

# College-to-Conglomerate Case Development Approach: Experiences of the CGU-FPG Project

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## ABSTRACT

*Case write and experience are very popular in the course teach, this paper presents the history of the CGU (Chang Gung University)-FPG (Formosa Plastics Group) multiple-case development project and benefits of the C2C (College-to-Conglomerate) case development approach. The approach provided benefits that were seldom available to individual case development. First, strong supports in data availability and finance fueled the developmental process. Second, the systematic structure of the developmental process improves the process smoothness, convergence and quality of outcome cases. Finally, the scholarly synthesis improves the quality of outcome cases. We believe that the process of writing and teaching of each case will be acceptable to everyone.*

**Keywords:** Case development, Chinese management, Chang Gung University, Formosa Plastics Group

## INTRODUCTION

Cases are well-recognized as important pedagogical materials (Valentin, 1996; David, 2003) and case writers have devoted to writing high quality cases for pedagogic uses. However, few papers addressed how to develop high quality case and how to solve problems faced by case writers. Thus, this paper presents the history of the CGU-FPG multiple-case development project (the Project) and the benefits of the recommended C2C case development approach (the Approach). Experiences from the Project were used to recommend case writers to take advantage of the benefits of the Approach. Some part of revenue comes from National Science Council. The results can promote us to think of teaching can be helpful to all learners.

## LITERATURE REVIEW

The case method is pervasively regarded effective in management education. Case teaching was introduced to the business school environment in the early 1900s at the Harvard Business School (Garvin, 2003) and found producing more effective learning than lecture learning does (Bocker, 1987) and prevailing in management education of multiple disciplines. The cases are “the marketing educator’s most popular tools” (Valentin, 1996,) and case analysis “is typically the backbone of the learning process in most strategic management courses” (David, 2003). Additionally, case analysis also aids in the development of cross-functional curriculums (Crittenden, 2005). The reason for the usefulness of cases may be that cases can expose students to various managerial issues and the role of decision making. Not only case analysis can improve student’s learning, but SWIF (student written-instructor facilitated) case writing is also one efficient way for management education (Bailey et al., 2005).

In accordance to the usefulness of cases, experienced case writers provided guidance for writing high quality cases. Herreid (1998) described the components of a good case as telling a story which focuses on an interest-arousing issue, sets in the past 5 years, we can also create empathy with the central characters including quotations, having pedagogic utility, having conflict provoking, being decision forcing, having generality and being short. Based on 20 years of experience, David (2003) provided valuable suggestions on case writing: I wonder this file may be studied:

- Selecting an appropriate organization which is real in all levels, undergoing strategic change, currently in the news, doing business globally, containing available financial statements, running in industries that students are familiar with or interested to.
- Using secondary rather than primary data for the sake of time-consuming publication permission and (biasing) modification made by top managers.
- Being comprehensive (containing enough information) in its coverage of functional business areas and external issues and trends.

Moreover, multiple cases can be simultaneously utilized for research. Eisenhardt (1989) provided suggestions for conducting multiple case studies, selecting cases, advancing and testing theories via comparative analysis.

Given the usefulness of cases in management education and the case-writing guidance, few of past studies addressed how to develop (prior to write) high quality cases and how to solve problems faced by case writers. New coming case writers may improve their case development skills by learning from guidelines provided by Herreid (1998), David (2003), Eisenhardt (1989) etc. However, the learning process may be less efficient due to long developmental duration of cases. Furthermore, selecting an appropriate organization as suggested by David (2003) may be easier than gaining permission and full supports from the chosen organization, limiting the accessibility of the primary data in all functional business areas of the chosen organization.

Additionally, case developers usually face the problems on data availability and multiple expertise requirements. First, case developer may wish to have first-hand, nominated, original and detailed data to vividly construct decision-making scenarios. However, those data is often regarded as sensitive or confidential to the chosen organization, resulting compromised resolutions such as ranked, summated or artificial data. Second, business situations are often multi-faced, requiring multiple expertises to depict vividly. However, not all scholars have multiple expertises in considerable depth to fully capture the features, problems, and secrets behind the target organization.

Furthermore, case writing counts little toward promotion or tenure at most colleges and universities because cases are not generally accepted as publications in academic journals (Valentin, 1996) although AACSB accreditation guidelines suggest that cases published in refereed periodicals, such as Case Research Journal, are certainly worthy of recognition, as are cases published in books (American Assembly of Collegiate Schools of Business, 1993). The lack of incentives for case writing is one of the major reasons for case shortage while the other reason is the length of time and effort involved in writing a good case (Fry & Wholihan, 1986). Additionally, the case writing process requires creative ways to coordinate (Crittenden, 2005) and the needs for cross-functional cases were also reported in Journal of Business Research (Crittenden & Dickson, 2005). Thus, having a “good” case developmental process or approach may solve problems faced by case developers, facilitate case formation and improve case content quality.

