Case for Teaching

The Case of the Case: The Writing and Application of the Method

O Caso do Caso: A Escrita e a Aplicação do Método

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INTRODUCTION

At the beginning of the 2020 academic calendar, João Luiz Marinho was somewhat anxious for his debut as a teaching intern in the Organizational Strategies class of the undergraduate course in Business Administration. He was 25 years old, graduated in Business Administration, with a master's degree in the same area, had little experience in teaching and was in the second year of his doctorate in Business Administration at the University of Learning (UNIAPRE), located in Florianópolis, Santa Catarina. His advisor and professor of the discipline, Fernando Carvalho, dominated and masterfully conducted the concepts of the discipline. In the weeks before the start of classes, he shared the syllabus with João, explained to him the contents that would be discussed and agreed that he would be responsible for leading some of them in one of the classes during the semester. João realized that the teaching method used by Professor Fernando was not the traditional one, with explanation of the contents and PowerPoint support. Instead, he used active learning methodologies such as problem-based learning (PBL), gamification, hands on, and teaching case.

# of invited reviewers until the decision:

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1

In March 2020, the pandemic caused by the new coronavirus (COVID-19) put everyone in quarantine. Quickly, UNIAPRE migrated its classes to online. It was very new. João became even more apprehensive about how to conduct the class under his responsibility and decided to externalize his concerns with Professor Fernando. They were on a video call, talking precisely about the upcoming classes, now online: "Professor, I realized that, in the class on the topic of succession in family businesses that I am going to teach, there is no learning strategy. What methodology could we apply?" asked João. "What do you think of a teaching case? We can adapt to online, let's think of a form of application. Do you know this methodology?" asked Professor Fernando. "It is a short text, presented at the end of book chapters, a study of real situations, with a set of related questions," replied João.

Fernando, noticing that João was confusing the models, explained to him that what he was portraying was an example case, but there were also case studies, which are research methods. Unlike those, the teaching case describes a specific situation or problem, with an engaging narrative, and privileges the inductive learning process. The proposal is for students to put themselves in the protagonist's shoes and be encouraged to make the decision. The teacher asked João if he would like to build a case aligned with the learning objectives of the class in question and explained to him that he had applied a case in previous classes, but had to make adaptations, given that, in his searches in the databases, despite finding interesting cases, they were not adequate to the content of the class. João reflected on the professor's proposal and concluded that it was important to know how to write cases, after all, he wanted to pursue an academic career and improve his teaching didactics. Furthermore, the sudden change caused by the pandemic would be the opportunity to test the case in virtual mode.

The topic of succession in family businesses would be discussed at the tenth meeting of the discipline. João would have to start building the teaching case immediately, to finish it on time. Feeling challenged, he started writing his first case. Carla, a PhD colleague who was also a supervisee of Professor Fernando, helped him in the process. During the construction, João realized how much work it was to write a case. But something worried him as much as writing: it was the process of applying it in virtual mode. He needed to think of ways of conducting the application that would allow the active participation of students in the process and the effectiveness of inductive learning, as well as perceiving the differences between a lesson plan in face-to-face mode and a lesson plan in virtual mode.

PLANNING THE WRITING

In February 2020, in the first two classes of the Organizational Strategies course, João absorbed the content along with the students, paying attention to Professor Fernando's teaching and taking notes to help him in the preparation of activities. It was a large class, 54 students were enrolled. However, João was really worried about the class he was going to teach, since at the universities where he graduated and attended his master's degree, he had no contact with active methodologies. Professor Fernando, however, had written and published a few dozen cases. He was a case editor at a scientific journal and taught the discipline of teaching cases in the graduate program at UNIAPRE. João decided that in order to start building his first case, he needed to familiarize himself with them. His strategy was to research and download cases from the main scientific journals in the area, to identify their structure and writing patterns.

João was immersed in reading. This was an intriguing journey. Accustomed to reading and writing scientific articles, he looked with some strangeness at the teaching cases language. During the reading process, he observed that the cases: (1) centered on the report of a specific situation or problem experienced by a professional or a firm; (2) simulated a real situation; (3) had a well-defined, relevant, and emergency dilemma to be analyzed; (4) required decision-making; and (5) opened up possibilities for various discussions. Furthermore, he found that the cases were organized into two large sections: the case narrative and the teaching notes. Despite having spent days analyzing the cases, he still did not feel able to write. That's why he decided to chat via WhatsApp with Professor Fernando (Figure 1), who had made himself available to answer his questions.

