Research-informed teaching and teaching-informed research: the Contemporary Marketing Practices (CMP) living case study approach to understanding marketing practice

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Abstract

Purpose – This paper aims to demonstrate how a Contemporary Marketing Practices (CMP)-based living case study approach can be used to enhance student learning, and to develop new theory about marketing practice.

Design/methodology/approach – The paper compares and contrasts teaching cases and research cases to create context. It then describes two examples of the living case study approach: one project directed at understanding the impact of information technologies (IT) on marketing practice, and the other at examining managerial understandings of customer value.

Findings – The study finds that a living case approach extends insight into antecedents and consequences of marketing practice, consistent with CMP research objectives. New conceptual frameworks for the IT adoption process and conceptions of customer value are co-created by executive students and the authors. It shows that managers are able contributors to theory development. The paper concludes that the living case approach provides a rich "zone of mutuality" between research and teaching.

Research limitations/implications – Action learning can be used in business schools to enhance theoretical and practical understanding of complex process-based phenomena.

Practical implications – The living case study is suited to post-experience students rather than undergraduates. In addition to considering the nature of the student body, faculty should also consider fit with their personal competencies and the curriculum prior to taking this approach. However, it should be done so advisedly.

Originality/value – The study stimulates reflection on alternative approaches to teaching and learning in executive education, and to theory development in marketing practice.

Keywords Case studies, Action learning, Marketing strategy

Paper type Research paper

An executive summary for managers and executive readers can be found at the end of this issue.

Introduction

This paper focuses on action learning, and specifically the use of "living" cases, which have the objective of enhancing student learning and developing theory contemporaneously. According to Bonoma (1985, p. 199) case research refers to the "qualitative and field-based construction of case studies", with the purpose of understanding targeted phenomena. In case teaching, on the other hand, instructors deploy a narrative of a particular business case (usually based on case research) to stimulate student analysis and evaluation of a complex management situation. Both are inherently different undertakings (De Jonghe, 2004). The "living" case study is an amalgam of both approaches. Working closely with executive students who are also practicing managers, the authors have developed cases relating to particular phenomena based on the managers' multiple and individual contexts and understandings. This approach has allowed managers to apply marketing theory to their own day-to-day contexts, and in so doing, to enhance their learning. It has also allowed for theory development relating to complex process-based phenomena.

The paper commences by reviewing traditional conceptions of teaching cases and research cases. We then describe two CMP "living case" projects, the first directed at understanding the impact of information technologies (IT) on marketing practice, and the second at examining managerial understandings of customer value. Finally, we draw conclusions and consider implications for teaching and for research from these experiences.

Background

In a recent address to the North American Case Research Association (NACRA), Michael Porter offered strong support for a pluralistic, multiple lensed approach. He noted:

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> We need to keep this balance between rigorous methodology based academic work and case research - in-depth, longitudinal case research. Without this balance, we will never make progress in this field . . . This doesn't mean that every one of us has to do both. It means that we have to have a creative, supportive, mutually respectful group of people who take different methodological cuts at . . . every management discipline (Porter, 2006, p. 2).

Referring to his own experience in influencing the fields of strategy and management, he called for a synthesis of different types of work, and in particular for a synthesis of case research, theoretical and empirical work. We consider this to be a strong call for integrative, synthetic research, and support for the CMP approach. In this spirit we offer our experiences in taking a "living case" approach to research, teaching and learning, in the hope that it will support colleagues in similar endeavors, and stimulate debate.

What is a case?

The term "case" has wide application. Case research and case teaching are generally viewed as the "doing" of research and teaching, using a particular approach or method. Chetkovich and Kirp (2001)D, p. 61) describes case research as ". . . exploration of a 'bounded system' or a case (or multiple cases) over time through detailed, in-depth data collection involving multiple sources of information rich in context.". In general, the case research process requires articulation of a research question, definition of case boundaries, then gathering appropriate data to inform that research question (Cresswell, 1998). On the other hand, Fry *et al.* (1999, p. 408), describe case teaching as entailing ". . . student centered activities based on topics that demonstrate theoretical concepts in an applied setting". In marketing education this usually involves a description of a business situation, requiring students to identify and solve general or specific business problems embedded in that situation.

