Faculty of Organizational Sciences). It is intended to be used as the basis for class discussion rather than to illustrate either effective or ineffective handling of a management situation. The case was compiled from field research. © 2017, University of Belgrade, Faculty of Organizational Sciences.

No part of this publication may be copied, stored, transmitted, reproduced or distributed in any form or medium whatsoever without the permission of the copyright owner.” (Damnjanovic, 2011c).

4. DEVELOPING TEACHING NOTES FOR THE CASE

A case is often accompanied by a set of teaching notes, one to several pages long. The teaching notes provide instructions for subsequent users of the case, whether it is the author or another individual. The notes are intended to help the lecturer understand the reason for writing the case, the questions that might arise from it and the professional or theoretical points that might be raised in discussion (Millar, 1999). Teaching notes can help lecturers facilitate the presentation of the case in class. The structure of teaching notes depends on the author and the type of case, but usually it includes the following parts (The Case Centre, Ivey Publishing):

TABLE 3. Example of teaching notes for the case Adria Media Serbia (Damnjanovic 2011 c, modified by the authors)

Course	Marketing, Marketing Research, Brand Management
Target audience	Undergraduate, MBA/post-graduate
Topics	Marketing research, Market segmentation, Positioning of the new brand, Brand extension strategies
Teaching objectives	Understanding the role of the marketing research process in the process of launching a new product brand into the Serbian market Identifying the specifics of brand positioning of the Sensa magazine brand
Relevant Readings	More about Sensa brand: http://www.lovesensa.rs/ Baltes, (1998), Magazines As Brands More about brand in publishing: Branding Solutions For Tomorrow’s Publisher, Wessenden Marketing and First Magazine Marketing, http://www.brandlabuk.com/Branding%20for%20Tomorrow’s%20Publisher.pdf The future of research New Censydiam: Ipsos Asia Pacific (2016), http://ipsosasiapacific.com/wp-content/uploads/sites/3/2016/07/03-New-Censydiam.pdf More about Brand extension: Damnjanovic V. (2011), Hyundai brand, CASE - Reference no. 510-038-1, The Case Centre
Assignments	Educator case introduction <ul style="list-style-type: none"> • Explain the difference between qualitative and quantitative marketing research (10 minutes) • Present students with the characteristics of the publishing industry in Serbia (5 minutes) Student assignments: <ol style="list-style-type: none"> 1. Discussing and understanding the meaning of the Censydiam approach? (20 minutes) Damnjanovic (2017) 2. Analyze the target groups for Sensa magazine (10 minutes) 3. Define a BTL promotional activity plan for Sensa magazine (20 minutes) 4. Propose brand extension strategies for Sensa magazine (15 minutes) 5. Summary of the discussion (10 minutes)
Learning outcomes: Key knowledge and skills	<ul style="list-style-type: none"> • Using marketing research information for making business decision • Understanding brand positioning and premium magazine segment • Development of a new magazine brand through a promotional below the line (BTL) activity plan • Market segmentation skills based on social and individual (personal) dimensions

- Case study title, where the case study name is emphasized.
- Description of the case study, a short description of the particular case.
- Learning objectives, the part that defines the study goals to be accomplished in a class. There is also the option of defining priorities within the study goals – primary as the main goal and secondary as side goals.
- Course that a case is suitable for, as well as the level of studies for which a case is appropriate.
- Relevant readings that are recommended as an additional material for deeper understanding of the case. These readings could be given in the form of a framework, theory, etc.
- Assignment questions, which match the headers of the Analysis section.
- Main problems of the case, which provide rationale for the lecturer applying the case in the learning process.
- Additional materials for the case, such as TV commercials, photos, articles and videos. A recommended reading list is also a good addition. It is important to offer additional sources, such as books, articles, and websites, for the students that are particularly interested in the subject.
- Real scenario of the case, which provides a brief summary of the actual outcome of the situation. Here, the focus should be on the decisions that were actually made and their results.

Generally, case authors need to define the target group of students and types of marketing courses where a case can be used and decide whether it is more suitable for the undergraduate, graduate or executive program. Sometimes case writers define that one case can be used for different levels of studies, but they should specify different teaching strategies to be used. Furthermore, it is useful to connect the case with theoretical methods (eg. SWOT analysis), techniques

(eg. Censydiam segmentation approach) and models (eg. sales funnel) used in Marketing. Finally, the examples of good practice show that marketing lecturers and students want to have specific tasks for each case. Additionally, lecturers should determine the knowledge and skills that the students would improve as learning outcomes. Relying on the experience and practice of the authors, Table 3 presents an example of teaching notes.

5. CONCLUSION

After many years of using cases in lecturing, the authors have identified a lack of lecturer experience in case writing limits the application of cases as a learning method. This paper gives recommendations of using cases in teaching as an interactive method, which supports the development of managerial skills of students, including: presentation skills, working under pressure, team work, problem solving and analytical skills. Based on the results of secondary research and analysis of the instructions provided by the leading global publishing case centers combined with 15 years of the experience of the authors, the steps of case writing were identified. All necessary issues that should be addressed during the process of writing cases, as well as teaching notes were explored. The steps are explained and illustrated with examples of good practice in case writing.

The main limitation of this study is the fact that it only represents the perspective of lecturers. Future research should include the opinion of students as well, which will provide a broader view of applying the case learning method in marketing courses.

This paper should help marketing lecturers to improve their knowledge and skills in writing cases and teaching notes and encourage them to use this method in the classroom in order to provide better learning outcomes.

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Apstrakt:

Kako pisati studije slučaja u edukaciji iz marketinga?

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Ovaj rad daje uputstva za pisanje studija slučaja i savete za nastavnike za realizaciju časova iz oblasti marketinga u visokom obrazovanju. Studije slučaja se često koriste u učenju koje se zasniva na rešavanju problema, gde se studenti ohrabruju da preuzmu ulogu onoga ko rešava problem. Preporuke za pisanje studije slučaja su zasnovane na analizi primera studija slučaja iz marketinga, objavljenih u najeminentnijim globalnim izdavačkim bazama, kao i na 15 godina iskustva autora u ovoj oblasti. U ovom radu objašnjava se proces pisanja studija slučaja u zavisnosti od izvora podataka, uz davanje odgovora na sva pitanja koja

se javljaju tokom procesa. Pisanje uputstava za nastavnike predstavlja pripremu dodatnog materijala koji pomaže da predavač razume razlog za pisanje studije slučaja, pitanja koja mogu da se jave tokom pisanja, kao i profesionalne ili teorijske teme koje je potrebno spomenuti u okviru diskusije. Ovaj rad bi trebalo da doprinese interaktivnom učenju i da obezbedi predavačima detaljne preporuke za pisanje studija slučaja u oblasti marketinga.

Ključne reči: pisanje studija slučaja, uputstva za nastavnike, marketing, visoko obrazovanje

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