Professor Fernando's tips added to what João learned in his research. He had noticed that, in the introduction, the authors informed the date and place where the case took place, presented the main protagonists and the context of the organization, and introduced the famous dilemma, which was later revisited in the last topic of the narrative section of the case. He had also verified that, in closing the case, in general, some directions were made and more reflective questions about the dilemma were included, both in the form of questions and statements.
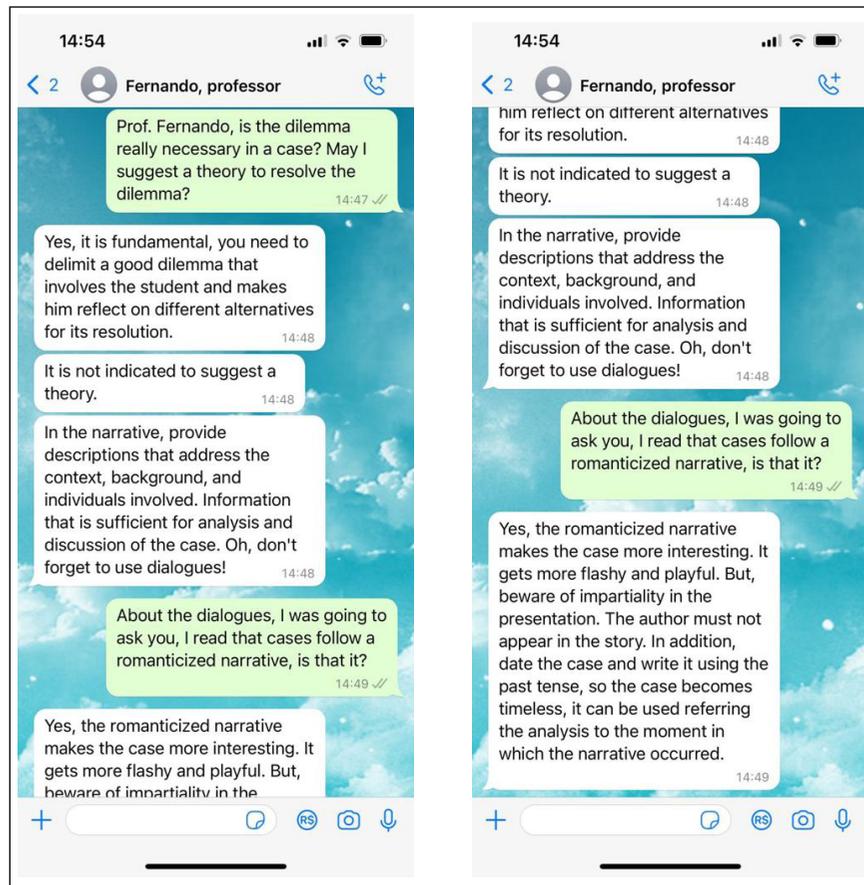
Figure 1. Dialogue between João and Professor Fernando.
Source: Prepared by the authors.

THE FEARED DILEMMA

João was aware of the organizational situation he would simulate, although he was still not sure how he would define the dilemma. During his research, he had observed, in the journals' instructions for authors, that he could choose to report a real case or a fictitious case, based on previous consulting experiences, for example. João had contact with some companies and chose to write about the real case of one firm in particular, a paint industry, founded by seven families nuclei, from which he had easy access to the managers. This firm was experiencing the planning of the succession process, which was the problem-situation he would deal with in the narrative. For this purpose, secondary and public data available on the internet and in internal firm documents were collected, as well as primary data, since João had scheduled individual interviews with representatives of the firm's families nuclei.

Professor Fernando helped him build a structure to guide the interviews. In it, questions related to the problem situation and about the background of those involved and the organization were included. After completing the interviews, João transcribed them and added them to the other collected data, organizing all the information according to its chronology and themes. However, amid that pile of information, he tried to envision what his dilemma would be, remembering the need pointed out by Professor Fernando, and which he had also observed, which was having a relevant and emergent problem that implied making an immediate decision, but for which no one had a clear answer. It had to be something that allowed several directions to the students. The more he thought about it, the more lost he felt.

It was a crucial moment. João needed help and decided to send Professor Fernando the information that he had organized, in addition to listing the obstacles that he saw in the information that the firm had given him, about the succession process. He believed that one of those obstacles could be the dilemma of the case. Professor Fernando reflected along with João and tried to identify the main problem, which was the most comprehensive and, simultaneously, allowed to generate more discussions about possible solutions. In the end, both agreed that the main decision to be taken by the firm referred to whether to carry out an internal succession or an external

succession. But it was also necessary to verify related decisions, such as: In an internal succession, would it be better to opt for one of the managing partners or for the extinction of the position? In external succession, how to choose a market manager with knowledge about the segment and aligned with the firm's culture?

THREE HEADS THINK BETTER THAN TWO — BUILDING CO-AUTHORSHIPS

As he wrote, João was able to see and outline his dilemma more clearly (see Annex 1). However, he wanted the evaluation of an experienced colleague and thought about the possibility of including a co-author to discuss the construction of the case with him. That afternoon, he had a call scheduled with Carla, who, as he recently learned, writes teaching cases. Both nurtured a collaborative relationship. João took advantage of the moment and reported his initiative to write a case and checked the possibility of her helping him with the reading of his outline. "How cool, João, are you thinking of submitting to an academic event in our area?" Carla asked. "I did not think about it. But it's an idea. Professor Fernando asked me to apply it with the Organizational Strategies classes. Would you like to co-author and write it together?" asked João excitedly. "Of course, I believe that Fernando likes our synergy, and it is another possibility of learning! This is how we do it: send me what you've already written, I'll contribute by controlling changes and taking notes, so you'll understand the writing process. You will find that writing cases is addictive, I love it!" Carla finished.

João sent what he had written. It was short, five pages. Carla, who had already taken a discipline on the use of the case method in her PhD course, was also enthusiastic. She liked to write cases and for her it was very rewarding to be able to pass on her teachings to those who were interested in learning.