While these definitions of case deployment seem straight forward, the term "case" is used broadly, and some would argue loosely (De Jonghe, 2004; Ragin and Becker, 1992; Yin, 1994). It is used, for example, to describe an organization – "The case of Acme Limited"; to describe a phenomenon or specific topic – a case of food poisoning, a case of salmonella; to give an example – "In this case . . . "; to describe a research methodology or method – "case research methods were used"; to describe a teaching approach – "case teaching methods were used"; or describe an artifact – "The Acme Limited Case" (De Jonghe, 2004). In view of this range of alternative terminology, care is required in order to ensure clarity of meaning.

We proceed by discussing relevant aspects of case research and case teaching, to provide a conceptual basis for considering the contribution of the living case study approach to theory development and student learning.

Cases in research

In case research, a research question or problem (usually a "how" or "why" question) is informed by studying a phenomenon in a bounded context – i.e. a "case" (Creswell, 1998; Yin, 1994). The result is an artifact – a written case – which provides both description and theory (first and second order effects) relating to the phenomenon studied (Miles and Huberman, 1994). Use of the case method is now well-established in the management disciplines: "[case study] method should be part of a social scientist's complete armamentarium." (Yin, 1994, p. xi). In this sense case research is a scientific method used to inform a view of reality and to enhance knowledge. Its strength resides in "[moving] marketing scholars closer to marketing managers, while laying a clinical foundation for advancing marketing knowledge in new and significant areas" (Bonoma, 1985, p. 206) – notably also the motivation for the CMP research program.

The scope of case research is broad. It is conventionally placed in the interpretative rather than positivist frame (Brown, 1995), and generally directed at discovery of new theory or in the development of existing theory rather than testing or justification of existing theory (Hunt, 1983). However, some leading advocates of case research are recognizably positivistic. For example, Yin's approach to case study research "favors the emulation of the scientific method... the conduct of quantitative or qualitative analysis (or both) depending on the topic and research design." (Yin, 1994, p. xvi). As Table I illustrates, case study methodology can address a wide range of research problems and research questions, resulting in a range of projects and purposes.

Applications of case research can thus range from exploratory research, scoping opportunities for theory development, to confirmatory research testing generalizability of existing theory. Case research is therefore broader in scope than the conventional view would suggest, and not necessarily limited to interpretivist research and qualitative approaches.

In case research, as in any research endeavor, quality is important. Case researchers are expected to develop research designs appropriate to their epistemological and ontological positions, and to answer the question "why should we believe it?" in a manner commensurate with the stated or implicit research paradigm. Depending on the project, criteria for assessing the quality of case research can include "objectivity/confirmability of qualitative work, reliability/dependability/auditability, internal validity/credibility/authenticity; external validity/transferability/fittingness; and utilization/application/action orientation." (Miles and Huberman, 1994, p. 277). We would therefore expect any case research endeavor to include appropriate quality criteria, and to respond to those criteria.

We now compare and contrast case teaching with case research, preparatory to examining the CMP approach to integrating both in "living cases".

Cases in teaching

A teaching case is a written description of a decision, challenge, opportunity, problem or issue faced by an organization (Mauffette-Leenders *et al.*, 2001). Teaching cases vary in complexity, from single snapshots of individual firms in one-off situations, to representations of many firms and issues over time (Barnes *et al.*, 1994).

The dominant model of case-based teaching is that of the Harvard Business School, whereby an instructor orchestrates discussion in a semicircular, tiered classroom (Griffith, 1999). General principles of management theory are embedded in vivid case narratives describing business problems. Students are required to analyze these narratives and to use evidence to support their interpretations, solve the problem, and to produce appropriate conclusions and recommendations. Teaching cases usually consist of two components: a case description, and a set of teaching notes provided by the case

Table I Matching research purpose with research methodology

Purpose	Research question	Research methods
Exploration **Uncover areas for research and theory development**	Is there something interesting enough to justify research?	In-depth case studies Unique/exemplary cases Unfocused, longitudinal field study
Theory building **Identify/describe key variables**	What are the key variables? What are the patterns or linkages between variables? Why should these relationships exist?	Few focused case studies In-depth field studies Multi-site case studies Best-in-class case studies
Theory testing **Test theories developed in previous stages** **Predict future outcomes**	Are the theories we have generated able to survive the test of empirical data? Did we get the behavior predicted by the theory or did we observe another unanticipated behavior?	Experiment Quasi-experiment Multiple case studies Large-scale sample of population
Theory extension/refinement **To better structure theories in light of observed results**	How generalizable is the theory? Where does the theory apply?	Experiment Quasi-experiment Case studies Large-scale sample of population

