

Writing cases to advance wine business research and pedagogy

A Business Article by

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Abstract

This paper is meant to open a dialogue about the elements that constitute an outstanding wine business case study and, if used for teaching purposes, an instructor's manual. The ability to understand, synthesize, evaluate, and also create cases is becoming an increasingly important career-building skill for graduates of higher education programs across all disciplines. First we examine the market for wine business cases, and we then provide a step-by-step guide to the development of cases specifically targeted for wine business education.

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Discussion learning-based education, requiring the active engagement of students in critical thinking, has long been an important part of the educational mission at many business schools. At our universities' undergraduate, Masters, and Executive-level business seminars, we have used case method pedagogy to stimulate discussion-based learning. Students' written case analyses are also used to gather feedback on assurance of learning outcomes (AoL). These AoL comprise general business reasoning, global awareness, ethical issues, quantitative reasoning, as well as oral and written communications.

This paper is meant to open a dialogue about the elements that constitute an outstanding wine business case study and, if used for teaching purposes, an instructor's manual. The ability to understand, synthesize, evaluate, and also create cases is becoming an increasingly important career-building skill for graduates of higher education programs across all disciplines. Case studies about wine businesses can help achieve mastery of program learning outcomes and begin to close the loop (Alexander, 2011). Numerous wine business program graduates have reported that adding evidence of

their ability to create, review, or analyze cases to their "job search portfolios" had given them "an edge over other candidates" for a position. First we examine the market for wine business cases, and we then provide a step-by-step guide to the development of cases specifically targeted for wine business education.

The market for case studies

During Spring 2014, one of the authors of this paper conducted an on-line survey using SurveyMonkey to ascertain new needs for cases to enhance wine business education curriculum. Respondents were assured of individual anonymity but were given the option to self-identify if they planned to submit cases to a new textbook or journal. Respondents were asked to rate the importance of new cases by business sub-discipline—Accounting & Finance, Marketing, Operations, Management, and Strategic Management. The highlights of the survey were:

1. We received 118 complete responses from a global e-mail database of 886 business school professors for a 13.2% response rate. The database comprised members of the Academy of Wine Business Research, American Association

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Peer review under responsibility of Wine Economics and Policy.

Exhibit 1

A representative list of peer-reviewed case journals.

Source: Authors of this paper.

Name of journal	Sponsor	Accepts only decision cases	Accepts both decision and discussion cases	Primary focus
<i>Wine Business Case Research Journal</i>	Sonoma State University Wine Business Institute	X		Cases dealing with the wine industry
<i>Case Research Journal</i>	North American Case Research Assoc.	X		All business disciplines
<i>The Case Journal</i>	The Case Association		X	All business disciplines
<i>The Journal of Applied Case Research</i>	Southwest Case Research Association		X	All business disciplines
<i>The Journal of Finance Case Research</i>	Institute of Finance Case Research		X	Finance and Economics
<i>The Journal of Ethics & Entrepreneurship</i>	The Center for Ethics & Entrepreneurship, Gardner-Webb University		X	The intersection of ethics & entrepreneurship
<i>The Journal of Business Ethics Education</i>	Neilson Journal Publishing		X	Ethics

of Wine Economists, Western Casewriters Association, and North American Case Research Association.

- Respondents reported teaching a total of 6352 wine business students, and the annual average was 73 wine business students taught per respondent per academic year.
- Many respondents (58 or nearly 50% of the sample) reported that they taught courses related to wine business, and 18(16%) reported teaching *three or more* wine business classes in a given academic year.
- 50(42%) of respondents used cases extensively, and 49 (42%) used cases occasionally; respondents reported that case use was split evenly between undergraduate and post-baccalaureate courses.
- Respondents indicated that the following wine business case topics were of greatest interest (scale of 1=unimportant, to 5=very important):
 - Accounting and finance*: Sales forecasting (3.55), Business valuation (3.45), Financial Analysis (3.28)
 - Management*: New venture/Entrepreneurship (4.05), New business models (4.05), Performance measurement (3.82)
 - Marketing*: Differentiation strategy (4.08), Consumer behavior (3.98), Innovative wine marketing practices (3.89)
 - Production and operations*: Sustainability (3.84), Performance measurement (3.70), Supply chain management & value chain analysis (3.67)
 - Strategy*: Competitive strategy (4.04), Differentiation strategy (4.01), Competitive forces (3.90)
- 62 respondents (nearly 53% of the sample) expressed interest in developing and submitting new cases for publication.

Based upon these findings, there is evidently widespread interest in researching, writing, and publishing cases in the wine business domain.

Step 1—Planning

The initial step in planning a wine business case study (“case”) involves deciding its purpose or ultimate use. A case

can be intended for some research purpose i.e., to build or refute theory via comparative case analyses (Eisenhardt and Graebner, 2007; Sigglekow, 2007; Yin, 1994). Alternatively, a case can be developed for teaching purposes, i.e., to illustrate or derive theory in a classroom setting that involves a dialectical discussion to identify problems or challenges facing an organization and then generate and choose among solutions. In some instances, authors can craft a case that will satisfy both objectives, i.e. one might compare multiple teaching cases to build theory (cf. Gilinsky et al., 2008, 2010; Lawrence, 2010).

Aside from the differentiation between a case developed with a research purpose in mind and a case developed with the illustration of a theory in mind, there are also decision cases as compared to evaluative (sometimes called “discussion cases”). A decision case allows the student to internalize a real decision that an actor in the case must make and develop and support a solution for that decision. An evaluative case, on the other hand, presents information about a particular situation or event that has occurred in the past in an organization and allows the discussants to reflect upon the actions taken to learn lessons from the decisions made. This type of case can also be used to develop theory. One disadvantage of discussion or evaluative cases is that a number of journals only publish cases that are decision focused. Exhibit 1 is a representative list of case journals.

Step 2—Selecting a topic

Once you have decided upon the ultimate use of your case, put together a list of three-to-five major learning objectives and relevant interview questions tied to those objectives. It also makes good sense to tie your primary (field) and secondary (library or electronic database) research objectives to your program or school's learning objectives. See Exhibit 2 for five sample topics: (1) Goals, (2) Business model, (3) Situational environment, (4) Stakeholders, and (5) Assumptions and key metrics.

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