REMEMBER YOUR LEARNING OBJECTIVES

As soon as she received the file, Carla opened it and read it. She liked what she read. Despite being a beginner, João had a 'knack' for writing cases. Carla sent the file with changes and called later to talk: "João, you've created a good narrative, but you need to make some adjustments. I noticed that you explained few situations directly related to the dilemma of the case. I suggest that you provide information that will help students in decision-making and not address so many unrelated items, because it became too comprehensive, and the case lost its objectivity." "Got it, I should focus on information that can contribute to the solution of the dilemma and remove those that do not help in the delimitation?" asked João. "That's right. I also remember that it needs to

be aligned with your learning objectives. Cases are written to serve specific purposes. The lack of a positioning hinders its adoption. I see you've written two learning objectives (see Annex 2). This definition is related to the dilemma and will guide your narrative. I think the objectives, the choice of topic within the discipline and the dilemma itself are good, but this generalization in the information makes the reader get lost." Carla pauses and continues, "Do not forget that the dilemma, in addition to opening up several resolution options, also needs to have the potential to relate to the theoretical concepts that will be addressed in the defined class."

Another point mentioned by Carla, regarding the writing of the case narrative, was that at times resolution options were presented, but this would not be ideal. João should discuss the possibilities in the teaching notes, so that the students themselves reflect on the possible alternatives. Furthermore, it is desirable to make the text more interesting, to dialogue with the reader and encourage the emergence of doubts, which will have repercussions on the answers that will be attributed to the case. Finally, Carla advised João to review the issue of value judgment, which is not welcome in writing cases, and emphasized that a literature review should not be carried out in the narrative. They should be located in the teaching notes from the analysis of the questions for discussion.

João thanked Carla, hung up and, while making coffee, went over the conversation and tried to outline the next steps in his mind. First, he would return to the case narrative section to make adjustments suggested by Carla and pay attention to the adjustments that she made. Before sending the file back to Professor Fernando, he would ask for Carla's analysis again. They decided to send the version to Professor Fernando only after being well aligned between them both. João was looking forward for his feedback!

Also during the week, João and Carla dedicated themselves to the narrative section. They had different characters for the story, considering the company was made up of seven family groups. Thus, to demonstrate the controversial opinions of the partners on the succession process, they chose to simulate a meeting using the excerpts mentioned in the individual interviews (see Annex 3). The characterization of characters was based on key actors, such as: the CEO; the partner who suggested hearing each partner individually about the succession process; and the managing partners who were seen by some of the interviewees as possible successors. By the end, when they felt satisfied, they sent the file back to Professor Fernando. A day later, the teacher replied to them: "Hello, João and Carla! Glad you decided to work together! I am glad to receive the narrative section version of the case. I see you've put some effort into the writing. Just for improvement purposes, I suggest you use a little more creativity in the construction of titles and subtitles. Regarding

the application of the case in the online format, have you thought about its operationalization? I made some notes in the file, it is attached. I'm available."

João and Carla still hadn't had a good idea about how to apply the case in the virtual modality and passed this question on to the professor. Afterwards, João made the suggested adjustments and readjusted the titles and subtitles. He thought he could explore the company's area of expertise. As it was a paint industry, he checked the meaning of the colors and aligned the topics, such as: 'green, the color of growth' and 'red, the color of conflicts.' He then validated the suggestion with Carla, and they began to prepare for the construction of teaching notes. He agreed with Carla that he would take the initiative in the case, as he wanted to learn how to actually produce one. Thus, she would be his support.

FOLLOWING TO TEACHING NOTES

João felt he needed more information before diving into the writing of teaching notes, so he resorted again to the databases, evaluated the structure pattern of some cases, but now he focused only on the notes. He found that the authors pointed out: (1) the data sources used in the case narrative; (2) learning objectives; (3) the sessions and subjects suggested for application; (4) the proposal of a lesson plan; (5) discussion questions; and (6) the analysis of the questions articulated with the theoretical basis.

Previously, João wrote the learning objectives and included the subject for application, so the next topic would be to write the data sources. He reported on the interviews conducted and the decision to change the name of the company and the characters to preserve their identity. Next, he began to think about defining the questions and the lesson plan. He was aware that the issues had to be aligned with the objectives. But he felt uneasy, firstly due to his lack of experience in applying cases, and secondly because they were taking classes in the remote model and did not know how long they would stay that way.