Source: Voss *et al.* (2002)

writer (Lundberg and Winn, 2005). The case description encourages students to enter the world of a decision maker, for example:

> As David Strucke, CEO of Navtech, Inc. looked at his plans for the remainder of 2004, he realized that the decisions he and his management team were about to make would be critical to realizing the company's full growth potential (Nitsh *et al.*, 2005, p. 1).

Case materials provide supporting information of varying relevance, which students are invited to analyze, then to develop a diagnosis and appropriate business solution. Teaching notes can include key issues and theories, a synopsis, case objectives, additional reading material, suggested assignment questions, class flow, guidelines for discussion and class process, and an update on outcomes of the focal decision (Erskine *et al.*, 1998). In addition to the dominant model, other teaching case forms include "living cases" and "service learning" approaches. The literature yielded several examples – the use of an online auction as a means of demonstrating marketing theory in a marketing principles paper (Wood and Suter, 2004) the use of live organizations in a strategic planning exercise (Richardson and Ginter, 1998), and engaging with not-for-profits (Godfrey and Illes, 2005). In these examples the authors reported excellent teaching and learning results, with high student engagement and achievement of learning outcomes.

There are two major types of cases: decision forcing ("What would you do next?"), and retrospective ("Why did this happen the way it did?") (Paraschos, 1997). Cases may be further categorized by degree of analytical, conceptual and presentational difficulty (Mauffette-Leenders *et al.*, 2001). In the case of analytical difficulty, the degree depends on whether the core problem and/or solution is presented to students. For example, a case with a low degree of analytical difficulty might be:

> Roger Palmer sat at his desk, wondering whether his decision to enable customers to buy direct through the internet had resolved the problem of channel conflict.

On the other hand, in a case with a high degree of analytical difficulty, students are required to diagnose the core problem and develop solutions. For example:

> Roger Palmer was concerned – sales volume for his best line was 10 percent down over the last six months, even though the product category was growing.

Conceptual difficulty relates to the number and complexity of theoretical perspectives used to inform case resolution. Thus, a case with a low degree of conceptual difficulty may only employ one or two simple concepts, while a more challenging case would employ multiple and/or more advanced concepts. Finally, presentational difficulty relates to the weight and complexity of case information provided – whether short and simple or, at the other extreme, open-ended and from multiple sources (Mauffette-Leenders *et al.*, 2001). Using these criteria we can see that the living case and service learning examples cited above are at the challenging end of the continuum, being decision forcing (Paraschos, 1997), with a high degree of analytical difficulty (Mauffette-Leenders *et al.*, 2001) and with a high degree of conceptual difficulty (Mauffette-Leenders *et al.*, 2001).

In management education, case-based teaching is held to be useful (Stonham, 2001), and to appeal to both educators and students:

> Cases meet the needs of professional education … They convey wisdom gleaned from successes and failures and compensate for students' lack of real-world experience and knowledge, which is why business schools created them for aspiring CEOs (Kenney, 2001, p. 3).

Comparative studies suggest that learning outcomes for students are superior to conventional non-interactive lecture techniques, thus leading to a more intense learning experience and decreased social loafing (Bocker, 1987; Gudmundsson and Nijhuis, 2001). A further advantage is that case based teaching encourages both collaboration and competition. For example, in preparing for the case, students may collaborate in the analytic and diagnostic process. In the classroom students can compete for "air time" and instructor attention, particularly where participation is graded and where the instructor adopts a Socratic approach to teaching. "For case teaching advocates, intrinsic rewards are cited, i.e. that it provides... the innate joy of knowing one is doing as good a job as possible ..." (Erskine *et al.*, 1998, p. 318).

