Cases are Stories: Writing Better Cases By Learning From Narrative

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> "The most amazing thing for me is that every single person who sees a movie . . . brings a whole set of unique experiences, but through careful manipulation and good storytelling, you can get everybody to clap at the same time, to hopefully laugh at the same time, and to be afraid at the same time."
>
> Steven Spielberg, film director

> "The purpose of a storyteller is not to tell you how to think but to give you questions to think upon."
>
> Brandon Sanderson, author

> "Storytelling reveals meaning without committing the error of defining it."
>
> Hannah Arendt, historian and philosopher

WHY IS STORYTELLING IMPORTANT?

Cases exist to help achieve teaching and learning goals. As seen in the quotes above, this matches an essential reason why stories exist in the first place: teach, learn, and explain. Consider fables and fairy tales, or stories that come from long ago (e.g. "How the Tiger Got its Stripes") or how most religions are taught (e.g. bible stories). Our brains are wired for stories[1] and we comprehend and explain the world around us in this fashion. Even something as simple as teaching addition or subtraction is often done through storytelling (e.g. "If Xin has two apples, and Amir has three apples, how many apples do they have together?" is adding aspects of a story to a dry math question). Stories like "Anansi and the Pot of Wisdom" are used to both explain and make sense of how all knowledge is dispersed around the world, rather than residing in one place or with one people.

This works because stories engage the audience in a way that facts alone cannot. There is no reason to mentally invest in facts; we want to know that what we learn will be of benefit in the future. We also remember stories better than we do facts or lessons alone. Those who compete in memory competitions[2] (yes, these exist) create 'memory palaces,' essentially adding characters and events to aid in memorizing things like the order of playing cards in a deck. Consider your own school days: do you remember the stories (e.g. what happened to you, books you read, what you heard) or the facts and data that you studied?

Storytelling is important for cases because what we write would not be cases without stories. Instead, we would provide packets of information (e.g. financial statements, profiles of target markets, timelines – which kind of tell a story themselves, but leave the narrative 'heavy lifting' to the reader). We tell the story of a protagonist and their decision. That is a character and a goal; characters trying to achieve goals equal a story. Therefore, if we as case researchers are going to write stories, we might as well do it as effectively as we can. The two of us would likely not write cases if they were not also stories, not only because of our pre-academic backgrounds (one of us studied journalism, the other film) but also because stories make things more interesting, for both writer and reader.

Of course, the craft of writing entails numerous challenges, as it involves not only generating ideas and overcoming writer's block, but also conveying the necessary message, in the fewest possible words, to ensure that readers remain engaged from beginning to end. The effort required to meet these conditions validates the assertion of the philosopher Blaise Pascal, who wrote in a letter in 1657: "I only made this one longer because I didn't have the time to make it shorter."[3]

Besides being relevant, clear, and concise, a writer is also expected to have a good writing style. This was highlighted during a doctoral defense committee for one of us, where the chair first thanked the author, not only for the content but for "making the dissertation a pleasant and engaging read." In fact, academic documents tend to be written in a very rigorous manner but are not necessarily enjoyable to read. An example of this was a renowned philosopher at a Spanish university who wrote an essay and then asked his assistant, "Is it understandable?" The assistant replied without hesitation, "Yes." To this, the scholar responded, "Then obscure it a bit."

The idea that cases are a form of storytelling is one that is important to us; why write an article about it otherwise? The idea that "a good story, well told" could improve an academic research manuscript may seem strange to most. We argue instead that it is essential not only to case research but any research, to best communicate ideas to the reader. In other words, it is our strong opinion that *cases that are more like stories are better cases*.

CASES AS UNFINISHED SCREENPLAYS

What unique contributions can a case method class offer a participant? Just as a film director tells a story to convince an audience of the value of buying a movie ticket, a case writer's audience consists of instructors and students, and the author must convince them of the value of using or reading the case. But what do we, as educators, want? It could simply be that students are required to read the case we wrote, only because it is mandatory. However, this might result in a passive and disinterested audience to whom we end up "lecturing" the case; they read it to be able to say they read it, but did not engage with it or get anything out of reading. Both of us have struggled (seemingly more so in recent years) with student preparation and contribution. One way, of many, to address this is to write and assign more engaging cases. As stated by a CRJ associate editor, a good case can transport the reader into an unfamiliar world. This might be a case like "Kidzania: Spreading Fun Around the World,"[4] that describes not only the company, but also the experience it provides to customers, in vivid detail.

