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NORTH AMERICAN CASE
RESEARCH ASSOCIATION

CRJ Conversation: Anne Lawrence

*Editor's Note: The following is a transcript of a conversation I had with Anne Lawrence, founder and chair of the Case Research Foundation. Anne is one of the most accomplished individuals in the case research community, having served as president of the North American Case Research Association and being awarded both the NACRA Fellow award and the Distinguished Contributor Award. Anne is a professor Emerita from San Jose State University and has published multiple cases in the Case Research Journal along with a textbook, *Business and Society*. Most of our conversation was about the Case Research Foundation and the Paul R. Lawrence Fellowships, which has provided an opportunity for a new generation of case researchers to benefit from Anne's wise and generous mentorship. This conversation was an honour for me and I think you will get a lot of value from it.*

Eric Dolansky: So, Anne Lawrence, thank you very much for joining me. Please tell Case Research Journal [CRJ] readers, who may be unfamiliar with it, about the Case Research Foundation [CRF] and particularly about the Paul R. Lawrence Fellowships. Why did you begin this organization and this program and what are its goals, and your goals through it?

Anne Lawrence: Thank you, Eric. It's a pleasure to speak with you. I'd like to answer that question with a story. My dad, Paul R. Lawrence, taught at the Harvard Business School for forty years. When I was growing up, the routine in my family was that my mother would cook dinner, and my father would clean up afterwards. When I was a kid, I liked to sit on a tall stool by the kitchen sink and listen to my dad tell stories after dinner. It was only quite a bit later that I realized that his stories were mostly just simplified versions of cases that he was writing or teaching in the classroom. I liked that routine so much that when I turned twelve, I told my parents that for my birthday party I wanted my dad to teach a case to me and some of my friends at the Harvard Business School. He quite gamely took over an empty classroom on a Saturday morning and took a bunch of twelve-year-old girls there and taught us a case. It was not a full-blown HBS case; it was a short case about a murder! I was very engaged with that, and perhaps not surprisingly, I went on to become a business school professor and a teacher and writer of cases. The whole birthday party episode was considered so extraordinary that the local newspaper wrote it up.

Eric: Really?

Anne: I still have the newspaper clipping. Another thing that was unusual about it was that at that time there were no women in the MBA program at Harvard. That birthday party was in May 1963, and women were first admitted into the masters' program that

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fall. So, in a way my dad was pioneering females at the Harvard Business School when he took us there! After my dad died in 2011, I contemplated what I could do to honour his professional legacy. I reflected on the fact that the two things he loved the most about his profession were writing and teaching with cases and working with young people. And I thought a fine way to honour him would be to set up a fellowship program to provide training in case research, writing, and teaching to early-career scholars. So, in 2014 I approached the NACRA board to obtain their support for this idea, and we founded the Case Research Foundation. Since then, the foundation has awarded 92 Paul R. Lawrence Fellowships. The Fellows have come to us from 26 countries and five continents.

Eric: Impressive! So, looking back, now that you've been awarding fellowships for ten years, did this function as expected right from the beginning, or were there some growing pains? Were there issues that needed to be addressed or was it a success from the get-go?

Anne: The fellowship program has definitely evolved over the ten years. One of the areas where we've seen a lot of change has been in our revenue model. I personally put up the initial funding to hire an attorney and set up the 501(c)3 nonprofit organization. I then wrote personal letters to every one of my father's former doctoral students – there were sixty of them – and explained what I was doing and asked them to contribute to the effort. I received quite an overwhelming response: they donated money, and many of them wrote me very moving personal letters about the impact that my dad had had on their careers. That was the second round of funding. We also set up a mechanism to enable individual donors to give to the foundation through our website. But we have since then moved to a more, I would say, institutional funding model. Most of our funding now comes from higher education publishers. We have sponsorships from Ivey Publishing, Emerald, SAGE Publishing, and more recently from the Open Access Teaching Case Journal.

Eric: I see.

Anne: Another area where I think we've seen a lot of evolution in our thinking is about how to make the experience more meaningful for our fellowship recipients. When we first started the program, we brought them to the NACRA conference and basically threw them into the deep end. We learned, over time, that it worked better if we paired them with mentors who interacted with the Fellows prior to the conference, to help orient them to what would happen there. We also found that if we asked them to write either a full-length case or a startup case for presentation at the conference, they got a lot more out of it. So, we now require all our fellowship recipients to write a startup or a full case to present at the conference.

Eric: Great. Everyone I've spoken to about the fellowships has determined this is a very successful program. Who and what do you credit for this success? What does success mean, to you, for a program like this?

Anne: You're very kind to compliment us on our success. Of course, it's been a result of many peoples' efforts. The Case Research Foundation has a fantastic board. We have a selection committee that picks the Fellows. We have many people mentoring

these young scholars at the conference, and we have other people train them, so there's quite a team working on this—all volunteers.