João wondered how to define questions that generate discussion. Should he address the two application possibilities — face-to-face and online? How many alternatives would be enough for the analysis of the case? What would be the best strategies to include in a virtual lesson plan? When should you test the case with the class? He was immersed in doubts and decided to chat via WhatsApp with Carla (Figure 2).
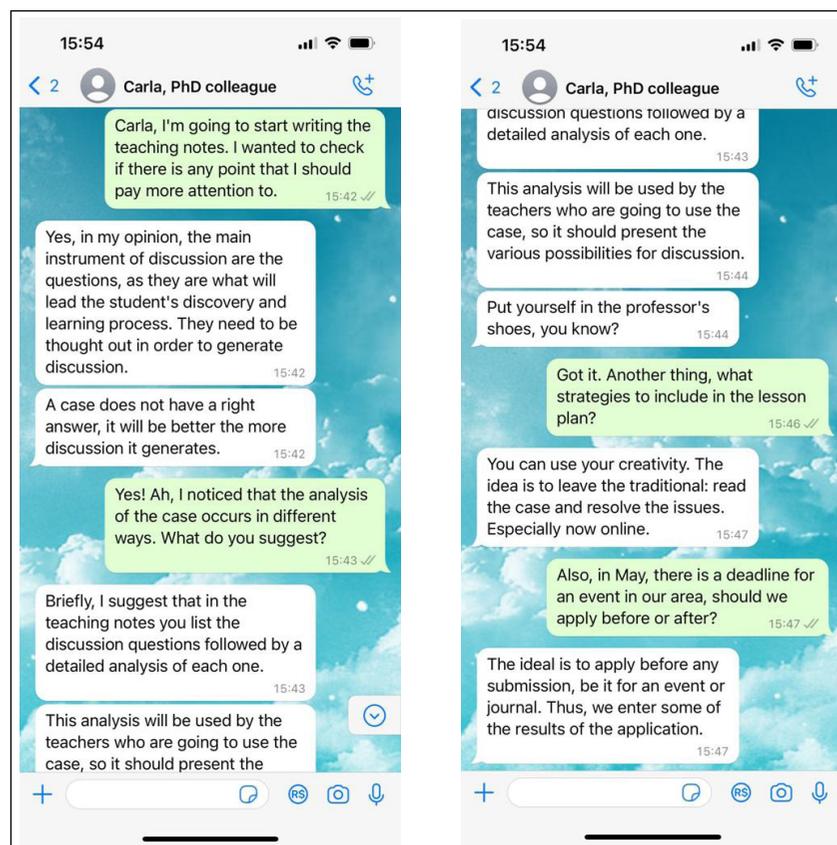

Figure 2. Dialogue between João and Carla.
Source: Prepared by the authors.

João followed Carla's suggestions, but, in his readings, he found cases in which the questions were followed by a general discussion, instead of a detailed analysis of each one. He also visualized cases that, in the resolution of the questions, presented pictures or illustrations of schemes constructed during the case test application. He also realized that the writing of notes, in some cases, was more dialoguing with the teacher and reflective, with new questions in the answers themselves and, in others, more descriptive.

CASE APPLICATION

The days went by, João carried out his PhD student routine, and face-to-face meetings at the university were replaced by video calls and videoconferences between fellow doctoral and master's students. In one of them, Carla and João told the others about João's experience with the production of his first teaching case. João was astonished to learn that many had experience with the production. Curious about the progress of his case, they asked him how the application would be. Realizing that João still wasn't clear on the subject, his colleagues started giving ideas on how to make the applicability of the case for teaching more attractive, even in the synchronous virtual modality: "How about you ask the students to record a video, in a video call between them, simulating a meeting of the firm's partners, in which they would be discussing the succession process as if they were the protagonists, positioning themselves according to the vision also exposed by the character in case?" Nara suggested. "I think it would be nice to leave it open, it doesn't have to be a video. In an application I made, students simulated a meeting, but they used audio recording and posted it as a podcast for access by others," added Luzia. You could also do this simulation in class. The application used by UNIAPRE allows the class to be divided into parallel rooms; you could divide between the characters who are going to act, provide a few minutes to discuss in a parallel room and then come to the general room to have the meeting. Thus, it is more improvised and different things can arise," Lucas said.

The conversation continued for a while, and João, at the end, thanked his colleagues for their ideas for applying his case and for their reports, such as that of Lucas, a third-year doctoral student who added that, in their teaching internship, the professor passed the case to the class, divided it into groups, and asked them to complete the resolution as homework and present it in the next class. He emphasized that this was not productive and that how you apply the case is as important as your writing.

That night, João couldn't get away from the topic of applying the case. He would think about his colleagues' suggestions and mentally operationalize them. Finally, he decided to put the ideas on the paper. He wrote down his colleagues' suggestions and had an idea: what if he called his colleagues to be the characters in the case, simulating interviews for them during the class? Professor Fernando had mentioned the difficulty that students have in reading the case beforehand, and, in the online format, he suspected it would be even more complicated. Immediately, he called Carla and told her his idea. Initially, she was somewhat skeptical and pointed out that this could influence students' decisions, as they could sympathize more with one character and less with another. But during the conversation, they concluded that it was a plausible and quite innovative possibility to present the case story.

However, in addition to presenting the story in a different and engaging way, the way in which the students would discuss and resolve the dilemma is more relevant, as this is when they would be acting as protagonists. João was thinking about the ideas of Nara, Luzia, and Lucas. His concerns were related to the time allocated to the class to carry out the dynamics, its organization, and the involvement of the students, who used to keep the cameras off and engage less in the virtual class compared to those that take place in person. He wrote down his thoughts to discuss them with Professor Fernando.

CLOSING THE CASE

João started with the discussion questions: he proposed a set of questions aligned with the discipline of Organizational Strategies and elaborated the resolution of the questions associating the theoretical concepts with the organizational situation discussed. When finished, he sent the file to Carla. They had created an interesting synergy: one wrote and sent it to the other, who contributed and provided feedback. So João was learning a lot. Carla returned with some comments, asked him to be careful with the resolution of the questions, given that the information necessary for the students to be able to respond needed to be included in the case narrative. She also pointed out that it is necessary that the questions are well aligned with the learning objectives and should not present, in their writing, theories and concepts. As an example, she mentioned question 3 of the case, in which João cited a specific source, which should not be done. She also stressed that the questions should not seem like an exercise but needed to raise interest and encourage discussion.

