

**RESEARCH BASED CASES:  
A TOOL FOR CURRENCY, CREATIVITY, INFORMATION  
SEARCH, AND VALUE IN MARKETING EDUCATION**

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**ABSTRACT**

Today's business environment has amplified many of the problems inherent in the traditional case study method. Product life cycles are becoming progressively faster, and the business environment is changing at such a pace that it is no longer reasonable to believe that a retrospective analysis of past events will yield insights that are applicable to students' future managerial experiences. "Solutions" to textbook cases are now readily available on the Internet. At the same time, students have unprecedented access to secondary information from library databases. This provides an opportunity to depart from the model where it is assumed that all the information needed to make appropriate decisions on a marketing problem can be found in a provided twenty-five page document. Research based cases—cases built on the situation or a "target" firm mentioned in a popular business or trade periodical—allow the student determine the priority of information needs and to pursue up-to-date information based on research needs identified. Benefits and challenges of this approach are discussed, and it is compared to traditional cases, simulation, and "live" consulting cases.

**INTRODUCTION**

The case study method has long been a staple of American—and, more recently—international business schools (Jennings 2002). Although an emphasis on case studies has been subject to criticism on a variety of fronts (Rippin et. al. 2002), this approach to business education has served as a sort of "reality check" which arguably helps assure, at least to some extent, that business schools address issues that are applicable to real world firms. Although the writing of cases may be done with certain pedagogical objectives in mind and a subsequent revision of actual data (Rippin et. al. 2002), real world cases introduce some of the complexities and questions of priority that are less likely to be emphasized in the academic's more "sanitized" models.

Several realities of today's business and educational worlds have amplified problems that are common to traditional cases. As the speed of product lifecycles has increased dramatically over the last two decades,

obsolescence of cases poses a more serious threat to their applicability to the business settings that students will face in the future. It can no longer be readily assumed that events that took place in the past still reflect the same types of phenomena and involve the same types of analytical issues that are relevant today. Advances in information technology pose two separate challenges to traditional cases. First, examples of "ideal" solutions—often based on the hindsight of a class discussion—are likely to abound on the Internet, both for a fee from "paper mills" or free in the forms of papers and notes posted by past students. Secondly, technological advances have made an increasing amount of information available to students. It is absurd to imagine a manager being handed a twenty-five page document containing all the information needed to make relevant decisions and, quite possibly, even the questions that should be addressed. Instead, managers today will need to face choices with respect to the priority of issues for research and critical judgment about the credibility of data available. Unlike information presented in cases, external sources of information vary in their credibility and currency.

Research based cases—using articles from the popular business and trade press as the "setting" for a case study—preserve some of the strengths of traditional cases while potentially alleviating some of the problems discussed above. I have used this method—both at the graduate and undergraduate levels—in international marketing, consumer behavior, and marketing channels courses. In this paper, I discuss opportunities for assigning research based cases and analyze some inherent strengths and weaknesses. I suggest that, even in keeping with the limitations of this approach, its use may contribute substantial "marginal utility" as a novel approach in the business education environment that tends to emphasize other methods. Limitations of the research based case model are also acknowledged.

**THE RESEARCH BASED CASE**

A research based case involves the assignment of an article from the current popular or trade press for case analysis. Since articles often address situations

facing several firms, one firm is chosen as the “target” firm—the firm that has hired the student as a consultant to provide research, analysis, and advice. It is important to make it clear that they are doing this case *for*—not “on”—the firm in question. To emphasize this distinction, I have often found it useful to name the assignment “Memos to Management.” This is intended to stress to students the idea that they should be researching what is affecting the firm—competitors and other elements of the environment—rather than the firm itself. It is, after all, not useful for a firm to be told what it is already doing.

Students are assigned to (1) read the article, (2) identify issues raised, (3) select one or more of the more important issues to address, (4) use library databases to find information needed to analyze the selected issues, and (5) write a “consulting report” to the management raising issues for decision making, identifying options available and their relative advantages and disadvantages, and additional primary research that would need to be performed to resolve the issues raised.

