



EMERALD

EMERALD

# Pedagogical Guidelines

Teaching cases



Written by Charlie Harris, 2021



This work is licensed under CC BY-NC-ND 4.0

Co-funded by the  
Erasmus+ Programme  
of the European Union



DISCLAIMER: The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

# Guide to Case Study Writing for Business History Students

## What is a case study?

### 1) A case study is:

- i) *a real-world example used to teach a specific concept* – with the cases, the teaching point will be some aspect of the global history of business. Teaching points in previous cases have included: what a pause between industrial revolutions looks like (Merchandise Mart); China was the centre of the global financial revolution (Ri Sheng Chang); social and corporate reputation are interdependent and can change whole industries (Equitable).
- ii) *Focused* – in general, the case should be framed around one key teaching point and focus on one story, be it the story of a company, an individual, or even a building (to name three examples).
- iii) *a start to a discussion* – cases are used as a starting point to frame discussion-based classes. A case study should provoke questions among students and inform discussion relevant to the central teaching objective.

### 2) A case study is not:

- i) *an academic article* – the aim of a case study is not to push forward scholarship in a certain research area; instead, the aim is pedagogical. A case study should not be written to specialists. There should be no (or at least minimal) jargon.
- ii) *a chapter* – unlike a chapter, a case study is a complete story. A reader should not need specialist external information to understand the case study.
- iii) *an end to a discussion* – unlike much academic writing, a case study is not intended to persuade as much as it is intended to provoke discussion. A case is not written in an argumentative style. While the teaching point is the driving thesis of the case study, the case study will inform discussion on the topic rather than clearly lay out all the answers.

## Researching the case study:

- 1) Wikipedia is often a good place to start. It is also helpful to read a couple of broad stroke general histories of your subject; getting a broad overview allows you to focus your research once your areas of interest have been identified.
- 2) Bibliographies normally include a mix of popular and academic works. Relevant academic books/articles can be found by using the JSTOR online database, Google Scholar, and university library search databases. Journals that may feature relevant articles include *Business History*, *Business History Review*, and *Enterprise and Society*. *The New Yorker*,

*Smithsonian Magazine*, *New York Times*, and *The Economist* also often feature relevant articles.

- 3) It is usually helpful – and necessary – to use sources produced by the institution in question. But be wary of being over-reliant on these sources – they have an inherent bias towards telling a positive history.
- 4) Ideally, you would draw on a range of primary and secondary sources. With many archives still closed, it won't be possible to access certain documents and objects, but there are still ways you can reference primary sources in your case study. There are many online resources (including digital archives) used by business historians. A comprehensive list can be found here: <https://thebhc.org/extensive-list-online-teaching-resources>. It is also worth noting that many museums have online galleries. Other digital resources you might find helpful include Google Books, The National Archives, and The British Newspaper Archives.

#### Writing the case study:

- 1) The case study should be a readable and engaging story with a clear narrative driving the structure. Although decision points are often used in regular business school case studies, the historical case study is not based around a decision point. Most historical cases tend to be chronological.
- 2) The case study should provide plenty of historical context so that non-specialists will be able to fully understand the historical importance of the case study. Explain things in an accessible way – e.g. instead of saying X earned £5,000 in 1913, say X earned £5,000 in 1913, which was around x times the average wage at the time.
- 3) Try to write in as clear a style as possible. The case study should be written in full sentences, not note form. Avoid using acronyms. Lengthy block quotes should be avoided as they detract from the flow of the case study. In general, quotes should be kept to a minimum. As you write, you may want to read the document out loud. You'll find that overly complicated sentences are difficult to read out loud. Which is a problem. Simplify things so that the sentences don't try to do too much at one time. Vary your sentence length, try not to use the same words over and over, use active voice to make causation clear. If someone who reads your work raises a question, improve the sentence – don't presume that they are the problem. You are aiming to write something that is readable by the general public, even if they are not specialists. A case study should be interesting to a wide audience.
- 4) Most people choose to organise the study into several sections with headings. Try to keep everything fairly evenly weighted. It's easy for a narrative to get lopsided otherwise – devoting far more space to one period of time than another. If you find that your case is centring on a particular era, then consider narrowing the focus of the case to that era in particular, and simply offering historical context in the introduction and conclusion.
- 5) The introduction and conclusion need to frame the main body of the case and hint at its teaching point, without giving it away. Think broad, not narrow, when framing introductions and conclusions. You want to engage people with big questions, not narrow