Alternatively, we might find it more appealing to persuade other instructors to adopt the case, resulting in them obtaining it from a case distributor to examine and possibly teach. Yet, if the case doesn't convince them, it will be a one-time download.

Another approach is to create a case that leads to an exceptional classroom experience for students, which in turn makes other professors enjoy teaching the class, adopt the case, and use it in many programs recurrently, impacting thousands of students.

However, case authors are not really like film directors. They are more akin to scriptwriters who leave the work halfway done, so that the director, cinematographer, and dozens of actors can step in and participate in a scenario, completing the experience. Cases differ from plays or movies because they do not always have the same ending. When we write with the interactive experience of the classroom in mind, we aim for participants to feel it was worthwhile not only to have read the material (for those students who did), but also to regret not reading it (for those who did not), when they see the lively, challenging, and enriching discussion. In such discussions, students can play roles to become the hero or the villain, make decisions, take risks, and win or lose, without real-world consequences. This requires our audiences to be captivated by the characters, the problems, and challenges they face, and the potential learning they will gain from fully immersing themselves in their roles.

Several years ago, at a Global Colloquium on Participant-Centered Learning at Harvard Business School attended by one of us, one of the professors asked, with an intimidating tone and look, about the role of the professor in the case method: "am I a performer?" He then answered affirmatively, saying that indeed we are. However, we cannot deliver a great performance if the script we have does not allow us to give a stellar performance.

STORY STRUCTURE

Okay, let's go back to high school language class: the classic story structure known as the Freytag Pyramid (see **Appendix 1**).[5] We can see that the story begins with background exposition (discussed in a later section), and then something happens to spark the story – the inciting incident – which causes the action to rise.[6] This changes at the climax of the story, at which point action begins to fall,[7] followed by the resolution and denouement. Cases follow this same structure, with a few tweaks.

First, conventional case style (found not only in CRJ but also in cases published by Ivey, Harvard, and others), has the introduction take place at the same time as the conclusion, and then 'flashes back' to see how the company, protagonist, and decision got to this point. This is not unusual for storytelling, as many stories use a similar technique (examples include The Usual Suspects, Sunset Boulevard, and The Iliad). Note that for cases, this decision point is not at the resolution or denouement, but closer to the climax, as explained below. Second, cases tend to blend the opening exposition section with the rising action. This can be effective (we learn things as the events occur and tension rises) but can also be detrimental (a lot of information about characters as authors engage in an 'exposition dump,' i.e. three to five pages of company and industry background). Third, the decision point is not always at the same point in time or the same place on the pyramid. Case authors may choose to place the decision right after the climax (we know what needs to be done, but are unsure of the specific alternative or how to implement it)[8] or right before it (we have to figure out what the problem really is before knowing how to address it).[9] This will depend on whether the case is focused on diagnosis (we don't know what the problem is), decision-making (the problem is clear but the alternatives are not), or implementation (the alternatives are clear but we don't know how to evaluate and execute them).

Cases can also use the pyramid to develop the characters. By allowing the reader to discover the information/exposition through the eyes of the protagonist, we can

learn about the protagonist. Instead of just presenting the information, allow the protagonist to comment on it (through quotes) and connect it to the decision, which helps to maintain the narrative thread. Unfortunately, many case authors are erroneously taught that emotion and opinion have no place in a case. While it is true that an author's emotions and opinions do not belong (that would be editorializing the case), those of the protagonist and other characters elevate the story, making it more engaging and providing perspective. In other words, for students to see the world as the protagonist does, we must know about the protagonist. This can also provide learning opportunities, where students must separate fact from character opinion and determine what is entirely true and what is colored by someone's perspective. This is frequently done in books and movies, utilizing an 'unreliable narrator,' such as in Fight Club or Life of Pi, or where some kind of triangulation of the truth is needed, like in Rashomon.

In terms of case narrative structure, the key thing to remember is that the case data serves the story, and not the other way around. Why? Because the story is about the decision to be made, and the information in the case is only needed if it helps the student address that decision. Therefore, providing wide industry data or a detailed company history, none of which is used in the analysis, does not make for a more effective case. Most case writers have correctly learned (mostly from reviewers) that all the information needed for the analysis must be in the case. This also flows in the other direction: all (or most) information in the case should be relevant to the decision. What often occurs is that the narrative of the case disappears through several pages while the information dump occurs.