This paper thus recommends the Approach, which was extracted from the experiences of the Project, to provide a possible solution for aforementioned problems around case development. Since the Project is critical in the explanation of the recommended C2C approach, this study will then elaborate the Project, describe the benefits of the Approach and then make concluding remarks.

## **THE CGU-FPG PROJECT**

This section will first introduce CGU (Chang Gung University), FPG (Formosa Plastics Group) and then introduce the history of the CGU-FPG Project.

Chang Gung University was found in 1987, comprised College of Medicine, College of Engineering, and College of Management, and enrolled approximately 6000 students in 2005. Research performance (in terms of publications per Ph.D.) of CGU ranked the second in Taiwan in 2002 and 2003. College of Management (the College) was the initiating and executive unit in the CGU-FPG case development project.

The leading firm of Formosa Plastics Group (the Conglomerate), was founded by president Wang in 1954. Formosa Plastics Corporation significantly contributed to Taiwan’s economic growth and created numerous firms operating in related businesses that comprised the Formosa Plastics Group. FPG has then reached to different businesses on petroleum, natural gas, chemicals, fibers, hospitals, motherboards, automobiles, optoelectronics, biotechnology,

marine transit, freight transport, golf course, enterprise resources planning systems, environmental technology, and also had three schools including CGU. President Wang has several frequently-cited values in business operations: diligence, perseverance, frugality, trustworthiness, rest in the highest excellency, sustainable operation, and feedback to the local community. The values are longstanding and attracting numerous Taiwanese entrepreneurs to follow those values. So far, president Wang was past(Mo, 2008), but FGP including CGU had given him the most respect.

In 2000, Dr. Thu-Hua Liu formulated the proposal of the four-year CGU-FPG case development project which has named "Case Design and Instruction Methodology for Current Management Education" for the sake of preserving the business wisdom embedded in FPG business operations. The Project gained financial supports from Ministry of Education in Taiwan and CGU and began in September in 2001 and ended in August in 2005. Dr. Sou-Shan Wu, the dean of College of Management in CGU, directed the execution of the project. Thirteen PhDs with various academic expertises in College of Management in CGU joined in the project as co-project implementers and produced 58 Chinese management cases in 10 main themes: finance, human resources management, operations management, marketing, information management, virtual education, medical product design, consumption product design, hospital reactive strategies to governmental health policies, and hospital crisis management. Some of outcome cases were known published (Chen & Chang, 2004; Chen, Chen, & Chen, 2005; Chen & Lu, 2005; Chen & Hu, 2004) and all outcome cases have been ready and used for educational uses. Details of developed cases are available at Teng et al. (2006).

The Project gained the acknowledgement of president Wang and thus FPG provided full support in data availability. The cases were developed on time with satisfactory quality and the experience was then extracted as the C2C case development approach.

### **BENEFITS OF C2C APPROACH**

Benefits of C2C approach can be categorized into three parts: strong support, systematic structure, and scholarly synthesis.

#### **Strong Support**

The first type of benefits from C2C case development approach is strong support. Ministry of Education in Taiwan and CGU offered sufficient financial supports. The combinational financial support is usually stronger than that is available for individual researcher.

Sufficient funds are precious, but the full data disclosure is much more valuable since the trust of business on researchers is fragile and cautious. Even when businesses trust in researchers, businesses are still afraid of harms from careless reveal of confidential information, reducing the willingness of businesses to provide the complete and uncovered data. In the Project, the highest management has the determinations to disclose and preserve the secrets of Chinese businesses' management to CGU. Being supported by the highest management, the Project gained the nearly full data access to all units in FPG that is scarcely available to most case developers.

The C2C approach provides another type of benefits: sincere and in-depth cooperation. The case developer may have conflicting interests with the target organization in the aspect of data disclosure in cases. In the Project, the conflicting interests are non-existent because CGU and the target organizations are all in FPG. They are all possessed by the president Wang and have similar interests. The growth of target organizations provides stronger support to CGU and the reputation of CGU on the other hand improves the reputation of the whole FPG. Thus, the cooperation in case development process could be sincere and in-depth.

With similar interests, the target organizations assigned the suitable contact persons and provide them sufficient power to contact CGU. The right person knew the target organization in-depth and was willing to provide helps in case development.

