Chapter 4

Case Study Methodology:
An Analysis of Effective Methods in Business Cases

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ABSTRACT

This chapter provides an overview of case study methodology and its applications in writing case studies. The reader is introduced to the specific procedures that are implemented when developing a case study for educational purposes. The methodology discussed here is comprised of three parts: secondary data analysis (external and internal sources), qualitative data collection and analysis (e.g., in-depth interviews and observation technique), and quantitative data collection and analysis (e.g., surveys and questionnaires). After describing each method, the authors provide specific examples from published business cases to cement reader's understanding of how to successfully develop that method.

INTRODUCTION

Case study methodology refers to a type of research inquiry in which multiple sources of evidence are used to draw relevant conclusions (Yin, 2009). Case studies are used to address complex problems, and often focus on a decision-making scenario within a real-world context. In order to provide the reader with the information they would need to develop actionable insights, case writers need to perform complete,

multi-dimensional analyses of relevant available data. The methodologies which have developed to support this type of analysis complement one another to form a multi-dimensional study. An effective case study is one that not only tells a story to create an emotional connection with readers, but also presents a complete analysis of available data to provide intellectual justification (Flyvbjerg, 2006). The selection of data sources and methods is driven by the goals of the case writer. For example, if a study is centered on developing a stronger social media presence for a large brand, the focus would be on finding information about digital marketing channels and competitors' marketing strategies. In a study with a goal of identifying a best strategy for succession planning within a small business, the focus would be shifted instead to management structure and long-term operating decisions. This chapter will highlight not only the difficulty of identifying relevant data required for an effective analysis, but the importance of ensuring accurate and unbiased results.

Learning Objectives

- Understand the unique qualities of research methods that pertain to writing an educational case study
- Summarize the different approaches and techniques of case study methodology with specific reference to educational applications
- Explain the differences between internal and external data sources as they relate to secondary data analysis
- Recognize contributions made by in-depth interviews of customers, employees, and external experts to build a solid, teachable case study.
- Recognize contributions of quantitative research methods in adding more precision of analysis to the educational case study

BACKGROUND

In case research, information sources can be primarily divided into two categories: internal sources and external sources. Internal sources provide information which is collected from internal databases or directly from the research subject (Crawford, 1997). When a business is the subject of a study, these sources can include the company's financial documents, marketing plans, list of customers, and procurement documents, as well as in-depth interviews with lower- and higher-level employees. Internal data sources present researchers with intangible information that might otherwise go unnoticed; such as management style and company culture. In-depth

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