Regarding the application of the case, Carla suggested they should schedule a conversation with Professor Fernando, which was scheduled for the following day. Before that, João wrote all the suggestions discussed with colleagues and his own idea. For the remainder of the

afternoon, he rewrote the discussion questions (see Annex 4) and analysis, including transitions questions (TQs), in order to guide the students' discussion. Next, he began writing the lesson plan, following Carla's instructions, who commented to João that, in addition to checking suggestions for other cases, he should also read an article or book that addressed teaching strategies. The following day, at the meeting scheduled by Carla, Professor Fernando demonstrated that he was satisfied with the application suggestions and left the definition up to João and Carla.

The date on which João would teach his teaching internship was approaching and his first case for teaching was almost finished. He was satisfied with what he had built with the help of Professor Fernando, Carla, and colleagues from the graduate program. However, he felt insecure, after all, it would be during the application of the case that he would have his first formal feedback from third parties. But he needed to decide whether to use one of his colleagues' suggestions, which had already been tested, or test a new strategy. He also wondered about his own idea of simulating a theater with the participation of his colleagues, to present the case to students during class. Which of the suggested applications would yield greater active participation of students in the process? What would be the most appropriate format to conduct the presentation of the case and the discussion of the dilemma? What would be the main differences between a plan for a face-to-face class and a virtual plan?

ANNEX 1

After all, what is the best decision to be made? Should they carry out internal or external succession? Would it be better to choose one of the managing partners or the extinction of the position in the internal succession? In the external succession, would a market manager with knowledge about the segment bring benefits to Tink? Would the company's culture be at risk with the external succession? Would Tink be prepared for this succession process? There were many doubts and challenges about the future management of Tink.

Figure A1. Dilemma.

ANNEX 2

This case was developed for application in undergraduate and graduate lato sensu courses in the field of Management, in disciplines of Organizational Strategies and People Management, in sessions that address the concepts related to succession in family businesses, management skills, and culture maintenance. Through the case, it is expected that the student will develop an understanding of the definition of the term 'succession' and its possible implications for culture and an understanding of the managerial skills necessary for the position of CEO of an organization. Therefore, the didactic objectives are (a) to understand the concepts of succession, managerial skills, and maintenance of culture, and (b) to critically analyze the processes of internal and external succession in a family business.

Figure A2. Learning objectives.

ANNEX 3

On the one hand, a part of the partners, mainly those who did not work in the company, defended external succession, as they did not identify, in the current team, the profile apt to occupy Pedro's chair. They supported the idea of professionalizing management in order to separate family relationships from professional decisions at Tink …

… The group that defended the internal succession was made up of managing partners, and their families bet mainly on maintaining the company's culture, which, for them, would be put at risk by a market professional. The group believed that someone from inside, who already worked at Tink, would continue the current management without making extreme changes. They defended the family culture and wanted the company to continue to be managed by one of the partners.

Figure A3. Presentation of controversial opinions.

ANNEX 4

Question 1. Detail the characteristics of the company Tink.

Question 2. Assess the succession options for Tink, considering their impacts.

Question 3. Identify and analyze each of the managing partners' management skills for succession purposes at the company Tink.

Question 4. At Tink, maintaining culture was a significant factor, from the perspective of several managing partners. What can be done to ensure the maintenance of the company's culture in each succession model?

Figure A4. Questions for discussion.

Teaching Notes

■ ABSTRACT

This case aims to promote a reflection on the teaching case writing process and directions for applying the method. In 2020, João Luiz Marinho, a doctoral candidate in Administration at the University of Learning (UNIAPRE), was challenged by Professor Fernando to write his first teaching case for application in the Organizational Strategies discipline, of which he was an intern in teaching. However, many questions about the construction and application of teaching cases probed João's thoughts, since he had no previous experience with the method, he had little practice in teaching, and the migration of classes to the online mode was very new. Thus, the proposal is to make students put themselves in João's place, in order to provide a debate on the writing and application of a case for online teaching. It is suggested that it be applied in lato sensu and stricto sensu graduate courses in Administration in the disciplines of Methodology and Teaching Cases.

Keywords: teaching cases; writing; method application; online class.

■ RESUMO

Este caso objetiva promover uma reflexão sobre o processo de escrita de casos para ensino e direcionamentos para aplicação do método. Em 2020, João Luiz Marinho, doutorando em Administração na Universidade do Aprendizado (UNIAPRE), foi desafiado pelo professor Fernando a escrever o seu primeiro caso para ensino para aplicação na disciplina de Estratégias Organizacionais, da qual era estagiário em docência. Porém, muitos questionamentos sobre a construção e aplicação de casos para ensino sondavam os pensamentos de João, uma vez que este não tinha experiências anteriores com o método, possuía pouca prática na docência e a migração das aulas para a modalidade on-line era novidade. Assim, a proposta foi fazer com que os alunos se colocassem no lugar de João, a fim de propiciar um debate sobre a escrita e aplicação de um caso para ensino na modalidade on-line. Sugere-se sua aplicação nos cursos de pós-graduação *lato sensu* e *stricto sensu* em Administração, nas disciplinas de Metodologia e Casos para Ensino.