While case-based teaching offers advantages to learning, it also has its limitations. Case writing conventions have been criticized, in framing issues in ways that reflect orthodox points of view, and therefore support orthodox thinking (Chetkovich and Kirp, 2001). Another limitation is that the quality of student learning is dependent on the facilitation skills of individual instructors. Thus, while "the [case teaching] method has been perfected in theory and sometimes raised to an art form by skilled educators" (Griffith, 1999, p. 343), in the hands of less skilled or novice educators the converse may apply. The "dark side" of case teaching is a negative classroom culture, where instructors struggle to maintain dialogue and engagement, and students engage in non-constructive competition, possibly on the basis of quantity rather than quality of input. Furthermore, we notice that despite prodigious effort, some students cannot or will not contribute to in-class discussion, thus limiting the scope of discussion. There may also be issues of efficiency, in that sound case analysis may be more difficult to implement in larger classes.

Taking both the positive and negative aspects of case-based teaching; we consider the analogy used by Mauffette-Leenders *et al.* (2001, p. 4) apposite: "... cases are to management students what cadavers are to medical students, the opportunity to practice on the real thing harmlessly". We further agree with Paraschos (1997, p. 21) who argues that a teaching case "... is not a scholarly accomplishment, at least not in the sense of contributing new knowledge or insights, [however] it is a significant pedagogical accomplishment", and thus makes a useful contribution to management education and student learning. Thus, we hold that case teaching (in the normative sense) is an effective and engaging means of disseminating knowledge in the management disciplines.

Contrasting case research and case teaching

The key differences between teaching cases and research cases reside in function and purpose. The purpose of a teaching case is to stimulate student learning, while the purpose of a research case is theory development. The artifacts are respectively a narrative supplemented with teaching notes, and a scholarly work resulting in theory-building propositions and conceptual frameworks. We contrast the two approaches in Table II.

The key difference between research and teaching cases lies in the objectives of the researcher or writer, and the subsequent use of what is developed (Bonoma, 1985). Case research is a choice of research method, while case-based teaching is a choice of pedagogical approach (Paraschos, 1997). Purpose in turn dictates form and function – for example, a scholarly work replete with analysis that supports new theory development and learning, as opposed to a literary work replete with human drama, incomplete data, and other devices that support student learning.

While purpose and form of cases for research or teaching are very distinct, this does not necessarily imply these two endeavors are mutually exclusive. Rather, they can be seen as complementary activities and may even draw from the same source material. Both require a purposive and systematic approach. Both require the application of creativity in arriving at conclusions and in developing new knowledge or testing and exercising current knowledge about management practice or management theory. Whilst academic capability is required in both forms of case development, they differ fundamentally in their purpose and approach to theory: either a methodology to build or test theory in a rigorous manner, or a pedagogical technique that illustrates theory by adopting a narrative approach intrinsic to which is student engagement and participation. In addition, different quality criteria apply: case research is required to be rigorous and valid, whilst a teaching case must deliver against the teaching objectives. Internal consistency, face validity, acceptability and comprehensibility for students are of primary importance.

We proceed by considering the nature of living cases, as undertaken by two teams of CMP group researchers.

"Living" cases: the CMP approach

The CMP "living case" approach builds on both case research and case teaching traditions, and creates direct linkages between the case or research site, learners and instructors. The case data are sourced directly from the students' own business contexts. They are encouraged to critically examine and reflect on these contexts or practices through a process of facilitated learning, to construct and refine theory to both interpret and explain these phenomena, and to provide a framework for managerial decisions and practices. We argue that the CMP "living case" approach satisfies a requirement for both research validity and pedagogical quality and is a "zone of mutuality", or the nexus between research cases and teaching cases.

The studies we report on here are part of the CMP research program, which is aimed at profiling marketing practice in a contemporary environment. Multiple methods are used. Quantitative methods provide wider context in the form of a profile of current marketing practices across different firm types and industries. Qualitative methods provide a deeper understanding of the nature of marketing practice, how these are changing over time, and the underlying reasons behind the changes. We argue that this pluralistic approach has facilitated the development of a more comprehensive understanding of the nature of marketing practice, and provides requisite variety – that is, matches the complexity and multi-dimensionality of the contemporary business environment faced by managers.