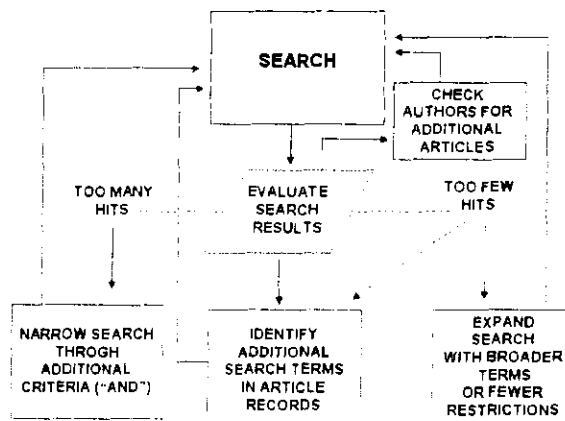
My thinking on these assignments have been influenced a great deal by my readings on law school pedagogy. In his book *One L*, Scott Turow (1988), indicates that the best answers to “issue spotter” exam questions typically only identify some 20-30% of the actual issues relevant to a given case scenario. Further, one justification for the large size of many law school course sections is that it is important to have a large number of individuals—and hence, perspectives—for the group to be collectively able to identify ideas needed to solve a given problem. Therefore, I strongly emphasize to the students that no one individual is expected to come up with all the ideas identified in the class and that the *marginal value* to an employer of ideas not identified by others is arguably greater than an analysis similar to that provided by others.

Performing secondary market research through library databases is an important part of the research based case process. Although an increasing number of students by now have had some experience with online databases such as Lexis-Nexis, it is highly recommended that students be given more specific training, either by the instructor or by a guest speaker librarian. If the Business & Industry database is available in the university library, this is especially recommended since articles here have been manually indexed by librarians against established library terms and categories in addition to search terms. This makes it possible to specify geographic region (country or region), industry, and marketing concept (e.g., market research, brand equity).

The explicit indexing of an article against established concept terms helps avoid false negatives that occur when key words used in a full-text search occur in a context which is not relevant. Such indexing also helps avoid “false negatives” where articles are missed because the author uses terminology that is slightly different from that expected by the researcher. For example, although subtle differences in meaning may exist between concepts such as “brand equity,” “brand leverage,” and “brand strength,” articles using any of these terms are likely to be similarly relevant. As illustrated in Figure 1, once a promising article has been found, it is possible to examine its descriptor terms and use this “snowballing” method to expand the reservoir of articles. If too many articles are found, the search may need to be narrowed by specifying additional terms or concepts that must be present or by excluding articles with descriptors that make them irrelevant (e.g., to use Boolean logic, “pricing NOT securities,” to specify articles dealing with pricing but *not* within the context of securities). For more information on search strategies, see Perner and Payne (2005).

Today’s students are often entirely too comfortable relying on information found in private and commercial web sites through Internet search engines despite the questionable quality of many of these sources. It is important to sensitize students to concerns about objectivity—the reality that most firm web sites are, in final analysis, essentially glorified advertisements—and questionable quality of such sites. My syllabus explicitly states that only sources from the U.S. Government, World Bank, or reputable periodicals are acceptable.

FIGURE 1  
THE SEARCH PROCESS



Adapted from Perner and Payne (2005)

The research based case has potential to effectively prepare students for addressing current challenges facing management. Unlike the traditional case where most of the relevant information is automatically provided to the student in a written case, the student is expected, here, to find and identify the relevant information. Although executives in high level management positions may have a great deal of information and preliminary analysis provided by staff and lower level management, graduates are likely to have to start their careers in low to mid-level management where it is unreasonable to expect to have had others collect all relevant information. College students typically have free access, through their institutional libraries, to several commercial databases such as Lexis-Nexis, Factiva, and Business & Industry. Firms using these databases for commercial purposes, however, will usually have to considerable hourly charges for access, and experience that leads to fast and effective searches is therefore quite valuable.

