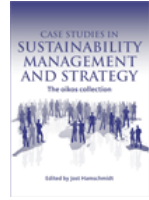




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# 1.2

## Cases in Corporate Sustainability

### What Makes an Excellent Case?

The case method of teaching was developed by Faculty of the Harvard Business School<sup>1</sup> and the Ivey School of Business in the 1920s. The basic idea was to simulate real business challenges in the classroom in order to breathe life and instill greater meaning into the lessons of management education. Case studies can be important tools for creating learning processes on different levels—students are forced to struggle with exactly the kinds of decisions and dilemmas managers confront every day. In this reflection of reality, the values and goals of the student are systematically challenged. Uncertainty is key: students are asked what *they* think, how *they* would act, and what challenges *they* feel are important. The use of a case study should create a classroom in which students succeed by exercising the skills of leadership and teamwork in the face of real problems. Facts, figures and theories play an important role; but contexts, emotions and value judgments have a large influence, too. Guided by a faculty member, students cooperate, analyze and synthesize conflicting data and points of view. The objective is to define and prioritize goals, to persuade and inspire others who think differently, to make tough decisions with uncertain information, and to seize opportunities in the face of doubt.

These attributes are especially valuable in the context of sustainability and strategy; organizations are now continually forced to value the different aspects of sustainability and their interrelations: How do social issues impact the economic bottom line? How can an environmentally sound strategy create a positive impact on employee motivation and thus have measurable impact on economic performance? What comes first and why? These are just some of the many questions that may arise.

1 This introductory paragraph is based on information available at <http://www.hbs.edu/case> and McNair and Hersum 1954.

What makes an excellent case in sustainability management? There are multiple case “recipes” available, e.g. via the Internet, and a vast literature about case writing and teaching.<sup>2</sup> Many of these tips and hints can be applied to sustainability cases. In this section we propose ten features of an excellent case, which are derived from experience with the oikos Case Writing Competition. They also echo the lessons of a classic article by Clyde Freeman Herreid.<sup>3</sup>

1. **An excellent case provides a learning opportunity on a relevant topic.** The case should tackle a decision situation with impact on the future of an organization and implications for corporate strategy. It should be a real case, not just a story. And it should identify clear-cut management decisions (i.e. merge or not; compete or cooperate).
2. **An excellent case tells an engaging story.** It should have an interesting plot that relates to the experiences of the target audience. It needs a hero, a dilemma and a solution. The solution may not exist yet; it will be what the students need to supply once the case is discussed.
3. **An excellent case is accompanied by teaching goals and a teaching note.** It should be explicit which audience is being addressed with the case. Undergraduates have a different background compared to MBA students. What does the case do for the course and the student? What theories are employed? How should the students be involved (e.g. group works, student preparation, class interaction). Cases can be choreographed with role-plays and/or voting. Students need to be systematically challenged to argue. Excellent cases provide suggestions for frameworks and literature for faculty *and* students.
4. **An excellent case is based on a recent situation.** To appear real the story should have the trappings of a current challenge. If a student has just seen the problem mentioned in the media, so much the better. Thus, a case on corporate strategies to deal with climate change will arouse the students’ interest more than one on Shell’s Brent Spar Platform disposal challenge.
5. **An excellent case includes quotations.** Digital technology has made the life of case writers easier; nowadays it has become simple to produce a short film on the “hero” of a case. A face and a voice is the best way to gain empathy for the leading characters: let them speak in their own voices. If this is not possible, use quotations and add life and drama to the case. Quotations from other sources, e.g. leading newspapers, advertisements or internal documents, should be used as well. They make your case more authentic.
6. **An excellent case is relevant to the audience.** Cases should be chosen that involve situations that the students know or are likely to face. This improves the empathy factor and makes the case clearly something worth studying. Thus, for a graduate student in finance, a case involving George Soros’s opinion on Tobin taxes might be of greater interest than barter trade in Papua New Guinea.

2 See e.g. Heath 2006; Leenders *et al.* 2001.

3 Herreid 1997.

7. **An excellent case is conflict-provoking.** It should provide food for thought and should leave room for different interpretations. It should fuel the debate on an issue. Take, for example, the Hindustan Lever case in this book (pp. 146-163): Is it really sustainable?
8. **An excellent case is decision-forcing.** Not all cases have to be dilemmas that need to be solved, but there must be an urgency and a seriousness in such cases. Best-practice cases are often boring for the reader whereas, in dilemma or decision cases, students are forced to face challenges head-on. Provide a time-line and sufficient data in order to enable well-reasoned options.
9. **An excellent case has generality.** Cases should be of more use than addressing a minor or local problem; they should have general applicability. The case writer should make sure that the case provides useful generalizations and clear take-aways. Patterns should be recognizable and key insights should be aimed for—for on-the-job application or for confidence in mastering similar challenges in the future. (Take, for example, the Body Shop case in this book [pp. 228-253]: what are the implications for other takeovers?)
9. **An excellent case is as short as possible.** This is basically a matter of attention span. Cases should be long enough to introduce the facts of the case but they should be carefully designed in order to keep interest high. Complexity can be introduced in stages. Case series can help in structuring the information. Data can be provided accompanied by some questions and a first decision point before additional information is introduced. Remember that the average person is not able to digest more than three pieces of information at a time. (Take, for example, the Mobility case in this book [pp. 254-278]: why is it structured as it is?)
10. **Finally: an excellent case is one that is revised after a first try in class.** Very often case writers take implicit knowledge for granted and the perception of the case presented in class is different from what was expected. Different mental models and understandings of the foundations of management might also hinder the applicability of cases in different geographical and cultural contexts. This is a growing challenge in a world economy, where regional contexts are often key to understanding markets and society in order to guarantee long-term business success.<sup>4</sup> At the same time, this represents a great opportunity, since an explicit description of business models and dilemmas in a specific context does contribute to a better understanding of cultural foundations and underlying values of the environments in which businesses are operating.

4 See e.g. Friedman 2001.