Palavras-chave: casos para ensino; escrita; aplicação do método; aula on-line.

LEARNING OBJECTIVES

The present case was built for application in lato sensu and stricto sensu postgraduate courses in Business Administration in the disciplines of Methodology and Cases for Teaching, in sessions that address concepts related to the construction and application of the case method. It is expected that the student can develop an understanding of the process of writing cases and guidelines for application in the online modality. Thus, the learning objectives are: (a) to understand the process of writing a teaching case; and (b) to reflect on the application of a case for teaching in the online modality.

DATA SOURCES

This teaching case was based on real situations experienced by the authors in the production, application, and publication of teaching cases. For didactic purposes, the authors created a situation and fictional characters, as well as made use of excerpts from a published teaching case, with the authorization of its authors, to represent the case that was being written by the protagonists. As an example, the

case entitled "Holy House or New Blood? Tink's Succession Case" was chosen, published in the *Revista de Administração Contemporânea* in the year 2021, because it was verified, along with the first author of this case, that it was her first experience of writing a case for teaching.

TEACHING PLAN

For class's discussion, students would benefit if case could be made available for prior reading, without the teaching notes section. The professor can open the discussion in plenary, exposing the dynamics that will be used for the analysis of the case. It is proposed that an initial discussion be held, in small groups, of the proposed questions, and a final discussion in the large group. The online modality can be explored by rotating group members and assigning their missions within the newly allocated group, to increase the dynamism in the discussions. Finally, the teacher can close the discussions in the large group by equalizing the information, mapping the students' speeches, and relating them to the underlying theoretical concepts. In Table 1, the distribution of proposed times for application of the teaching case in the classroom is presented.

Table 1. Suggestion for distributing the time for application of the teaching case.

Activities	Duration (minutes)
Opening of the case discussion in plenary	5
Discussion of issues in small groups	40
Discussion of questions in the large group	40
Closing of discussions	15

Note. Source: Prepared by the authors.

OPENING OF CASE DISCUSSION IN PLENARY

At the beginning of the discussion, the teacher can explain the dynamics of the analysis and discussion of the teaching case and ask two opening questions: What is a teaching case? What is the difference between teaching cases, case examples, and case studies? These questions will allow solving the doubts that the students present about the conceptualization of the case methodology. It would also be relevant to point out the existence of different types of cases that contribute to different learning and development of specific skills, such as investigation, prospection, decision, and debate (Moldoveanu, 2022), informing students that, in the case under analysis, the view of a decision case prevails.

Next, it is recommended that small groups (of three or four students, depending on the size of the class) discuss the proposed questions about writing and applying a teaching case. By doing so, students will be prepared to share their arguments and positions during the large group discussion. The professor should mediate the debate and carry out a mapping of what was discussed, for the later closing of the plenary session.

ANALYSIS OF CASE IN PLENARY WITH SUPPORT ON LITERATURE

To stimulate the analysis of the case, two axes of questions were proposed. The first includes discussions on the process of writing a case for teaching, and the second on the application of a case in the online modality. These questions are suggestive, and may be changed at the teacher's discretion, considering the best adherence to their lesson plan.

Axis 1: Process of writing a teaching case

Question 1. Considering João's learnings, how would you plan the process of writing a teaching case?

The objective of the first question is to reflect on the planning of writing a case for teaching. To this end, transition questions are proposed:

TQ 1. How did João plan to write his first teaching case?

The teacher needs to encourage students to map the steps considered by João in writing his first case for teaching. It was possible to observe that, to prepare for writing, João researched and downloaded some cases from the main scientific journals in the area and identified their structure and writing patterns. With the initial understandings, João delimited the learning objectives and the section of the class and the discipline for which the case would be destined. Then, he sought out a company that had experienced the problem situation that he would deal with in the narrative and carried out a collection of primary and secondary data. Then, armed with the data, he defined the main dilemma and wrote the narrative considering the characterization of the characters and the company and the situations related to the main dilemma. With the narrative section finished, João started working on the teaching notes section, defined the questions considering the learning objectives, wrote suggested answers for the questions, included the source of the data and, finally, started writing the plan of class.

TQ 2. What different methods do you think can be applied for planning the writing of a case?

The teacher should allow students to use their imagination to draw different planning scenarios for case writing and show that this planning can follow different patterns. First of all, reading published teaching cases, as well as books and articles that are intended to discuss case writing (such as Alberton & Silva, 2018; Roesch, 2007), is a strategy for beginning authors, but also for authors who want to stay updated and improve their case writing. Second, although learning objectives are often the precursors in writing, there are authors who start writing when they become aware of an interesting situation-problem in the organizational routine, which they believe to be relevant for discussion in the classroom or that approach themes already discussed in their disciplines. Third, the dilemma drives the narrative; apparently, it would be necessary to define it to be able to construct it, but it may happen that the dilemma

is defined simultaneously throughout the writing of the narrative. Fourth, the solutions to the questions can be thought of after the application, according to the students' own answers. Finally, participating in scientific events on specific themes of cases for teaching can bring interesting insights into the improvement of writing cases, as well as their application in the classroom can reveal problems of interpretation that will lead to improvement.

Question 2. Considering João's learnings, how to write a good narrative in a teaching case?