What does success mean? That's a good question. One way to think about it is in terms of the impact on the fellowship recipients themselves. The other way is the impact on NACRA and the case community more generally.

In terms of the impact on our fellowship recipients, the foundation is currently conducting a survey of the 82 people who have already gone through the experience, and we have some preliminary results: 100% of our former fellows currently use cases in their teaching and 75% report that since the conference they've published at least one case. They've published in a wide range of outlets, including the Case Research Journal, Emerald's Emerging Markets Case Journal, The Case Journal, The Journal of Case Research and Inquiry, and several others. We've received many glowing open-ended testimonials about the impact that this experience has had on them. Some called it transformative. One interesting detail that we learned from the survey was that the doctoral students who came through the fellowship program often commented on how valuable it was for them to learn about the instructor's manual. Because they are students, they had never seen one!

The other kind of impact is on NACRA itself as an organization, and the case research community more broadly. Here, I think the record has been more mixed. On the one hand, the fellowship program has brought many very talented individuals to NACRA, including one who became president of the organization, several track chairs, several members of the board, and certainly many active members. 58% of the survey respondents said that they had returned to NACRA at least once after receiving the fellowship. But we think there may be some bias in that data, because the individuals who responded to the survey are probably also the ones who are more likely to return to the conference; we think that the real percentage who come back is closer to 25%. Our observation is that the ones that do not come back tend to be the ones who have to travel the farthest. We get fewer returnees from Africa, Asia, Europe, and Latin America. On the other hand, the ones that do not return often become active in case organizations in their home nations or communities. So, in that sense, these Fellows have an indirect impact on NACRA by building its global reach and influence.

Eric: What do you wish you had known, when you began the program, that you now know? You've shared with me that you're stepping away from the program. What advice would you have for your successor or successors, whoever they may be?

Anne: Well, to speak first to my plans: yes, I do plan to step down from the role of chairperson of the Case Research Foundation at the end of this calendar year [2024]. I've run the foundation for ten years now. It has been my great privilege and pleasure to do this work. But I retired from my teaching job in 2017, and I am now winding down my other professional commitments to spend more time with my family and some creative projects I'm working on.

What do I wish I'd known? When we began this process, we expected that most of our applicants would come from the United States and Canada. After all, we are the North American Case Research Association. But that's not what happened. From the beginning, most of our applicants have come from outside North America, with the largest single group coming from India. Of our applicants from U.S. and Canadian universities, a significant number, probably the majority, are foreign nationals studying or working in North America. I have struggled to understand why we don't get more interest from young scholars who are U.S. or Canadian citizens. My best guess is that

this pattern reflects the norms of many collegiate colleges of business in North America. I would describe this as a disdain for qualitative research, and what I see as a misplaced emphasis on quantitative research that apes the methods of the natural sciences. Individuals that have come up through non-North American institutions have not absorbed this bias against qualitative and field-based research.

Eric: What would you say is the biggest challenge that the fellowship program has had? This could be a short-term or longer-term challenge. How did you overcome it? Are you still working towards overcoming it?

Anne: Well, my answer to this question reflects my answer to the last question. I believe NACRA is an outstanding professional association. Its journal, the Case Research Journal, is an outstanding journal. But NACRA and the Case Research Journal have struggled to achieve legitimacy. We are operating in an academic culture that is obsessed with the quantitative testing of hypotheses. It appalls me that the Case Research Journal has not been included on a number of the lists that universities use to rank academic publications. When many of our Fellows come to NACRA, they tell us they love the conference. They love cases, they love teaching with cases, and they love field work. They're very excited about their experience at the conference. Then they go back to their home institutions, and their deans and their department chairs tell them not to waste their time. I think it's a big systemic problem. It's beyond the capabilities of the foundation to solve. It's a task for NACRA and for our allies in the case research community globally.

Eric: I agree 100%, and in my role as editor I've been travelling around giving talks, and a big theme that I've been giving is that cases are research. Part of the issue with that is where I am invited to give that talk are those organizations that already see value in cases; there is an element of preaching to the choir. Now, preaching to the choir can be useful if the choir will go out then and proselytize in their home departments or schools.

Anne: Yes.

Eric: I also think one thing that could effect a change is the AACSB perspective on the scholarship of cases, which is encouraging to see. But there exists an entrenched attitude.

Anne: I think that's why some of our Fellows don't come back, even though they had a great experience. They're pressured not to, or they aren't funded by their institutions to do this kind of work.

Eric: Agreed. Can you provide examples of the success stories that you're most proud of?

