

A Word from the Editor ...

## Access: The Case Starts Here

A teaching case is, above all else, the story of a problem. It documents the situation of some real-world decision-maker, inviting our students to define appropriate problems and invent solutions that can be implemented.

Potential sites abound. Employers of our graduate students, students in Executive MBA programs, consulting clients, party acquaintances, friends and relatives, other faculty members or administrators—all are contacts that may lead to productive case research. Newspapers and the business press also provide stories about specific problems of the day, but these reports are harder to convert into good case material.

Access to a case site is usually by invitation, in response to a direct request by the researcher. We suggest that the request itself will have a strong influence on the quality of any resulting case. Asking for permission to write a case about the organization can lead to cases that lack the problem focus our students need, or to cases that (if they do describe problems) can't be released by management. On the other hand, asking for permission to write about problems the organization has recently faced can focus manager's attention on the likely outcome. Release of the case is much easier when the managers expect to deal with problems.

Writers often invest substantial library research in a case, recounting the history of the firm and relying on magazines or annual reports for quotations from the CEO. Many of the cases rejected by the Case Research Journal fit this "case history" model. Their authors know enough about the organization to gain entry for field research, but efforts to reach insiders fail. Authors wind up at the Public Affairs department, where employees are trained to minimize problems, not to disclose them.

Persistent writers may convince PR to introduce them to line managers, or may find their own contacts, but "cold calling" for access is difficult for some people. The line is simple enough, after introducing yourself and establishing your university affiliation: "Hello, I'm writing a business school case about your company and it looks as though you have some fascinating problems that would make a powerful classroom case. Can we get together? Do you have a couple of minutes to talk? Is this a convenient time?"

A positive response to that question—or even an expression of curiosity—can open the door to the researcher's explaining about confidentiality, clearance and release, and the need to include conflicting points of view from the people in the organization. An exciting case about a significant problem may appear in many textbooks and be studied by thousands of students, reflecting great credit on the people who faced that problem in the real world.

Access means gaining the confidence of the organization's people so they can speak honestly and know the researcher will confirm any direct quotations with them and will clear the finished product with higher management before the case is used in public. Real access comes when the

case writer finds a likely company and asks, “Do you have any interesting problems, that business (or marketing, or finance, or HRM, or...) students could learn from?”

Nearly all managers have problems. (Those without problems to solve have been “downsized” out of most of our major corporations.) Most managers, once they believe the writer’s assurance of confidentiality, are willing to talk about their problems. Finding these managers requires persistence, initiative, creativity, and sometimes courage. Those are qualities that mark good field researchers and lead to the publication of outstanding classroom cases.