The objective of the second question is to discuss the central elements in writing a case narrative and the possibilities of resources to make it more attractive. To this end, TQs are proposed:

TQ 1. What elements did João consider when writing the case narrative?

The teacher needs to lead the students to outline the elements mentioned during the case that were considered by João in writing the narrative. It appears that the first element of the narrative consists of the introduction. João noticed that this section contemplates: (1) the date and place where the story took place, (2) the protagonist and the context, and (3) the dilemma. This information is structural, allowing the reader to know the context and temporality, create empathy with the protagonist, and connect with the dilemma (Alberton & Silva, 2018). They also present the theme of the case to the reader and should encourage him to resolve the situation and continue reading (Silva & Bandeira-de-Mello, 2021).

The other elements that are weighted in the other sections of the narrative consist of: (1) description of the context, (2) antecedents, (3) individuals involved, and (4) situations related to the dilemma. The narrative is structured in sections, separated by subheadings. It is recommended to think about the most logical and interesting structure for the story to be told to a reader who does not know any information regarding the situation that will be exposed to him (Roesch, 2007). Information needs to assist decision-making, and must be structured, ordered chronologically and chained, written objectively and impartially (Alberton & Silva, 2018). Not all information will be used, some may not be useful. Priority should be given to what is relevant (Silva & Bandeira-de-Mello, 2021) for the student to develop a deep analysis of the case and carry out a rich discussion in the classroom (Chimenti, 2020).

TQ 2. What resources would you suggest to make the narrative more attractive?

The teacher should encourage students to initially check the resources pointed out during the case and, subsequently, use their creativity to suggest resources that could make the case narrative more attractive. Exercises can be carried out in the classroom to identify resources used in other published cases. In this way, the teacher can guide students to contrast those publications with the examples given in this case. In this case, it was proposed that João develop a romanticized writing that dialogues with the reader, with imaginative titles and subtitles, dialogues between characters and an antagonist. It is observed that the process of writing a case is challenging, the writer needs to be ingenious, original, and inspiring (Chimenti, 2020), detach from traditional academic language, and adopt a more informal narrative (Alberton & Silva, 2018). Therefore, students can be innovative in their suggestions to make the case closer to the experienced reality (Faria & Figueiredo, 2013), effectively inserting themselves in the position of decision maker and exercising their skills in applying the case (Meller-da-Silva & Lapedra, 2021).

TQ 3. How to define a dilemma that promotes a good discussion?

The teacher must encourage students to observe, in the case narrative, how João delimited the dilemma and then reflect on the characteristics that permeate a good dilemma that will allow for a good discussion. Dilemma is conceptualized as a problem experienced by a professional or an organization, which requires decision-making and presents different possibilities of resolution (Alberton & Silva, 2018). In this case, it was observed that, to define the dilemma, João considered his contact with some companies and chose to write about a real case, as nothing surpasses real problems. A dilemma that emerges from history and interviews with those involved is always more interesting than a fictional dilemma (Chimenti, 2020). João also looked for a relevant and emergency situation-problem, which had the potential to relate to theoretical concepts and encourage the student to reflect on different paths (Alberton & Silva, 2018), without an obvious solution.

In addition, it was found that João indirectly presented the dilemma in the general sections of the narrative, based on related situations and with greater emphasis at the end of the introduction and in the final paragraph of the last section of the narrative, with directions and questions. In this way, the case for teaching is presented in a circular way, the beginning and the end complement each other. In the final paragraph, some information related to the problem situation is repeated and the student is challenged to seek alternatives to solve the dilemma (Roesch, 2007). The closure of the case needs to take place at an interesting time and with tension and emergency, so the student assumes the role of protagonist (Silva & Bandeira-de-Mello, 2021).

Question 3. Considering João's learnings, how to write a good teaching notes section in a teaching case?

The objective of the third question is to discuss the central elements in writing teaching notes. To focus on teaching notes, TQs are proposed:

TQ 1. How are delineated the objectives of a case and the discipline for application?

The teacher needs to encourage students to identify, in the case narrative, how the objectives and discipline were chosen and then reflect on other means for their delimitation. In this case, the motivation for the writing was its application in a succession class in family businesses, in the Organizational Strategies discipline. Therefore, the choice of discipline was natural and the objectives respected the purpose of the intended class. However, as mentioned earlier, writing planning can follow different patterns. Sometimes authors start writing when they become aware of an interesting situation-problem in the organizational routine, consequently, they need to reflect on a topic within a discipline that is related to the identified problem and define objectives that are aligned with it. Objectives should be defined thinking about the student who will read and interpret the case and not the professor who will apply it (Silva & Bandeira-de-Mello, 2021). Cases are developed to serve one or more learning objectives, and authors need to clearly convey this information during writing, as the lack of a clear position hinders case adoption.

TQ 2. How to define discussion questions in the case that allow different solutions?

As suggested in the previous questions, the teacher must, first, lead the students to verify the points raised in the narrative about the definition of questions and, in the sequence, allow them to reflect, as students, which questions would allow them greater debate and present more possibilities for answers. In the case, it was mentioned that the discussion questions will lead the student's discovery and learning process; therefore, they need to be written in a way to force them to think about the solution, without forgetting that a case does not have a right answer. The questions need to be aligned with the learning objectives, be creative, and not seem like a mere exercise. Therefore, in its definition, one should think about the dilemma and the alternatives for its analysis and discussion. The questions need to be arranged in a logical sequence (Silva & Bandeira-de-Mello, 2021) to facilitate their understanding by the student. The organization can be done according to the learning objectives or with titles and subtitles of the case (Roesch, 2007). Well-formulated questions arouse interest, inspire discussions, and enliven learning (Roesch, 2007), in addition to inducing the student to consider hypotheses and the related pros and cons (Silva & Bandeira-de-Mello, 2021).