Anne: Well, I think our greatest successes have been our alumni, so I would like to talk about some individuals. I'll mention just three, whom I've been very grateful to mentor and work with. Michael Goldman, a scholar of sports marketing who went through the fellowship program in our first year, went on to become President of NACRA and a leader in the case research community. Maria Ballesteros-Sola is now, in my view, one of the leading case writers in the field of social entrepreneurship globally. Anjan Ghosh

established the Silk Road Case Center in Kazakhstan to develop cases about organizations in Central Asia and has won awards for his case research-based theory-building. All three are making outstanding contributions to case research. There are of course many others.

Eric: What advice would you give to someone who's new to case research and who might apply for the fellowship?

Anne: We receive many applications. This fellowship is very competitive: we typically take about 15% of our applicants. So, who do we take? Well, we receive a lot of applications that I would call “aspirational.” Their essay goes something like this: “I’ve always been really interested in case research and writing, and I’m very eager to learn more about it.” We tend not to admit these applicants, even if they have otherwise stellar records. We’re looking for people who have demonstrated that they’re already trying to do case research, and we are favourably inclined towards individuals who have written a case (even if only for their own classroom use), that have attended seminars or other training, and/or who have apprenticed themselves to a professor who is an accomplished writer of cases. My advice to applicants would be to explain exactly how you’ve already demonstrated your commitment to case research. We also set a higher bar, of course, for faculty compared with doctoral students. Of those we accept, typically half are doctoral students and half are early-career faculty members (in the first three years of a tenure track appointment).

Eric: When you meet with the Fellows at the conference, I know you spend several hours together over the course of the few days. What advice do you give them, and how has this changed over the ten years that the program has been active?

Anne: The program for the Fellows begins Thursday morning with what we think of as a boot camp introduction to case writing. We break it into two parts: one about the case and the other about the instructor’s manual. After that, we pair them with their mentors and put them into the regular conference tracks. The Fellows present their own startup or full-length case, and then we meet with them again at the end of the conference for a debrief.

As for advice, the main advice I’ve tried to give fellowship recipients is to find their own voice in their writing. Try to create cases that will light up their own classrooms. I often share a story about an experience I had when I was invited to the University of Cape Coast in Ghana for a week to train their faculty in case teaching and writing. I met a faculty member there who told me that he had used a Harvard Business School case about a pizza company. He said, “my students don’t eat pizza. They don’t even know what a pizza is. What I needed was a case about fufu.” Well, when I was in Ghana, I learned that fufu is a staple of the West African diet—it’s the equivalent of what pizza is for Americans. I often relate this story to the fellowship recipients we train. I ask them: What’s your fufu? Write a case about that. We have fellowship recipients coming from all over the world. They need to write cases that will engage and inspire students in their own cultures.

Eric: In terms of the Case Research Foundation, you’ve built a not-for-profit organizational framework. You mentioned you brought in an attorney at the beginning to make sure that all the paperwork was taken care of, and in conversations we’ve had at the NACRA executive committee, you have explained that this framework could be

used not only for fellowship programs like the Paul R. Lawrence Fellowship, but for any program that could benefit the aims and goals of the larger organization. What's your wish list of programs? What would you like to see this grow into? What could be offered in the case research community through this framework?

Anne: I would be very gratified if the Paul R. Lawrence Fellowship program continued after I retire. However, the Case Research Foundation has a very broad mandate: to promote awareness, development, and dissemination of case research, writing and teaching through provision of scholarships and grants, and through other charitable and educational activities. This mandate would be compatible not only with continuation of the Paul R. Lawrence Fellowship program, but also with any number of other possible initiatives that NACRA might wish to undertake. For example, it might want to set up a scholarship or grant program to train mid-career faculty, individuals who have attained tenure and are interested in exploring different kinds of research or teaching approaches. There's a broad range of possible initiatives that could be undertaken under the auspices of the foundation. That will be up to its new leadership.

Eric: So we talked a little bit about qualitative and field research and the value of that in scholarship. In your opinion, how does case research make an impact? Impact means different things to different people. There's a lot of discussion out there right now about impact, and impact for practitioners vs. impact for communities vs. for students. AACSB is very interested in impact. So where do cases fit into this, in your opinion?

Anne: Well, I think cases have two main kinds of impact. One is on student learning. Those of us in the case community understand that students learn best when they actively engage in creative problem solving. We know that students remember what they learn from a case discussion better than what they learn from many other kinds of classroom experiences. But the second one I would mention is the impact on research and particularly on theory building. I'd like to illustrate that with another story about my dad.

Eric: Please.

