

PREFACE

THE ARGUMENT FOR CASE STUDY RESEARCH

Case studies have so many advantages for writers, readers, researchers, and educators; it is such a shame that most academic assessment systems give them so scant credit. For writers, there is an enormous freedom. No iron-clad rules exist about form when writing a case study, no limits to topics or frames, often even the loosest of length restrictions. A glance at the table of contents of this volume of business-to-business case studies illustrates this freedom.

The case study author can choose to write in a formal manner, very similar to an academic research paper or in a casual, story-like manner. Arch G. Woodside, in his chapter about developing a general theory of behavioral pricing, chooses a formal, research-paper style. In stark contrast, Roger Marshall and Poh Tze Peng write their case study, about the development of a business-to-business online trading exchange, almost as a novelette; a simple story narrated simply.

Length is typically restricted by academic journals, and it is hard to find a journal home for any paper under 5,000 or over 8,000 words. Yet Michael Kleinaltenkamp, Ronny Behrens, and Stefanie Reh in their chapter communicate a very powerful message about the political hooks that decision makers need to recognize when a foreign company competes with a domestic business – they require only 3,500 succinct words. On the other hand, the virtues of a “thick description” are widely extolled for ethnographic studies, but how can such a comprehensive, meticulous study be contained within 10,000, or even 12,000 words? Catharina von Koskull uses over 16,000 words in her fascinating study of the uses made of customers’ information when a bank sets up a new online interface.

This book carries a theme, of course, it is all about businesses trading, relating and competing with other business; but within that frame what a scope there is for topics! Even within this modest collection topics span Internet trading, business-to-government marketing, banking decisions, trade fair interactions, behavioral pricing, and manufacturing flexibility.

A similar story is told of the methods embraced; indeed, there seems no limit to method. It is a common misperception that case study research is

qualitative. That this need not be the case is illustrated in their chapter by Sharon Purchase, Sara Denize, and Doina Olaru, who argue the case for case studies as a platform for agent-based modeling, through Suresh C. Sood and Hugh M. Pattinson's suggestions in their chapter about case-based netnography and behavioral informatics, to Wen-Hsiang Lai and Roger Marshall's use of quantitative survey and fuzzy logic data within his case study.

For the reader, there are also great benefits to case studies. It is well documented that business people relate far more strongly to "vivid" information than to statistical (Kosslyn, Ganis, & Thompson, 2003). Vivid, in this information processing context, implies that the reader has sufficient existing memory nodes that the new information triggers a strong mental image. Thus, a typical businessperson confronted with a decision is far more likely to listen to anecdotal evidence from a fellow-businessperson speaking on the golf course than to statistical decision support information in the office. Many managers simply do not relate to "dry" statistics; do not have the mental imagery to translate the numbers into a decision, but they do strongly identify with a story told about a decision situation even slightly similar to theirs. Case studies have an advantage over conventional research reports that many of those reading a case study can form mental representations within their cognitive system, connecting the situation in the case to their own, and helping them to reach insights into their particular decision circumstance.

Thus, for instance, Thomas Mejttoft in their chapter discusses survival in the printing industry. Any businessperson whose business is threatened by technological advances will immediately respond to the very vivid imagery triggered in their mind. Similarly, in their chapter Juho-Petteri Huhtala, Pekka Mattila, Antti Sihvonen, and Henrikki Tikkanen discuss another situation where survivalist competitive actions impede innovation flows through and industry. A drier report of a research project that carries the same message as these will simply not engage the reader the same way – what businessperson has not encountered self-serving competitive behavior that disadvantages the whole marketplace and all those within it?

Finally, other than advantages for the author and the reader, good case studies are both environmentally valid and academically rigorous. The trade-off is with generalizability, which is sacrificed by setting research into a particular situation; but that same placement shows clearly the applicability of the theory or idea in the circumstance described. So,

Kleinaltenkamp, Behrens, and Reh describe a situation where existing business relations and their binding effects influence subsequent behavior. In their case study, in spite of a superior product offering by a new potential supplier, the incumbent wins the contract. This outcome is clearly not a generalizable truth, yet undeniably this occurred within the particular relationship described in the case study and the cause and effect within the situation are very clearly defined.