TQ 3. How to build analyses of the discussion questions that help the application of the case?

The teacher must, again, remember that writing planning has different standards: the analyses of the questions can be done by the authors, but they can also be thought of from the application of the case in the classroom, according to the students' own answers. First, students need to notice the discussions that took place during the case. It is observed that João was instructed to list the discussion questions followed by an articulated analysis with a theoretical basis, as well as to use only information about the company that is found in the case narrative. Second, students can imagine themselves in the role of future teachers who will apply the cases, reflecting on what information in solving the questions would be useful to aid their application. Good teaching grades tend to generate great classes, in addition to being considered an act of generosity by the authors of the case (Chimenti, 2020). The resolution of questions will be an instrument used by the teacher, therefore, several possibilities for discussion should be presented, such as considering the information presented in the case narrative, enabling its comparison with similar practices, and comparing it with the theory of the area (Roesch, 2007).

Axis 2: Application of a case in the online modality

Question 4. How to apply teaching cases for online modality?

The objective of the fourth question is to discuss the application of cases for teaching in the online modality. For better analysis, the following TQs are proposed:

TQ 1. How could João conduct the application of the case?

The teacher needs to prompt students to think about the many ways a teacher can apply a case for teaching in an online class. In João's situation, colleagues suggested asking the students to record a video, simulating a meeting of partners, in which they would be discussing the succession process, positioning themselves according to the views exposed by the characters. Another suggestion would be for students to simulate a meeting using audio recording and post it as a podcast. In addition, the applications made available by the higher education institution can be used to apply the case in the remote class. Some applications allow the division of the class into virtual rooms, in which students could be divided between characters, establishing a time for online discussion and then holding the meeting in the physical room, in real time. Thus, improvisation could result in excellent discussions.

For application in the virtual environment, the teacher must carefully evaluate what needs to be synchronous and

what will work best asynchronously, considering that not all students have the same technical access to online learning and may have problems with the platform. There are differences between face-to-face and online case discussions, but the goal is still the same. Most cases focus on decisions, and in the online modality it is possible to put more work on students to decide what to do. If students feel responsible for these decisions, it is likely that they will invest more time and that the result of the application will have quality (Schiano, 2020).

TQ 2. In your opinion, is the concern of João and Carla's colleagues regarding the application of cases for teaching online justified? Explain.

The teacher should lead students to reflect on the contemporary context of the use of technological innovations in education and on the increase in online course offerings. In the case, it was portrayed that, with the COVID-19 pandemic, several universities migrated to the virtual environment. At that moment, the fear of João's colleagues regarding the application of cases in the virtual environment was related to the quality of its application in person. In their view, in the online format there would be a greater challenge for the case method to make sense. However, it is necessary to note that students' learning expectations are the same as before the pandemic; therefore, the teaching plan should not diminish the use of the case method in virtual environments, but rather, teachers should focus on how to play their role to obtain equivalent learning experiences (García & Cabañas, 2021). Technology can facilitate the use of the case method in the virtual environment, enabling interaction, group discussions and work, recording sessions, and connection between students and teachers (Bisoux, 2020).

The use of the virtual learning environment during the pandemic presented new challenges for the learning process, specifically in Brazil, where the platforms used do not necessarily allow for adequate interaction. In this environment there are challenges such as distractions; internet access quality and technical problems; work-related overload that also migrated to the virtual environment through the home office; lack of student engagement; and increased cognitive load for students and teachers (Schiano, 2020). In addition, in the Brazilian context, the habit of students leaving their cameras off and rarely opening their audios has become a challenge for the teacher, in addition to the lack of focus, loss of intimacy, lack of body language, lack of control over the environment, among other inconveniences (Schiano & Narayanan, 2020). These challenges need to be considered beyond the pandemic period, considering the demand for teaching in a virtual environment, as there is enormous potential for working with the case method for teaching in these online modalities.

TQ 3. Cite examples of experiences with cases for teaching in face-to-face and online modalities.

The teacher can explore the experience of the students, and bring up the need to develop the modality of cases in synchronous classes, a reality experienced in the period of the COVID-19 pandemic. Contrast the students' experiences with the suggestions given by João and Carla's colleagues. Are they relevant? Do students believe in its effectiveness? Would you like to respond to cases in the way suggested in the case narrative? For negatives, request suggestions, which must be compiled for the group to view.

CLOSING OF THE CASE DISCUSSION

Finally, it is suggested that students who had the opportunity to write a case report to other colleagues whether the writing process reflected on their training. In writing a case, the roles of researcher and teacher meet (Chimenti, 2020); the process brings learning both to those who write and to those who analyze it (Roesch, 2007). Another proposal would be the simulation of an event presentation, in which an explanation is made of what was discussed about the writing process and application of cases for teaching. For this, characters can be defined among the students, in which some would be the 'participants' and others would be the 'evaluators.'

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