

A Word from the Editor ...

Quotations as Primary Data: Capturing Case Voices

As case researchers, we try to capture the essential characteristics of both the problems in the organizations we write about and the people who own the problems. Students need data about these people if they are to understand the pressures and the politics that often influence decision-making in the real world. Learning and lively discussion in the classroom follow when students can put themselves in the decision-maker's shoes, when they can play the role of case characters, and when they can feel the tensions and fears of the people involved. But in order to step into those shoes, students need to know what size they are and what kind of person was wearing them in the real world. Are they high-top sneakers or imported leather pumps? Wing-tip brogues or low-heeled oxfords? Is their owner a red-necked bull-of-the-woods, or a naive recently hired idealist? Students need to know, if they are to understand the roles they try to play or the complexities of the problems that have to be solved.

Case writers have two basic tools for conveying information about people. We can *describe* what we see and hear and experience, or we can *duplicate* it. "Description" casts the case writer as a storyteller or reporter, giving secondary or processed data to the students. "Duplication" removes or masks the case writer's presence, giving first-hand primary data to the students. Typically, both tools are needed to present a full picture. Often, however, writers omit the primary data that can make students feel they know the characters and are there on the spot as decisions are taken. Such data include documents (including memos, letters, directives, and policies) that people were looking at and direct quotations that convey what people were seeing and feeling and saying at the time.

When case writers use the word "that" to summarize or interpret what people in the organization said, they are *describing* the data. When they say, "the CEO said that..." or "Jane Johnson reported that..." or "managers were afraid that..." or "salespeople felt that..." researchers are filtering the data through their own perceptions, and readers have no choice but **to** accept the writer's judgment. But when we *duplicate* the data, by quoting the words of the CEO or Jane Johnson or a manager or a salesperson, then students have a chance to experience the data for themselves. They can draw their own inferences from what they hear. Direct quotations from case characters convey information about the people speaking as well as the events they speak about.

Often, *Case Research Journal* reviewers ask authors to provide quotations from case actors. Researchers who used tape recorders or took extensive field notes can reconstruct what the case people said with relative ease. Those who relied on memory or secondary sources for case data have a different problem: they may have to contact the case organization for supplementary interview data. Telephone conversations can sometimes suffice, but face-to-face interviews provide a far better source of material. They are more likely to provide the figures of speech, metaphors, and examples that bring color and life to the character in the case.

It is not necessary to quote people precisely; indeed, it is often necessary to edit their words extensively in order to capture the essence of their meaning and flavor in presentable English. Most of us ramble on in our conversational exchanges, trusting our listeners to patch together complete sentences and paragraphs from our fragmented thoughts. As listeners, most of us integrate what we hear unconsciously, not noticing grammatical lapses and tangential dead ends. As readers, though—when reading a transcribed interview, for example—we do not forgive such syntactical transgressions. Case authors are responsible for presenting quoted data as the speaker meant it to be understood.

The field research process protects case researchers against misrepresenting or warping the content of quoted data. Normal precautions include confirming with each case manager that any quoted passages accurately reflect what that manager said or would have said about the issue. When a manager says, “no, I wouldn’t have said that,” the case writer has the perfect opening to respond, “what *would* you have said, at that time?” The resulting conversation produces direct data for the case, whether or not the author’s first effort to construct a quote meets with the manager’s approval.

The manager’s confirmation of quoted data protects against misunderstanding or bias on the part of the researcher. At the same time, the researcher’s questioning, based on an outside point of view and a recognition of the organization’s problems, should guard against managers’ natural tendency to recall things in a too favorable light. Given this process for confirmation of data, it is quite permissible for researchers to construct quotations to represent what a case actor thought or said at the time of the case events. When case authors sign the Journal’s “Author Affirmations” form before final acceptance of the case, they certify that the organization has approved those quotations as part of the “data gathered with understandings of confidentiality.”

Some case writers attempt to fabricate dialogue or conversations between case characters. Very few of us, however, are skilled playwrights or screenwriters. The conversations we attempt to portray may pass the test of acceptance by the involved managers, but they usually seem stilted, unnatural, and strange. They often detract from the sense of reality that is the essence of an outstanding case.

Good case data begins with direct observation and recording, but it does not end there. We must temper the raw recorded data with our observations of the context in which the words were spoken. As case writers, we must describe what we see, hear, and feel at the case site. But to bring life to the finished product and energy to the classroom, we should also duplicate some of the key data so that students might share in the process of discovering its underlying implications.