Case writers have a very useful resource for maintaining the narrative flow of their cases: exhibits and endnotes. If we want a smooth narrative where the reader doesn't get lost, it's essential to ensure that each section logically connects to the next. For example, it's common to find an author discussing the protagonist, their challenges, and pains, and suddenly, there's a series of sections filled with information describing processes and systems, a succession of historical events, office layouts, market data, definitions or explanations of concepts, or a deep explanation of some laws. On the last page, the protagonist suddenly reappears, wondering what to do and ending with a series of questions. After twelve pages of jumping between this kind of information, reading feels as enjoyable as reading the instruction manual of a kitchen appliance.

Solving this is not about avoiding relevant information, but rather presenting it in a way that doesn't break the narrative. Endnotes (if they are short and to the point)[10] are very useful for providing definitions or concepts, giving some context data, or quickly summarizing some figures. Exhibits allow for placing information that requires more space and provides clarity on things that are quickly referenced in the narrative (e.g. a CV, a job description, complete financial statements, a summary of the historical context, etc.), or that are better explained by simplifying them graphically (e.g. a pie chart showing market shares, a process diagram, a timeline, a table with a list of products and their descriptions, a map showing the distribution of stores in a locality, etc.). By placing such information in the exhibits, the focus can remain on the decision maker and the decision. Short cases do this very well, such as "Magformers LLC and Amazon: Dealing with Counterfeit Magnetic Toys."[11]

When teaching the case in the classroom, if the case is well-structured, it will be easier for participants to search for and find relevant data during the discussion. However, it is important to avoid spoon-feeding information to the students to the extent that it prevents them from making the intellectual effort necessary for their learning, as the goal is to strengthen their analytical skills. This goes back to the

placement of the decision, to ensure that the students are not only working on the right problem, but the right kind of problem (i.e. diagnosis, decision-making, or implementation).

CHARACTER DEVELOPMENT

We think that most would agree that in the books they read, the shows they see, and the movies they watch, characters are of the utmost importance. Star Wars would not be the same if we did not know a lot about Luke, Han, and Leia. Michael Lewis, author of Moneyball and The Big Short, tells the story of baseball analytics and the financial crisis of 2008 through the perspective of the people who were there, not just the events that happened. But as case writers, we often give our characters short shrift. We meet the protagonist in the introduction and often don't see them again until the conclusion. We know nothing about them other than name and title. Imagine Moby Dick if all we knew about Ahab was that he was the captain of a whaling ship.

We need to develop our characters. Movies do this several ways, one of which is known as "Save the Cat"[12] which shows the protagonist doing something good early in the story, to get the audience on their side. We also like to root for competent characters, so we will often see the protagonist succeed at something relatively minor (perhaps in how the proverbial cat is saved, but maybe just being an effective coworker or parent) to demonstrate competence. Contrast that with a typical case opening: the protagonist, head in hands, not knowing what to do. Not exactly a paragon of competence! Given the length constraints of cases, this can be more challenging in cases dealing with specific business problems (e.g. finance or strategy) compared to OB and ethics cases that usually address people-related issues. Nevertheless, it's not necessarily about spending a lot of space describing the decision-maker's profile or personality, but rather about understanding why the problem matters to them, what constraints they are facing, and what is at stake if they handle it well or poorly. "Pink, White, and Blue: A Transgender Sailor, the US Navy, and a Right vs. Right Ethical Dilemma,"[13] does this very effectively.

When teaching a session with cases written by someone else, this is even more important because we lack the necessary relevant context to understand the protagonist's decision-making process regarding the problem at hand. Not all readers of our cases share our cultural, social, or professional background, which necessitates providing contextual information to understand the pressures the protagonist faces. But even occupying the shoes of a protagonist is not optimal. We should strive to help the students see the world through the eyes of the protagonist, which requires information about motivations, thoughts, experiences, and character. Character information can be an excellent way to promote diversity, equity, and inclusion in cases.

Going back to our definition of story – characters trying to reach goals – we are not fulfilling our responsibility as authors if half of that equation, characters, are missing or underdeveloped. If the focus is on the position (e.g. CEO, marketing manager) rather than a fully developed person, engagement will be lower and the outcome will suffer. We, as case researchers, can sometimes get lost in the data and analysis of it all, and turn our cases into exercises. It is critical to remember what would be lost in such a transformation.

