



CASE BY CASE

Professor Gina Vega is Founding Director of the Center for Entrepreneurial Activity at Bertolon School of Business, President of Organizational Ergonomics and Editor of *The CASE Journal*. She reflects on the evolving role of cases in management education

How significant are cases to you and your research?

Nearly every positive professional outcome I have experienced can be traced back to cases, including two Fulbright assignments, the opportunity to edit *The CASE Journal*, and the chance to have an impact on the work of other scholars. I feel I owe any success I have achieved to the case writing community and to what I have learned from the excellent case writers who have guided me. My disciplinary research interests have taken three streams from the very beginning of my academic career: entrepreneurship, business ethics and organizational transitions. My dissertation used cases along with more traditional empirical research, and probably half of my 70 or so publications have been case-based.

I have just completed co-authoring a textbook, *Entrepreneurial Finance: Concepts and Cases*. Each of my books has leaned heavily on cases in various formats, and my current research is nearly exclusively case-based. I can think of no more valuable use of my research and writing efforts than producing the kind of instructional materials that help students learn how to apply theory to practice, how to solve problems and how to reflect in a disciplined way. I am currently working on a collection of short cases that can be used in a classroom setting without prior preparation on the part of students. I am particularly interested in developing new ways to teach with cases online and am working on a project related to this area, having conducted some empirical research with a colleague about distance learning and the use of technology in case delivery.

You specialize in teaching case writing workshops. Who are these workshops aimed at and why is it important to use case studies and simulations?

The case writing workshops I run are geared towards academics, graduate students and practitioners who want to advance their thinking about 'the way things work' in organizations. Cases offer learners the unique opportunity to see themselves in the shoes of decision makers, but with the safety net of knowing their decisions cannot have a negative impact on the organization in question.

Depending on the level of the learner, students may be expected to practice techniques, apply theories, review and reflect upon past decisions, design new programmes, or evaluate the effectiveness of existing ones. Undergraduate students are exposed to situations they might experience in the future, and graduate students gain perspective while analysing current challenges in their business lives.

Corporate representatives have told me how helpful the case writing process has been for them in terms of looking at their companies through new eyes, without their 'normal' filters. As instructors, it is our responsibility and great privilege to provide such opportunities to our students.

In your most recent title, *The Case Writing Workbook: A Self-Guided Workshop*, you provided concrete advice for researching, writing and teaching cases. What do you consider the most important considerations for successful, relevant case writing?

Rule #1: Keep the reader in mind. I always recommend that case writers begin their process by knowing what they want the reader to learn (the learning objectives). Only then can they successfully develop and produce a case that is relevant and of value, not to mention publishable in academic peer-reviewed journals.

To my mind, the instructor's manual (IM) or teaching note is the more valuable element of the case. Without it, all you have is a good story. The IM highlights the author's academic generosity and willingness to share what has been learned in the past with the instructors of the future. It is where the author gets to shine a light on her knowledge and intellectual contribution, as well as to provide credibility for her scholarly work. Case writing is all about learning, and the case writer's goal must be to facilitate learning on several levels – learning for the students and learning for the instructor.

As President of Organizational Ergonomics, could you outline its main goals and services, and your responsibilities?

I established Organizational Ergonomics 20 years ago as a consulting firm to assist small businesses that did not have the 'deep pockets' needed to hire the larger, more corporate-focused consulting firms. Over the years, the focus of the work we have done has shifted away from general consulting to small businesses and toward our current model, which is academic consulting. We are professional writers who pride ourselves on providing both academic writing assistance for faculty and commercial technical writing for corporations. We offer international workshops on case development, research, writing and teaching, with a goal toward encouraging more participation in the case research field. I am both the owner of the firm and its primary workshop conductor. I also run case writing competitions and perform other case-related services, including editing and preparation of case collections.



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How does Organizational Ergonomics encourage and support education and career development?

I am pleased to report that Organizational Ergonomics has the reputation of 'growing' case writers and developing case writing communities in colleges and universities. Several universities in the US and Canada have established a case writing culture among faculty and a case teaching structure for their classes, both face-to-face and online as a direct result of programmes we have run for them. We have also established a case competition and case-writing support through Best Case awards at various international levels for a large international professional association.

Overall, in what capacity do you work to forge relationships between industry, academia and government?

I encourage schools to build relationships with their local Chambers of Commerce and Small Business Development Centers (SBDCs are the outreach and consulting groups of the US Small Business Administration). When these relationships are strong, access to companies for case writing becomes easier and company leaders are often willing to come directly to classes when their cases are being discussed. This enhances the teaching and learning process and encourages interaction between management students and local industry leaders, leading to future employment of graduates and strong connections between 'town and gown.'

At Salem State University, Massachusetts, I launched the Center for Entrepreneurial Activities, which served as a connector between the local SBDC, alumni business owners, the business incubator and university students. This led to a significant number of regional and local cases to which the students could easily relate.

As Editor of *The CASE Journal*, how have you seen the landscape of management education research change over the past five years?

Over the past five years, I have increasingly seen research that is focused on student learning rather than pure disciplinary research. I suspect that this is, in part, a function of the Association to Advance Collegiate Schools of Business' (AACSB's) focus on publications that reflect the mission of the university rather than esoteric topics of interest solely to the researcher. In other words, our research needs to have a purpose; simply exploring an interesting topic is not sufficient to meet the current standards of scholarship, at least in the US and in schools with a pedagogical mission. I think this is a good change, overall. People should research what they are interested in, but more importantly they should be producing materials that can be used by others for advancing learning. As a result, management research is becoming more practical and more applications-orientated.

What insight have you gained from your vast experience in case writing?

The more I meet with people at workshops, conferences and other venues, the more I am convinced that we need to encourage academics and practitioners to write shorter

cases – what we at The CASE Association call 'Compact Cases' and which go by many other names depending on the organization producing them. Instructors are concerned that their undergraduate students are often unprepared when assigned a full length case, and it has been my experience in teaching that my students did not prepare as thoroughly as I would have liked. Poor preparation limits discussion significantly and reduces the benefits normally derived from cases in the classroom. If we provide cases that are short, current, factual and engaging, better learning will result. Learning, after all, is the reason we are writing 'teaching' cases as instructional materials.

In the coming five to 10 years, where do you foresee the role of case studies in management developing?

As more and more courses are taught online and distance learning becomes mainstreamed, cases will have to speak to this mode of delivery. That opens the door to technologically enhanced case studies, including YouTube clips, direct links to newspaper reports and magazine articles, access to public financial records, and other documents for student research. Right now, delivery of such cases is a challenge for most journals, even for those that are fully online, such as *The CASE Journal*.

The traditional peer-review process can also be problematic for technologically enhanced cases, as not all academics have sufficient computing power at their homes (which is where most of us do our reviewing) to download all the necessary documents, and not all students have the requisite computing power to handle the case documents and links. Shortly, however, I anticipate that these problems will disappear in the developed world and in developing nations as well, and a new world of case writing will appear.

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