Two aspects of the projects we report on here are central to the CMP research approach: the integration of research with executive teaching, and the use of "living" case studies as a research vehicle. Unlike static teaching cases, CMP cases are "alive" and evolving, in that they are based on executive students" experiences in their own organizations. Our course and classroom process is therefore oriented more to action learning rather than conventional case teaching. Action learning is a problem-solving approach initially developed for managers in industry (Revans, 1998). A complex problem is identified, and then a defined group embarks on continuous cycles of action and reflection, in order to arrive at a solution. Action learning can be therefore defined as a process in which a group of people come together to help each other to learn from their experiences (Dick, 1997), or, in practical terms, " ... an iterative process of action, reflection, insightful

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Table II Comparing and contrasting research cases and teaching cases

	Research cases	Teaching cases
Discriminating characteristic	Research method	Pedagogical tool
Purpose	Advance theoretical knowledge Reduce the divide between the known and unknown	Advance student knowledge Reduce the divide between simulation (teaching) and reality (practice)
Motivation	Nature of the problem and its formulation Meet specific problem objectives	Classroom needs Meet specific learning objectives
Form	Description, analysis, explanation	Description (in student notes) Analysis, explanation (in teaching notes for instructors)
Characteristics of "good" cases	Factual and objective writing style, relevant, representative Sound analysis, chain of evidence Alternative interpretations and conclusions are identified, addressed and made explicit Relevant research quality assurance criteria are met	Vivid and concise writing style, relevant, real, involving, human Stimulates student discussion and learning: free of a priori conclusions and interpretations Flexible to allow analysis from more than one theoretical direction Sufficiently complete so as to require little extra factual elaboration
Illustrative types	Exploratory, descriptive, causal (Yin, 1993) Intrinsic, instrumental, collective (Creswell, 1998)	Decision forcing (what next?) Retrospective (why did this happen the way it did?)
Quality assessment	Internal and external validity, authenticity, confirmability, auditability, etc.	Student learning outcomes, learning process evaluation

questioning and assumption breaking." (Oliver, 2006, p. 214). Through this process new insights and new interpretations of existing knowledge can be delivered, resulting in positive cognitive and behavioral outcomes for both individuals and organizations (Marguardt and Waddill, 2004). An action learning philosophy and practice underpinned the research and learning process, entailing a collaborative (rather than distanced) approach by all participants, with the aim of both knowledge development and improvements to practice (Avison *et al.*, 1999; Greenwood, 1999; Perry and Gummesson, 2004). The researcher and several groups of practicing managers worked together on a cycle of activities over three stages, including problem diagnosis, action intervention, and reflective learning, co-creating knowledge and improving practice.

The research projects we discuss in this paper conform to the philosophy and process of action learning. Our philosophy is democratic, and we aim for collegial interaction in the classroom to foster mutual exchange of ideas and sharing of experiences, through fostering longitudinal, trusting and productive partnerships with our executive students. Our goal is to achieve positive outcomes for both theory building and managerial learning and our process is iterative, conducted over multiple stages, or cycles. An advantage of this approach over traditional case-based teaching is that the students' learning experience encompasses multiple contexts, both their own and that of other managers within the class. This enables constant comparison between their own and other contexts, and supports a wider appreciation of the influence of context on marketing practice. The level of engagement is high, as the focus is their own context. Furthermore, they benefit from rich information, as they draw upon input from colleagues within their firms, and also wider stakeholder groups (e.g. customers, distributors) during the process of inquiry, and also from fellow students' feedback.

To illustrate two applications of the living case method, Table III summarizes key aspects of two living case studies, one relating to IT adoption processes, and the other to customer value creation and delivery. These projects took place in a series of executive courses at the University of Auckland, New Zealand, and at Cranfield University, UK. A new cohort of managers is involved in each stage.

The two approaches are similar – both had an underlying action learning philosophy, both used a three stage approach, both commenced with a self-completion survey completed by executive students and based on their firms, and both built on this initial body of knowledge by taking a deeper iterative approach. In each case the managers were participating in MBA or post-experience executive programs, and taught by members of the research team. The managers were currently or recently directly involved with the daily operations of their organizations. In each case the survey encouraged managers to use a variety of data sources within their firms (including their executive colleagues and observation) to gather information. The standard CMP questionnaire was used, enabling classification of the managers' organizations on the basis of general approach to marketing practice (transaction marketing, database marketing, e-marketing, interaction marketing, and network marketing) (Coviello *et al.*, 2002).