INCORPORATING EXPOSITION AND CASE DATA INTO THE STORY

Already exposition has been mentioned above, a few times, as a potential stumbling block to narrative flow. Because it is! Consider a movie like Aquaman. There are long stretches at the beginning of the story where background information is just heaped on the audience, awkwardly delivered as dialogue. In the musical theatre version of Les Misérables, the show program handed out to the audience, contained paragraphs of exposition so that actors didn't have to sing this information. In contrast, a story like The Hunger Games delivers a similar type of expository information, but through more clever means (the protagonist learns this as the audience does, allowing for understanding from her perspective; a propaganda video conveys important history while still showing the audience that the setting is a dystopia). As this shows, exposition doesn't have to be a dry data dump.

Tied to exposition, in case writing, is the idea of *editorializing*. All authors, including ourselves, struggle to present information without any author opinion or commentary (we have had to delete phrases like "an enormously successful company" or "a challenging situation" many times). We want our stories to be compelling and dramatic, and that can easily be accomplished through editorializing of this nature. To reconcile the need for interesting writing with the need to present facts objectively, consider presenting the information from a character's point of view. The protagonist could be learning or reviewing this content, a different character could be telling them the information, or the story could be told by the character, through quotes. If an opinion is presented, it should be clear from whose perspective this is. Any time you find editorializing in your work, ask 'according to whom?' If it is according to you, the author, remove it. If it is according to someone else (the decision-maker, another character, an expert), attribute it.

Related to this are quotes and dialogue. As a general rule, quotes are usually better than dialogue. Why? Because quotes are almost always informative, insightful, and most importantly, real. They sound real, they read like a thing a person actually said, and they are personal to that person. Dialogue, as a case storytelling device, is a fine idea but frequently fails in execution. Why? Because it does not always read as real; it must have been reconstructed by someone (e.g. the author, a contact at the company) based on memory. Dialogue generated from a recording of an actual meeting would sound much more real, but be much more difficult to include, than reconstructed dialogue (people in meetings do not speak in neat quotes and soundbites). One of us has reconstructed dialogue based on notes taken during a meeting,[14] leading to a better outcome, one that captured the protagonist's confusion afterwards (as opposed to, say, creating the dialogue based only on the protagonist's memory of the meeting). Phrases like "as you know," or "throughout our company's history" sound like something that someone wrote after the fact, not something someone said in a meeting.[15] If dialogue is not real, it's probably best not to use that expository format. Even so, it is also important to avoid including quotes that merely repeat what has already been stated in the previous paragraph as exposition; they should always add new information, which may be factual, emotional, or opinion based.

Bringing emotion into exposition is valuable and strengthens the character development already discussed. How does the decision-maker feel about the information you're describing? Is this an accomplishment they are proud of? Is it a situation they regret? This performs the dual role of telling the audience how to look at the information and also gives them a peek into the person's thinking. Even so, in

an attempt to give their protagonists real emotions, many authors resort to clichés that only lengthen the case, especially the introduction and conclusion, with clearly irrelevant details that neither seem nor are real. For example, "Joe looked out the window of his 8th-floor office, pacing back and forth with his hands on his head; he would only stop to take a sip of coffee while sighing, exhausted by overwhelming thoughts. He kept asking himself what he should do about problem X." These openings and closings often reveal our inability to create genuine empathy for the protagonist and truly immerse ourselves in their perspective.

Of course, we include the exposition and information because it is necessary to understand the case (understanding the context is as valid a reason for including data in a case as that data being used in the analysis). For instance, we recently examined a case about severe employee turnover in a pharmaceutical company in India, ostensibly due to salary problems, especially in certain regions of the country. The case included the company's financial information and HR reports on the causes of turnover. What was not clarified, however, were things like job definition, the tasks performed, the profile of the employees in these roles, their alternative employment opportunities, their salary level in comparison to the minimum wage or average wage in the country, the regional market condition differences, and so on. This omission makes it difficult for professors and participants from other regions or industries to clearly diagnose the problem or propose alternatives, compelling them to seek additional information from sources outside the case, which typically should be avoided.