Woodside and Wilson (2003) explain how case studies can achieve a deep understanding of processes. Processes can be as (apparently) straightforward as a contract negotiation (chapter titled “The Parable of a Little Research: Making Money from an Internet Trading Portal”), online management of a major account (chapter titled “New B2B Methods, Techniques, and Technologies for Capturing Insights of Major Account Managers: Developing B2B Communities for Energy Supply”), photovoltaic innovation (chapter titled “Factors Driving Manufacturing Flexibility: The Taiwanese Case”) or survival in a technology-threatened industrial sector (chapter titled “Building Relationships for Survival: Copying Media Industry Dynamics”); case studies such as these can reach below the surface occurrences to identify the motivations of the players that determine the sequence of events.

Academic rigor in case study research is often attained by using multiple sources of information, multiple methods, to offer triangulation focused upon a single outcome, or process (Woodside, 2010). This is clearly discernable in most the methods used in the cases in this volume. Examples from this case collection include decision system analysis, ethnography, and netnography, which all draw on multiple data sources including third party and participant observation, questionnaire responses, interviews, and document analysis. Other studies reported here use multiple analysis techniques, including comparative qualitative analysis, statistical analysis and geometric representation, all within the same study.

THE CASE STUDIES IN THIS BOOK

There are 13 cases presented here. Each is quite different from the others, having unique mixtures of topics, methods, and purpose. This creates a good illustration of the richness of case study research, but makes it hard to cluster the chapters meaningfully. Nevertheless, an attempt is made.

Short-Form Storytelling

The first four chapters contain a case study that simply tells a short story. Chapter titled “Deal-Making Negotiations by Governments and Major Product Suppliers: A Case Study of the U.S. Department of Defense and Airbus versus Boeing,” the first case study, is the shortest in the book and the only case using entirely secondary data. Kleinaltenkamp, Behrens, and Reh discuss the situation of Boeing and Airbus vying for a major contract with the US Government. The twists and turns of this case are quite fascinating, and the message that emerges from the analysis speaks of the negotiation power of the incumbent business partner. All the data is sourced from public records but assembled to tell short, pithy, and insightful story.

Chapter “The Parable of a Little Research: Making Money from an Internet Trading Portal” is yet more simplistic. The story, set in Singapore, that Marshall and Poh tell is how some very simple, typical, marketing research enabled a few inexperienced young men to turn a hobby Internet portal into a paying business-to-business trading company. The story is narrated in an informal, casual style, yet holds a fundamental truth. The marketing research conducted was typical of off-line endeavors, yet served very well within an Internet setting. Underlying whatever research is conducted there is an imperative to understand how relationships can be established and value added to them over time – this is the very essence of business-to-business marketing.

The third story-telling case study, by Thomas Mejtoft, explains about how both vertical and horizontal relationships have cushioned the impact of new media on the printing industry in Sweden. This is a story of business survival, which again hinges on value – both tangible and intangible – in business relationships.

Huhtala and his colleagues, in Finland, are interested in a related phenomenon. They first began to investigate the flow of innovation through the advertising industry, but swiftly found themselves investigating barriers to diffusion. Using a variety of interview techniques, and iteratively referring to theory in a combining technique, they were able to identify the players in the industry network and also identify the blockages to innovation diffusion. Through constant reiteration and cross-referencing, the reasons for the disruption to the flow of ideas are identified as competitive, survival behaviors.

Longer Stories

Chapter “Using Discourse Analysis in Case Study Research in Business-to-Business Contexts” employs a more formal method, discourse analysis, to tell a longer story. This research is set in India and uses in-depth interviews to draw out beliefs, attitudes, intentions, and experiences from a very large sample of managers in that country, in order to explore the identity processes in Indian industrial networks. The analysis suggests what these social constructions mean for the management of buyer–seller relationships, and goes some way toward addressing the dominant Western perspective prevalent in most studies of business relationships. The analysis also shows how discourse analysis can provide a rich analytical perspective on business-to-business relationships.

Chapter “Ethnographic Research in Service Marketing: Theory, Methods, and Practice” is, by far, the longest in the book. Ethnography requires a thick description, and von Koskull provides such a description within the context of a bank designing and building a new Internet interface. The fieldwork took over one year and generated a plethora of rich data. The author first describes ethnographic methods and data collection modes, then moves on to describe the fieldwork findings. Finally, von Koskull discusses validity, reliability, and generality of the method and her particular case, and the coping tactics she used to manage this very long study.

