17 - 21 July 2017, from 9.00 to 13.00

Course title:  
CASE STUDY RESEARCH: DESIGN, EXECUTION AND PUBLICATION  
ECTS credits: 6

Lecturer: Professor Rui Sousa, Catholic University of Portugal (Porto)  
Contact: rsousa@porto.ucp.pt

AIMS OF THE COURSE:  
There have been recent calls in the Business Studies field for stronger theory development, as well as for more relevant and impactful research. The case method is one of the most powerful empirical research methods for accomplishing these objectives. But in order to achieve these goals and lead to high quality publications, case research needs to be rigorously designed and conducted. The challenges in conducting case research and the ways to deal with them are often of a tacit nature and not well understood. The objective of this course is to provide a hands-on roadmap for designing, conducting and publishing high-quality case-based research in the field of Business Studies.

The course is appropriate to all PhD students and junior researchers that plan to engage in case-based research during their studies or who wish to master the case-method as part of their broad research skills tool kit. Case research may be employed as the sole method in a PhD thesis or in combination with other methods, such as survey, modelling, simulation, etc. Since the course covers all stages of case research (from design to publication), the course will be of value to students at all stages of their PhD program. This may range from a first-year student who has a research question and is about to design his/her research, as well as a student who has already conducted data collection and is engaged in analysing the data, writing and publishing a paper.

COURSE SYLLABUS:  
1. Introduction to case research  
Developing research questions and choosing a research approach. What is a case study – key features of the case method.

2. When to use case research
Strengths and weaknesses of the case approach. Single versus multiple cases. Triangulation with other methods. Selection of cases - replication versus sampling logic.

3. Case methodology
Developing the research framework, constructs and questions. Developing research instruments and protocols. Choice of data to be collected. Data collection methods. Interviewing strategies. Use of secondary data. Validation.

4. Case analysis

5. Writing up, evaluating and publishing case research
Recognizing good case research. Issues in publishing case research. Navigating the journal submission and review process.

LIST OF READINGS:
Participants should read the following articles in advance of the course:

The second article will be used extensively throughout the course to illustrate concepts and as a basis for class discussion.

Further readings:

*Case study method:*

*Using case studies to build theory:*

*Using case studies to test theory:*


*Longitudinal case studies:*


*Data collection:*


*Analysis of qualitative data:*


*Non-parametric statistical tests:*


**TEACHING METHODS:**

Each daily session (4 contact hours) will include a mix of a standard lecture (exposing the key concepts of the session) and student group work, including focused discussions and presentations. The lecturer will draw on several hands-on examples of his own research, delving into the detailed and often tacit issues arising when designing, conducting and publishing case-based research in the context of a PhD program. During the classes, the students will be encouraged to reflect and discuss how the concepts learned in class can be applied to their own PhD research.
Students wishing to receive credits for the course will be assessed based on the following elements:

1. A short presentation outlining how the concepts learned in the course can be applied in their own research. This presentation will take place in the last class. All students are encouraged to discuss and provide feedback to their peers. Discussing other people’s work is a great way to reflect on one’s own research, since many challenges are common across research projects.

2. One written report (max 4000 words) outlining how the concepts learned in the course can be applied in their own research. Depending on the student’s goals, this could comprise a description and justification of the research design to be adopted, of how the field work will be conducted, how the data will be analysed, etc. The report should be handed in by email to the lecturer one week after the last class.

3. Class attendance and quality participation in in-class discussions and exercises.

Assessment weights:
1&2 (joint assessment): 80% of the final grade
3: 20% of the final grade

The main goal of the assessment is for students to use the course to advance their own research. They will receive useful feedback on their case-based research both from the lecturer and their fellow colleagues.

The lecturer will be available to advise students on the development of their assignments.

**Lecturer’s Biographical Note:**

*Rui Sousa has received his PhD from the London Business School. His doctoral work – based on case research - has been awarded the 2000/2001 EFQM PhD Thesis Award, an international award given by the European Foundation for Quality Management for the best thesis in Quality Management, recognizing an outstanding contribution to the development of the field and degree of innovation of the findings. His research has won several awards and has been published in leading international journals, including the Journal of Operations Management, Production and Operations Management, Decision Sciences, International Journal of Operations & Production Management and the Journal of Service Research. Rui serves on a number of Editorial Review Boards (e.g., JOM, IJOPM) and has served for six years in the Board of the European Operations Management Association. Rui has extensive experience in conducting case-based research and in teaching the case study methodology to PhD students. He has taught courses and seminars on the case study method internationally, including at the European Institute for Advanced Studies in Management (EDEN Doctoral Seminar in Research Methodology, EIASM, Brussels), Haskayne School of Business (University of Calgary, Canada), University of Exeter (UK), University of Surrey (UK), Catholic University of Rio de Janeiro (Brazil), and the Decision Sciences Institute Annual Meeting (US). He has taught at the London Business School, London School of Economics and in the major Portuguese Business Schools. His present research interests include service operations, digital economy and operations strategy. Rui is Full Professor at Catolica Porto Business School and director of the Service Management Lab.*