Exhibits can often be the site of material that would fall into the category of "we have it, so we should use it." You shouldn't. Apply the same test as for any case information: is it used in the analysis? If not, why is it there? It's great that you can obtain a graph showing ten years of industry growth, but if the company is a minor player (e.g. < 1% market share) or the decision is tied to a disruptive change, that information is almost certainly irrelevant. Don't weigh down your case with material like that, even if, as mentioned above, it is made distinct from the narrative by placing it in the exhibits section. This, and the above points, all connect to the central idea of data in the service of story (and decision-making), not story in the service of data.[16]

CONCLUDING THE STORY

The part of the process where cases diverge most significantly from traditional stories has to do with the ending. Case authors truncate the story so that the students in the class can write the ending. Imagine if you went to see a production of Hamlet, or read The Da Vinci Code, and the story stopped at a certain point. You were then instructed to figure out what Prince of Denmark or Robert Langdon should do. This would likely be an unsatisfying experience (though perhaps an interesting one?), but this is exactly what we do with our students. Why? Because cases are not intended to entertain, but to provide an opportunity for learning by doing. A closer analogy would be a Choose-Your-Own-Adventure story, where the reader can select an alternative for how the story progresses, working through an individual (though predefined) path to an ending. Not exactly like a case (while cases can offer alternatives, they do not contain choices that lead to specific prewritten outcomes), but closer to one than a traditional book or movie.

Case authors first must decide where and when to end the story. Part of this has to do with the type of case (before or after the climax, as explained above). Part of this has to do with the tasks, concepts, theories, calculations, and considerations involved. The ending/decision point should make sense not only for the class, course, and

student, but for the story, which involves providing the appropriate information to write the ending, but also the right motivation and engagement. If a student is very engaged in the story, they will want to use the information provided to solve the problem. If students were presented with only data, with the barest element of story at the beginning and end (a glorified exercise, not a case), there is not only lower motivation and engagement, but less guidance and direction for how to use that data.

The story concept of foreshadowing can also be applied. Case writers should 'seed' ideas in the case to help direct the students. As an example, what makes a mystery thriller like The Usual Suspects compelling is that after the secret ending is revealed, viewers can consider what came before and see how they could have solved the mystery, had they known what to look for and how to combine that information. Contrast that with other classic mysteries, such as Sherlock Holmes stories, where figuring out the ending relies far more on esoterica and minute details; this can result in a feeling of dissatisfaction because it was near-impossible to put the clues together. It's a tricky balance because you don't want it to be too easy and obvious, but you want it to seem achievable, even if only in retrospect. Applying this in a case situation could entail the inclusion of information that is not clearly relevant, but does shed light, or a protagonist placing importance on an idea that may not immediately seem related. It could be as simple as including an exhibit (e.g. financial statements) that many students would ignore, but would cause top students to wonder why it was there and try to connect it to the other material (and example of this can be found in the case "Streetwise Mortgages: Growing More Efficient").[17]

Going back to Freytag's pyramid, the case decision is almost always near the climax. When we say that the students write the ending of the story, it does not mean that they say how everything works out (that would be the epilogue in the instructor's manual), but rather they decide how best to approach the resolution. What's the protagonist's best way forward to the battle at the end? Which plan puts the company in the strongest position to compete? In other words, the ending of the case should set up a decision where students can use everything that came before it to chart the protagonist's course, irrespective of the actual outcome.

STORY AND TEACHING GOALS

At its core, the case must be intrinsically linked to what the author aims to achieve when teaching it in class and the type of discussion they envision. This is why it is crucial to be clear about the learning objectives, as these indicate what information is relevant and what is not, regardless of how interesting it may be. It also helps maintain an "economy of language" and limits the number of pages required to tell the story.

Imagining how an instructor would want a particular part of the discussion to unfold can illuminate how the paragraph should be written. For example: Should it be a dialogue or a quote? Should it pose a question? Is the case meant to help students develop their ability to diagnose problems? Then perhaps the case should conceal or obscure relevant information, and have a few important details distributed in exhibits or footnotes. Should it introduce cold data, or should it be accompanied by the protagonist's opinion? Is there to be a role play in the class discussion? If so, students will need more insight into the protagonist and other characters, so they know about what they want, where they are coming from, and how they feel about the decision. Cases are written with a purpose – to be used in the classroom – so authors have a responsibility to consider that purpose when writing. We do this when writing the

instructor's manual (the format and structure demands it) but not often enough when writing the case.

This approach, in turn, suggests what relevant information is necessary to generate the desired debate, which elements or characters should be introduced, how to do so in a way that makes the suggested teaching plan feasible, and aligns the debate with the learning objectives. It is also essential to be clear about what information the decision-maker had available, and what was out of reach, at the time of the decision. Should certain information be omitted? Should it be introduced outside the narrative?