C2C approach also possesses another type of benefits: economics in contracting. The contract only costs CGU only once for developing multiple cases in FPG that is economic for case developers who are less experienced in contracting with target organizations.

To sum up, C2C approach provides strong supports such as sufficient funds, superior data availability, sincere and in-depth cooperation, suitable contact person with sufficient power, and singular contracting effort for development of multiple cases.

### **Systematic Structure**

Case developers grows when they gets more and more experienced. However, they are seldom guided or supervised in the learning process. The C2C approach amends the flaw. The dean (of College of Management, CGU) supervised the whole process and ensured interactions among all case developers. Less-experienced case developers learned from others and from the feedback of the dean, improving the quality of all cases.

Case developers may also suffer from heavy duties and distractions and thus delay the case development process. C2C approach also avoids the unfavorable outcome. The dean supervised the whole process and had clear and specified objectives, forming the pressure for case developers to concentrate in developing cases on time.

Case developers may also suffer from the pressure of publishing academic papers. In some of universities, quality and quantity of journal papers are the prominent evaluation. Cases for educational usage are not on the way. Thus, case developers are less motivated to develop cases with good quality in such systems. C2C approach can also alleviate the shortcomings. The dean motivated the case developers by including the quality and quantity of cases into evaluation system. Thus the case developers were more motivated to devote their time and efforts to write good quality cases.

C2C approach also provides another type of benefits that were seldom available for individual case developer: summarizing and convergent documentation. The dean has an overview of all cases in various disciplines and has the power to modify the developmental directions of cases to ensure the convergence of all cases.

To sum up, C2C approach provides a systematic structure offering a supervised process, specified objectives, staff with strong motivations, and summarizing and convergent documentation.

### **Scholarly Synthesis**

Single case developer can gain constrained scholarly synthesis from discussing with colleagues. However, C2C approach allows the much more synthesis by having more than one dozen scholars in multiple disciplines to meet monthly. Thus the sharing of multi-disciplinary views dramatically upgraded the comprehensiveness and usefulness of case contents. With the monthly meetings of scholars in multiple disciplines, multiple aspects of one firm can be uncovered and addressed in cases. C2C approach further allows symposium on case writing techniques, improving the ability of young faculty to write cases. The benefit of scholarly synthesis of C2C approach may facilitate the development of cross-functional cases, answering the call of Crittenden (2005). The scholarly synthesis helps case writers to realize their data's potential to do interpretive case analysis, reducing the data underutilization problem pointed by Valentin (1996,). Hughes (1978) proposed that the difficulty in finding good cases is a major problem. The C2C approach may allow multiple-disciplinary view on finding suitable target firms for developing potentially good cases, partially solving the problem proposed by Hughes.

## **GENERAL DISCUSSION**

The C2C case development approach was found beneficial because the approach provided benefits that were seldom available to individual case developer.

First, the strong supports, especially in data availability and finance, fueled the development process.

Second, a systematic structure ensures the process smoothness, convergence and quality of outcome cases.

Finally, scholarly synthesis improves the quality of overall cases; even there is so much budget supported by Department of National Education.

The key success of the successful experience of C2C approach implemented in the CGU-FPG case development project is the support from the president Wang of FPG and the leadership of the dean, Dr. Sou-shan Wu of CGU. The determination of leaders of both FPG and College of Management of CGU results in the fruitful outcomes of 58 Chinese management cases.

Fry and Wholihan (1986) proposed two reasons for the case shortage: (1) the length of time and effort involved in writing a good case and (2) the lack of reward system for case-writing endeavors. The recommended C2C approach in this study can provide strong supports, considerably reducing time and effort in case development and writing. The C2C approach also has a systematic structure in case development, incorporating rewards in evaluation system for case-writing endeavors. The C2C approach further generates scholarly synthesis, improving case quality and indirectly reducing efforts required for writing good cases. Crittenden (2005) asked schools to creatively think about the best way to develop and coordinate the case writing process. The C2C approach in this study may be one of the best ways.

Additionally, by the early 1990s, management education had begun receiving criticism for functional orientation (Bennis, 1992; Linder and Smith, 1992). The C2C approach can create scholarly synthesis, potentially modifying functional orientation to cross-functional orientation which was suggested by Crittenden (2005).

This study suggests future that the case developers are to seek for the support of their college firstly. The second step recommended is to seek for the support of the head of one conglomerate that is willing to support. Utilizing the C2C approach to develop cases can gain benefits of strong supports, systematic structure, and scholarly synthesis.

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