specifics on the way in and the way out. A typical case study introduction briefly describes the institution/individual that will be the focus of the case and situates the example in its broader context. Some case studies start with a discussion of the contemporary situation (e.g. Ri Sheng Chang), but most start by discussing the early history of the institution/individual. The case study conclusion should not explicitly 'answer' the central questions of the case study. Often an epilogue style conclusion will be more suitable than a traditional academic conclusion. Typical conclusions often relate to an individual or institution's demise/end/adaptation to new business era/etc. It is often good practice to use part of the conclusion to consider the impact that the case commodity has had on the industry more broadly, or even on society as a whole.

- 6) The case, including images, must be fully referenced with endnotes.
- 7) Try to avoid speculation. In class, students can think about what the case study tells them about the future. The case study should only focus on what has actually happened.
- 8) As above, bringing a case all the way to the present is a good way of ensuring that it will be outdated in a few years. Avoid using temporal signifiers such as 'now' or 'recently', and be wary of making predictions.
- 9) Selecting appropriate visual and material objects to illustrate the case is an important part of case study writing. It can be helpful if the case includes some sort of reference to the local environment e.g. to a coin collection held in the Ashmolean Museum. People enjoy making comparisons to things that they already know.

#### Writing the teaching note:

- 1) Typically, teaching notes are designed to allow an instructor to lead a group of 30 students through a one-hour long analysis of the case. The teaching note should explain the pedagogical point of your case study. In the main body of the case study, it is important not to be explicit about the teaching point but in the teaching note, you should be clear. In which week would your case study fit on a business history course? What is the main teaching point(s) of the case?
- 2) An important task of an instructor is to help students contextualise the case. In the teaching note, it should be clear what students need to know about the period, institution/individual and industry that is not made explicit in the case. The teaching note should also highlight any major scholarly works that it is important for the students to know about.
- 3) In the teaching note you should explain how you would introduce the case, discuss its major themes (usually around 2-4) and wrap up the discussion. For each section, you should give an indication of timings. This is usually best judged by teaching people, not simply by guessing.
- 4) Think carefully about how a class of students could be led through a discussion. How would you build up from a simple to complex analysis of the case? What questions might you need to ask? What specific sentences or paragraphs of the case study might you elaborate upon in class?

- 5) The teaching note should detail how the instructor can use at-hand examples to guide class discussions. In your own classes, you will have seen how the lecturer draws on immediate examples to illustrate broader points about the case. For example, in Berry Brothers, turning to a student with a laptop, the lecturer might ask: who manufactures the laptop? Then: who manufactures the keyboard? Then: who manufactures the processor? The student will generally know that their laptop is, say, an Apple with an Intel processor, but won't be able to tell you who manufactured the keyboard. What does this tell us about the dominant brand in the value chain? What is the dominant brand in the case of wine?
- 6) In the teaching note, you might explain how parallels can be drawn between your own case and other case studies that you have read in and out of class. You should also highlight any comparisons that can be drawn between the individual/institution that is the subject of your case and other individuals/institutions.
- 7) Images, objects, and even jokes can all be useful teaching prompts. What props might you use in teaching? Are there any images not in the case that you might want to show? Are there any images in the case that should be examined in greater detail? What about graphs or appendices? Should they do a simple calculation based on numbers from the case? Why?
- 8) It is helpful to think about the practicalities of teaching the case. Some of your classes might take place in museums or businesses rather than lecture theatres. What would be the ideal environment for teaching your case study? How could you make use of the local environment in your teaching?
- 9) Each group of students will have a different response to the case study and it is important to build in flexibility. Try to think about what directions might students take the conversation in, and when you should and shouldn't rein them in.

Finally – have fun with it!

Remember that the best historical case studies are actually fun to read. If you enjoy the topic, let that come through in your writing. This should be a cracking story that you can tell friends over a meal and then reveal that the hidden element is something that is useful for them in understanding the wider world, just like a good magazine article or a short story. If telling that story is dull for you, it will be dull for your reader.