If learning objectives are to be achieved via the case as a pedagogical tool, is it appropriate to take dramatic license[18] to generate tension or emotional identification with the protagonist? The author might summarize events that only need to be briefly mentioned or bring in elements from the future that enrich the discussion (e.g. through the epilogue, even if they were not foreseen at the actual moment of decision, for discussion later in class).

There are cases (notably in OB and ethics, as these decisions tend to be tied much more to who the decision-maker is rather than only the position they occupy) where the protagonist is introduced with all their biases (starting from the case title), to create a situation where the class thinks as they would. There are also cases focused on a personal decision (e.g. "Susan Duffy: Leading Quietly")[19] where the decision is intrinsically tied to who the decision-maker is. These cases can, though, include elements or clues that contrast with character opinion; a top student can identify these to present a contrary position in the classroom (which only the more insightful students can discern in the text). Again, this depends on the learning objectives and the discussions that each author wants in their session; not suitable for all cases, but useful in some.

For example, in a case based on an old movie taught by one of us, Judgment at Nuremberg, a participant in the author's class expressed that she finished reading it feeling furious due to the insensitivity of certain case characters. Her strong emotions influenced her team discussion, creating tension as other members had different perspectives. However, in class, this contrast proved to be very useful and effective, but only if the author maintained a balance of emotions impartially throughout the narrative of the written case, without taking sides. The class session worked because students did not know how the discussion would develop until it concluded. The key questions for this author were "what do I want to teach," and "what do I want them to discuss during their pre-session teamwork," aligning with the direction of the upcoming class. Therefore the narrative, in this instance, should not only address the session's content but also its overarching themes. The author provided the class with the necessary elements to enable a balanced exploration of arguments both for and against the accused, prompting students to question whether conviction or acquittal was warranted.

We must remember that, as case researchers, we are neither historians nor biographers. Primarily, we are educators, aiming to create a document that serves as a tool to teach better business decision-making within a real scenario. This involves distilling a complex reality into a manageable format of a handful of pages to be effective as a pedagogical tool.

What can hinder the adoption of a case by other professors? A short answer would be "cases that seem difficult to envision as providing a good classroom experience." This can occur for several reasons:

1) The case appears too long or too boring and complex for the length typically allowed for a business case,[20] or when the teaching objectives are unclear or insufficiently defined, making the decision points ambiguous.
2) The case is too simplistic, making the decision or outcome so obvious that it's hard to imagine an 80-minute discussion on the topic.
3) The case is too unrealistic or based on such extraordinary circumstances that do not usually lead to recurring decisions (while these are useful for storytelling, less so for learning decision-making).
4) The case is too narrowly focused on one interpretation or just one possible answer.
5) The case has a narrative that is difficult to follow because it is confusing in its handling of time and sequence of events (a confusing timeline might be useful for a Christopher Nolan movie but not for students reading a case before class); simpler is usually better.

Sometimes this depends on the situation being described. Some decisions, frameworks, or concepts are just more suited to a lecture than a case discussion. In the marketing classes of one of us, when advanced quantitative analysis and metrics are discussed, the discussion of the narrative case pauses while some formulae and calculations are taught. Often, though, it can depend on how we narrate the situation and write the case. A good abstract and a well-written Instructor's Manual can generate initial interest in the case for those who will use it, but if the case narrative is not well told, it discourages its use (and re-use).

In summary, the session's storytelling is also illustrative and relevant because it should provide clarity on what students should bring when they enter the discussion and what emotional state you want them in when you pose the triggering question. And that is a key driver to determine how the case should be written.

END OF CASE, BEGINNING OF CLASS

As the classical philosophers say, "The end is the beginning of action."[21] Or in a more contemporary context, "we don't go to the garage and get into the car until we know the destination we'll set on Waze." Similarly, it's always useful to think about the class we intend to deliver when we write a case. What do I aim to teach? What decision do I hope they learn to confront? This aligns with the course in which we want to incorporate the case, the specific module, and the exact moment we plan to introduce it. Knowing this and having access to a real business situation that serves our purpose, the writing process comes alive when we encounter a challenging decision point that makes us think, "wow - it's fascinating to know how to make that decision!" That's when we know where the case should culminate (the decision point). Sometimes this only happens after a certain amount of thinking, reasoning, and structuring. Other times it happens during the interview with the protagonist (that 'aha' moment where we realize, "oh, so *this* is what the case is going to be about"). The rest of the process involves setting the stage for that decision, with the appropriate context to understand it, the concerns the decision-maker had while trying to find a solution to the problem, the data needed for analysis, the constraints faced, and the risks involved. However, all of this becomes clear when we know exactly where we want to end up. That's where the tension is.