Anne: My dad was well known for his contributions to organization theory. One of his best-known books was *Organization and Environment*, in which he proposed what became known as contingency theory. I would describe this, in a nutshell, as the idea that “there's no one best way to organize; it depends on the environment.” Management scholars remember this as a theoretical concept or framework. But if you read the book, you can see that the theory is entirely built from a series of case studies in four different industries. The theory itself flowed upwards from the field work that my dad and his co-author Jay W. Lorsch did. He told me many times that his theoretical ideas did not start with a hypothesis derived from other theory; they started with a real problem that real managers were trying to solve. He referred to his work as “problem-focused research.” He told me that although he's often thought of as a theorist, he could not have developed his theories without his case research and case writing. In that sense, I think he's a role model for using case research as a powerful source for the generation of theoretical concepts.

Eric: So then the next question, which is a very big question, is how do we accomplish that? Looking over your time leading not only the Case Research Foundation, but also your involvement with NACRA, your involvement with CRJ as a board member and reviewer, as well as your involvement in the wider case research community: what is the road ahead? How do we convince non-case researchers to see the value in this? What can organizations like the Case Research Foundation or NACRA do to navigate any potential coming changes in research, pedagogy, and technology? This is admittedly a huge question, and I understand no one has the answers, but I would like to know your thoughts on what is the best way forward to have deans, colleagues and journal list-makers see the value and the impact that case research can have.

Anne: Honestly, Eric, I don't think I'm the best person to answer this question. I think a lot of the coming changes in both the writing and teaching of cases are going come from new technologies, particularly artificial intelligence. Much of our teaching has now pivoted to online platforms, and a lot of case discussions are taking place in asynchronous chat rooms. I've always liked engaging with students face-to-face in a real classroom. I'm glad I retired when I did and did not have to live through this transition.

Eric: Yes, I also like engaging with students in a face-to-face classroom, and I am unfortunately not near retirement yet.

Anne: Yeah.

Eric: It's sometimes a bit of an uphill battle, but to delve a little bit deeper: when I was first learning cases, I went to Ivey for my MBA. All my classes were case classes, and I had some very well-known case faculty, like Jim Erskine, while there. He talked about the idea that in the future [well, the future compared with 2002] schools will have to give students a reason why we all have to gather in one place as opposed to doing everything online. This was some time ago, and there's some prescience there on his part. Cases provide a reason why we should all meet in one place.

Anne: That's a great idea.

Eric: Having lived through COVID, which abruptly forced changing to online asynchronous and synchronous case discussions, and seeing the value these can offer and the value these can't offer: do you see cases as a motivation for faculty and students to continue to gather in person?

Anne: I did not live through COVID in the classroom because I retired from the classroom pre-COVID. I do think that in the future we're going to continue to see a hybrid mode of education where some classes are online, and some are in person. And cases would be a very good candidate for the in-person part of our higher education programs.

Eric: In terms of convincing people, promoting case research in a general sense is a goal of the Case Research Foundation. What are some other ways that you could suggest for individuals in their own schools to promote case research, to legitimize case research as impactful research that should count towards things like tenure and promotion?

Anne: At my own institution, San Jose State University, I gave case writing and teaching workshops. I cowrote cases with my colleagues. I also invited others to sit in on my classes to see for themselves how powerful that case discussion can be for students. I was also able to model for other faculty how to use case research and teaching to build their professional dossiers.

In terms of building legitimacy, I think NACRA needs to be quite strategic about what kinds of institutions are most likely to be receptive to what we're offering. My observation is that we are most likely to draw members not from the R1 [research-focused] institutions, which tend to solely reward quantitative research, and not from community colleges, which tend not to require research at all, but from the institutions in the middle tier. My own institution is a good example. It is a large, publicly-funded state university which values both excellence in teaching and peer-reviewed research. Case research has something to offer faculty at these institutions, because it gives them a way to demonstrate excellence in both areas.

Eric: I agree with that, and one thing to elaborate on – what you said in terms of giving workshops or allowing colleagues to come into your classroom – I think there are misconceptions of what case research is. I think that a lot of academics still believe that people who write cases just go into their office, make up a story, and type it out. They don't understand that not only is it research based on fact, but also that there's a whole other document, the instructor's manual, which is for a different audience and has a different structure, and involves theory through application. I think education could help those who are receptive in the first place.

Anne: Yes, I agree.

Eric: And, therefore, my last question: you are a NACRA Fellow, you are a NACRA Distinguished Contributor, which is, for those of our readers who don't know, an honour very rarely bestowed. You are a role model for many people at NACRA. In the case community there are a lot of people who contribute to NACRA in different ways, at the conference, at the journal, or within the organisation. How can someone take their contribution from a good level, say, as a conference track chair or board member, and take it to a great level like that of a NACRA Fellow or a Distinguished Contributor?

Anne: Figure out what you're good at and do that. Find your own story. Find your own voice. For me, I would say that I have realized that giving back, in the sense paying forward my debt to my own father, can be profoundly rewarding.