Cases Concerned with Theory Development

Woodside, in his chapter, uses inductive research to support theory. He first explicates the theory of behavioral pricing and then briefly describes a number of cases that support the theory. The methods for gathering data in the empirical studies are rich indeed; spanning a wide range from statistical hypothesis testing, through true field experiments to think-aloud methods. Woodside is able to conclude that behavioral pricing theory is distinct from context-free microeconomics, market-driven, and competitor-only price setting. This enriches and develops general theory to illustrate ways the managerial practice of pricing can be improved.

The eighth case study concerns theory development. Maria Sarmiento, Cláudia Simões, and Mino Farhangmehr gathered insights from practi-

tioners and exhibitors through direct observation, informal contacts, and interviews at business-to-business trade fairs in Portugal during one year of fieldwork. They conclude that a relationship marketing focus is critical to trade-fair participation, and are able to offer valuable insights to all parties to optimize the trade fair experience. It has long been understood that trade fairs are among the most powerful communication persuasion vehicles in the business-to-business kitbag, but this is the first study, as far as the authors are aware, that places relationship development and management at the heart of the trade fair.

The last of the theory-focused case studies is written by Spanish authors, Rubén Llop and Iñaki García-Arrizabalaga, and is particularly contentious. These authors write as consultants, and draw from a large number of recovery, turn-around, and start-ups that they have personally managed – this is, in a sense, participant observation. Their thesis is that when companies are faced with a crisis then they normally ignore competitive advantage and simply struggle to survive. These academics, however, believe that crisis provides a real opportunity to strategically seize the competitive high ground. Fifteen specific business cases are examined and a model developed from the analysis to support this theory.

Research Explaining the Use of Case Study Methods

The four remaining cases all focus upon method rather than theory. All are set in a case study frame, but show how different research methods can be used to advantage in different situations. These methods embrace decision system analysis, agent-based modeling, fuzzy set qualitative comparative analysis, and netnography.

First, in their chapter, Roger Marshall, David Bibby, and WoonBong Na revisit a decision system analysis (DSA) performed three decades ago, to update knowledge of advertising agency group decision-making systems. These researchers find that the industry has changed dramatically, and the whole process of campaign decision-making is now compressed and far more networked, as against the more linear form espoused earlier. New players are identified, but one of the most interesting findings is that the companies themselves are using a form of DSA to improve their performance. The methods of DSA are discussed and compared to alternative techniques.

Sood and Pattinson in their chapter present a cutting edge exposition of netnography, explaining the multiple methods that are typically bought to

bear to capture insights of online behavior. In this instance, their online case study vehicle is the sales activity required to create and manage online communities for major accounts of energy suppliers in Australia. The authors offer insights into how such a marketing network can be integrated into existing structures and give a broad guide to the complex business of optimizing the big data opportunities that assist in the management of the network.

Chapter “New B2B Methods, Techniques, and Technologies for Capturing Insights of Major Account Managers: Developing B2B Communities for Energy Supply” is a narrated story about how a Taiwanese academic, working as a consultant to the Government, conducted a wide-ranging study in order to help manufacturers attain more flexibility. The study followed typical consulting procedures, where a large sample of senior managers of manufacturing concerns served as an expert panel to advise the academic. What is unique in this case is that after gaining the groups’ acceptance of a hierarchical set of theoretical flexibility factors, these were rearranged as pictorial representations of fuzzy logic-derived plane surfaces, which were finally represented to the business managers as a set of ordered propositions designed to identify the key factors contributing to flexibility. There is empirical value in the case, but the research method is an interesting, layman-friendly, slant on a rigorous research method.

In the final chapter, Purchase, Denize, and Oluru address a gap in the methodology literature by including case data within agent-based model building processes. B2B marketing researchers are offered a guide to the processes and principles of using case-based data to build simulation models.

Do read and enjoy any, or all, of these case studies. If your imagination is caught by some method, topic or situation that is particularly vivid to you, then it is quite possible that you will see a solution to a problem of your own, be inspired to write your own case study, use a research method never tried before, or find a way in which your knowledge domain could be enhanced.

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Hugh M. Pattinson
Roger Marshall
Editors

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