Aha Moment: This is what the case is about

There is a case I wrote called "Snakes & Lattes: Playing the Marketing Strategy Game," published in CRJ, where I had been trying to get the company to work with me for a few years. As a marketing professor, this company interested me because it had basically invented a category of product: board game cafés. I finally was able to get in touch with the CEO, and we agreed to a face-to-face interview. The company was on the verge of large-scale growth and needed to make sense of its limited marketing communication activities, so I went into the interview expecting to talk about social media, e-mail marketing, and consistency of message. About halfway through the interview I was asking routine questions about target market and positioning when the 'aha moment' came. The CEO's response indicated that this company, which had been successful for about ten years, really had no clear conception about their fundamentals of marketing strategy. I thought to myself, in that moment, "oh, okay, this is what the case is about this, then." The tricky part ended up being getting the students to take the same journey I had (and that the company would need to have), and come to their own realization that the marketing communication issues could not be resolved until the target market and positioning was set. Seeding that data in the case in a non-obvious way was hard, but I'm happy with the end result.

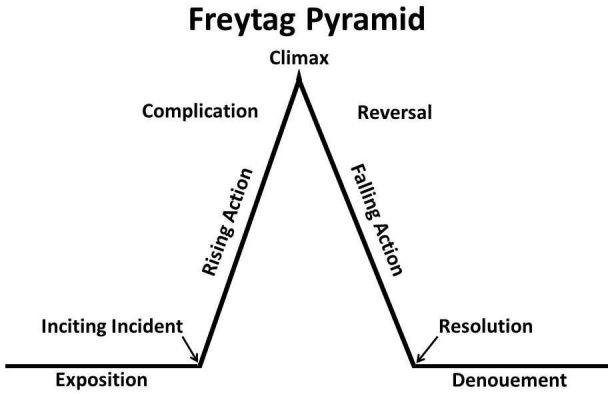
It is at that point where we capture the student's attention and encourage them to consider whether they should review the facts they've already read, cross-check scattered data, or perform certain calculations. It is at that point that, perhaps, the data from the case is considered in a new light, one that makes it clear how it should have been used for the decision and produces the student's own 'aha moment.' But, most importantly, it's where they should feel eager and excited for the upcoming class where that discussion will take place.

Aha Moment: Capturing Student Interest

I am an OB/HR professor. A few years ago I wrote a case about my dad when my mother passed away. I had been thinking about it for about two or three years already: how sad it is for a man to live, thinking about his glorious past with so much nostalgia, and feeling bad about the present. One afternoon I was looking for cases for one of our courses ("Designing your Life Project"). It is a course where many emotions are present, therefore we needed cases with which the participants could easily identify. The 'aha moment' came: I went to my desk and wrote a two-page case narrating the main character at 75 years old (semi-fictionalized; while this meant I couldn't get it published, I could still use it in my class). It was based on what I saw in my dad and his friends and other people from his generation. It took me less than one hour. Then I wrote his vision of life when he was 59 (another two pages) and the next morning I wrote what ended up being the first part, how he was living in his early 40s, still in the prime of life (that matches the age of my EMBA participants). I had found the perfect case for the "Life Project" module, written in three parts to be read in class! It has been a success because it feels so real: the case is about getting older, and how much fiction we tell ourselves when we are young and successful. That's all I wanted to teach in class: live 30 years in 80 minutes, to wrap up the EMBA program. Some of them end up calling or visiting their parents after the class! Less than 24 hours, not counting the two or three years of thinking about it beforehand.

Returning to the example of movies: It's like finishing watching Episode V of Star Wars (The Empire Strikes Back) or The Lord of the Rings: The Two Towers, both the middle entry in a trilogy, eagerly anticipating the day when we can see the conclusion. Again: our students are our audiences, and they should eagerly await the class that concludes with the fulfillment of the expectations that our cases are capable of generating.

Appendix 1: Freytag Pyramid



Source: Recreated by authors from Freytag's Technique of the Drama (Freytag, 1900)

NOTES

[1] Examples of research in this field include Gerrig, R.J. (1993) *Experiencing Narrative Worlds: On the Psychological Activities of Reading*, Yale University Press, New Haven; Barraza, J.A., Alexander, V., Beavin L.E., Terris, E.T., Zak, P.J. (2015) "The Heart of the Story: Peripheral Physiology During Narrative Exposure Predicts Charitable Giving," Biological Psychology; Montague, R. (2007), *Your Brain is (Almost) Perfect: How We Make Decisions,* Penguin Press, London, UK.