The research based case inherently vests the student with greater responsibility for the managerial process in requiring that he or she (1) identify relevant issues, (2) prioritize issues for research and analysis, (3) perform needed secondary research, (4) analyze information, (5) identify alternative options and strategies available, (5) identify the advantages and disadvantages of available options, and (6) identify additional primary research that would need to be performed to support more definitive conclusions and recommendations.

### **CHALLENGES OF RESEARCH BASED CASES**

Research based cases present a number of challenges to both the instructor and the student. Some of these challenges reflect the difficulty of performing a task that arguably simulates more closely the reality of current management tasks. Research based cases, in some ways, are somewhat less "efficient" than are traditional cases in that, for example, students must spend time searching for information rather than going straight to the analysis task. This inefficiency, however, must be measured against the potential skills that are gained in the process.

For faculty, the use of research based cases inherently involves more work than do traditional cases. Unlike cases made readily available from publishers, current source articles have to be discovered by the instructor. To maintain the promise of currency, new relevant and meaningful cases will

usually have to be discovered and adopted every term. This involves the time to find relevant articles; additional time for preparation by the instructor is to be expected, especially since there is no benefit of instructor notes provided by a publisher.

Grading research based cases is likely to be more complicated, time consuming, and open to question than is the case for traditional cases. Because students—encouraged to identify relevant issues, perform appropriate information search, and develop ideas and choices based on these tasks—have more latitude to meaningfully produce more heterogeneous work, more time is needed to analyze and evaluate their performance. Because the student is responsible for more discrete steps in the evaluation process, understanding the context of his or her performance is more challenging and time consuming. This, in turn, makes the grading of the paper appear somewhat more subjective, increasing the possibility of student challenges to the grading.

In terms of providing feedback to students, more extensive and elaborate comments may need to be made on each paper, and this feedback may be needed in a greater number of areas—e.g., problem identification, prioritization of problems for analysis, information search strategies, and idea evaluation.

The instructor may need to spend a considerable amount of time clarifying the expectations for the project and approaches to the process. In addition, class time may have to be devoted to the use of library databases for information search.

For students, a research based case is likely to be much more difficult. Although expectations for a complete analysis of ultimate data may be somewhat more lax, the student is inherently responsible for more tasks. To even begin on this new task, the student will need to understand the nature of its assignment and its expectations.

For some students, particularly at the undergraduate level, the greater ambiguity and absence of structure will be a source of frustration. Providing this challenge, however, is the whole purpose of this type of assignment. Thus, many students will resist this approach but may ultimately benefit more through the mastery of skills that have been so up to this point have been left relatively unexplored. It may be argued that this method is inherently more elitist—that the better students will "get up to speed" more quickly, potentially leaving others behind. However, it has been my experience that although there are often serious deficiencies in many of the papers submitted,

most students gradually pick up on the method with a resulting increase in the quality of their work.

Logistically, it may be more difficult for students—particularly non-traditional students who may have large work commitments in addition to their academic workload—to conveniently access library databases. However, many university libraries now offer database access for currently registered students through the Internet.

### EVALUATING MERITS OF RESEARCH BASED CASES

Jackowski and Daughtrey (2004) compare the merits of two alternatives to traditional cases: “live cases” and simulation. Here, “live” cases refer to consulting assignments wherein students are expected to tackle the real problems faced by actual firms. Simulation, in contrast, refers to simulated competitive games such as MarkStrat™ wherein students are expected to learn about a “market” based on the analysis of knowledge of certain market characteristics, their own performance, and that of competitors. Jennings (2002) found that students exposed to traditional cases, “action learning,” (which closely resembles Jackowski and Daughtrey’s “live” cases), and simulation perceived the latter as most effective. However, Rippin et. al. (2002) found that students, in reflecting on the diversity of cases they had completed within the business school curriculum, viewed cases more favorably, reasoning that principles from the diversity of settings studied would find application in future business challenges.