[2] Foer, Joshua (2011) *Moonwalking with Einstein*, Penguin Press, London, UK.

[3] Shapiro, Fred R., *The Yale Book of Quotations* (2006), p. 583. Yale University Press, New Haven

[4] Terech, Andres, Martha Rivera Pesquera, Guadalupe Torres (2018), "Kidzania : Spreading Fun Around the World," *Case Research Journal*, 38, 2.

[5] Freytag, Gustav (1900*), Freytag's Technique of the Drama, An Exposition of Dramatic Composition and Art by Dr. Gustav Freytag: An Authorized Translation from the Sixth German Edition* by Elias J. MacEwan, M.A., 3rd Edition, Scott, Foresman & Co, Chicago.

[6] Note: 'action' is less about 'excitement' or 'events' but is more in line with the concept of tension. Things become more and more tense up until the climax, because the protagonist is not succeeding, and is still figuring out what is going on and how to resolve it. Therefore, 'falling action' is not 'things are less exciting' but rather a reduction in tension, because the protagonist begins to succeed and determine what has to occur to resolve the problem. Consider a story like Harry Potter: in the middle of the story, Harry and his pals figure out that someone is trying to steal the Philosopher's Stone (this is the climax) and can then plan how to prevent this and execute the plan (falling action).

[7] Following on the previous note, the climax is not the 'big battle' of the story, but rather the turning point. The exciting clash at the end of the story is the resolution: the shark being killed in Jaws is the resolution, not the climax (this is a common

misconception, due to the translation, from German to English, to rising and falling 'action,' and leads to the model being taught incorrectly).

[8] As an example, see Juan M. Parra, Sylvia Rohlfer, and Pablo Alamo (2023) "'The Best' FIFA Football Awards 2019: Who is the Best Men's Coach in the World?" *Case Research Journal*, 43,1.

[9] As an example, see Eric Dolansky (2019) "Snakes & Lattes: Playing the Marketing Strategy Game," *Case Research Journal*, 39,1.

[10] Like this one.

[11] Palich, Leslie, Patricia M. Norman, Marlene M. Reed (2021), "Magformers LLC and Amazon: Dealing with Counterfeit Magnetic Toys," *Case Research Journal*, 41, 4.

[12] Snyder, Blake (2005) Save the Cat, Michael Wiese Productions, Studio City.

[13] Borja, Terry, Kathryn Aten, and Gail Thomas (2023), "Pink White, and Blue: A Transgender Sailor, the US Navy, and a Right vs. Right Ethical Dilemma," *Case Research Journal*, 43, 1.

[14] Parra, Juan M. and Cindy P. Pinzon (2020), "The Selection Process in JC Premium Cars: No More Candidates?" *Case Research Journal*, 40, 4.

[15] "As you know" implies a person telling another person something that both know. The only one who doesn't know it is the reader. So the two people quoted, both knowing this fact, would not tell each other that.

[16] Story in the service of data results in story in the introduction and conclusion, and no story in between, also known as a 'tacked-on decision.'

[17] Example: Mazaheri, Ebrahim & Eric Dolansky (2022), "Streetwise Mortgage: Growing More Efficient," *Case Research Journal*, 42, 3.

[18] Dramatic license differs from fiction or fictionalizing, which is not allowed in publishable case research. An example is including information in the case that was knowable by the protagonist even if it was not known (e.g. industry growth rates). Fictionalizing would be indicating that the protagonist knew it and was actively considering it in their decision. Dramatic license is including it in the case a fact about the industry but not claiming it was part of the decision-making process. This is a common storytelling challenge in cases based on secondary or archival sources, where it is completely unknown what the protagonist knows or does not know.

[19] Shapiro, Mary L., (2023), "Susan Duffy: Leading Quietly," *Case Research Journal*, 43, 2.

[20] Length is usually not about the number of pages, but how it seems when reading. A four-page case might be too long for the content, a 12-page case might read as too short. What matters is whether the content in the case is worthwhile.

[21] Aranguren, J. (2003), "Una defensa del exceso. Sobre el sentido antropologico de la actividad empresarial" *Revista Empresa y Humanismo*, 6, 2.