Jackowski and Daughtrey evaluate “live” cases and computer simulation in terms of coverage of problem identification, problem delineation, information gathering, idea generation, idea identification and refinement, and idea implementation. Their analysis summary is reproduced in the shaded region of Table 1. As indicated, they find both “live” cases and simulation to address identification, delineation, idea generation, and evaluation/refinement, although the former method is not concluded to ensure correct conclusions or decision. Only simulation is found to include implementation, and neither method is found to significantly involve information gathering.

TABLE 1  
“LIVE” CASES, COMPUTER SIMULATIONS,  
AND RESEARCH BASED CASES

Creative Problem Solving (CPS) and Related Processes	“Live Cases”	Computer Simulation	Research Based Cases
Problem Identification	Yes, but is it correct?	Yes	Identification of selected problems
Problem Delineation	Yes, but is it correct?	Yes	Tentative
Information Gathering	No	No	Yes
Idea Generation	Yes	Yes	Yes
Idea Evaluation and Refinement	Yes, but is it correct?	Yes	Tentative evaluation; refinement considered premature in papers but may occur to some extent in class discussions
Idea Implementation	No	Yes	Tentative
Identification of Additional Information Needed	No	Not available within framework	Yes
“Objective” feedback	No	Yes	No

Adapted from Jackowski and Daughtrey (2004). The shaded part of the table is from these authors.

Table 1 adds the criteria of the identification of additional primary research needs and opportunities for “objective feedback” and an evaluation of research based cases on Jackowski and Daughtrey’s criteria. Since information gathering is a main priority in research based cases, this method clearly emphasizes this step. Problem identification and delineation are addressed somewhat more tentatively in part because these steps are, to some extent,

contingent on insight from additional information to be gathered and are subject to some refinement. Idea generation appears comparable to other methods. Idea evaluation and refinement is seemingly more tentative in the research based case setting. To some extent, however, this perception may be based on explicit acknowledgement within the research case based framework that ultimate decisions must be based on market research that a firm with large resources and full time staff and executives, but not a student spreading his or her time among several classes and projects, would be able to undertake. Although strategies for idea implementation are considered, these will, for the same reason, remain more tentative. The research based case is ordinarily the only one of the three approaches that will identify needs for additional research. Although computer simulation may be able to provide "objective" feedback in terms of performance measures, the two case methods share in common an inability to result in objective feedback to students. This, however, is not unlike the business setting where performance measures and the perception of an individual's performance are often confounded by imperfect information, selective perception, and the difficulty in "decomposing" the relative influence of simultaneous causes.

A reviewer insightfully pointed out that articles that form the basis for research based articles often do not include information necessary to perform certain analyses. Even if information in a case is dated, the inclusion of relevant data allows—and even challenges—the student to perform "timeless" analyses such as marginal costing. In research based cases, finding such information—if it can be found at all—is likely to be a time consuming endeavor. Further, because students have so much choice in the issues that they can pursue, they may choose to "opt out" of questions with which they are not comfortable, emphasizing instead their strengths. Clearly, then, traditional cases may offer a more efficient way to introduce such challenges. Unlike textbook problems where the information is supplied with the question, the student will at least have to locate relevant information within the case. Simulations arguably represent an even more efficient way for students to gain experience working with actual numbers. However, traditional cases may be effective when it is desirable to spend less time than would be required by a complete, multi-period simulation. A mix of traditional and research based cases is an intriguing possibility, but this approach may prove too confusing.

## CONCLUSIONS

Research based cases represent an alternative to traditional cases that may help alleviate problems associated with retrospective analysis of past behavior and the implicit assumption that relevant information for decision making is readily provided. Implementing this instructional method does involve serious challenges and is likely to involve significantly more work. The process and outcome of this method are more difficult to predict as was dramatically illustrated when, once, a target firm was literally acquired by another two weeks before the case was scheduled for discussion. Overall, the use of research based cases may hold the greatest value when they are adopted by a select number of more innovative instructors who expand the diversity of students analytical experience. This is likely to result in high "marginal value" provided to students, and a valuable skill of information search through library databases is developed.

## REFERENCES

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