The two approaches are also different – in each case the teaching, learning and research process was tailored to meet student requirements, curriculum requirements, the instructors' research interests, and personal strengths and weaknesses. This is an advantage of the living case approach, as it offers a flexible approach to creating knowledge and achieving learning outcomes based on available resources, and the teaching and learning environment.

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Table III Summary of approaches in two comparative living cases

Stage	Living case A	Living case B
Research focus	Orlikowski (2000) three-way IT classification construct IT adoption processes and e-marketing	Customer value creation and delivery
One (a)	149 executive students/managers, NZ and UK Standard CMP self-completion questionnaire, augmented with IT-based items Completed by managers in consultation with colleagues *in situ* in their firms, as a take-home assignment	152 executive students/managers, NZ Standard CMP self-completion questionnaire, augmented with IT-based items Each question framed with theory, discussed in class. Survey answered either in-class or as take home assignment in consultation with colleagues in their firms
One (b)	Results analyzed, reported back and discussed in-class	Results analyzed, reported back and discussed in-class
Two (a)	In-depth interviews with managers	Student project briefing, incorporating discussion of theory and implications for marketing practice Students conduct fieldwork in own firms, assessing and evaluating their firms' approach to customer value creation and delivery with support of relevant theory
Two (b)	Class-room discussion of stage two (a) findings	Individual discussion and feedback on project findings
Two (c)	Individual reflection on stage two parts (a) and (b)	Classroom discussion of aggregated results
Three	In-class focus group with key informants from focal firm in process of new IT adoption Creation of new frameworks for IT adoption based on these data	Longitudinal single firm case. Interviews, observation, workshops, archival analysis Series of cycles of investigation and reflection in close consultation with the CEO and management team
Key research outputs	Coviello *et al.* (2003) Brookes *et al.* (2004)	Little (2004)

We proceed by describing each of these living case projects in detail.

Living case study A: impact of IT on marketing practice

Living case study A was a three-stage undertaking, conducted in both NZ and the UK, and with a focus on the impact of IT on marketing practices. In stage one the standard CMP questionnaire enabled profiling of marketing practices across the firms of all the managers in the executive classes. Further items were added to assess the role of IT. A five-point scale determined current level of technology use, and expected level of technology use in five years' time. Respondents were also required to explain the role played by IT in their organization by selecting and explaining the most likely and appropriate of three options: reinforcing, enhancing or transforming (Orlikowski, 2000). The project thus required students to compare and contrast asserted and actual use of IT, including their reflection on expected and actual uses of IT in their organizations. The results were collated, summarized, then reported back and discussed in class.

The second stage used in-depth interviews and self-reflection. These managers had participated in the survey of their own firm in a previous class, and were taking a subsequent class to that in which the survey was undertaken. Managers were equipped with an a priori body of knowledge (the survey results from the previous class) upon which to reflect and to compare and contrast their own results from their research into their own firms. The researchers and managers benefited from shared knowledge and insights, further enriching the results and enhancing learning (Brookes *et al.*, 2004). The results indicated that managers were able to categorize their own firm's investments in IT according to the three Orlikowski (2000) categories, and to demonstrate various cognitive-affective responses to the organization's approach to IT and the role of IT in the organization.

The third stage was undertaken with another group of managers, in a small class setting (<20 students). Students explored the nature of IT adoption processes in more depth, through a single living case: a firm currently adopting a new form of communications IT. A student within the class was a member of this firm, and recruited his fellow managers into the project. This allowed the instructors and students to compare and contrast theoretical models of IT adoption against a live case of PDA[1] technology adoption. Executives from the case firm participated in an in-class focus group, and these findings were applied by the students to extant conceptual frameworks. The students then developed their own interpretations of the IT adoption process based on extant theory, their own experience, and the findings from the focus group (see, for example, Figure 1).

Several similar models were developed, all representing a synthesis by student teams based on their interpretation of the theoretical constructs and primary data from the focus group. All models were then presented back to the class by each student group, reflected upon and discussed by the class, and finally aggregated by the group into a meta-model (Figure 2).

The research and learning process was complex. Outcomes for research were a deeper and richer understanding of the pluralism of contemporary marketing practices, support for the Orlikowski (2000) three-way IT classification, insights

Figure 1 Student-developed conceptual framework of the IT adoption process

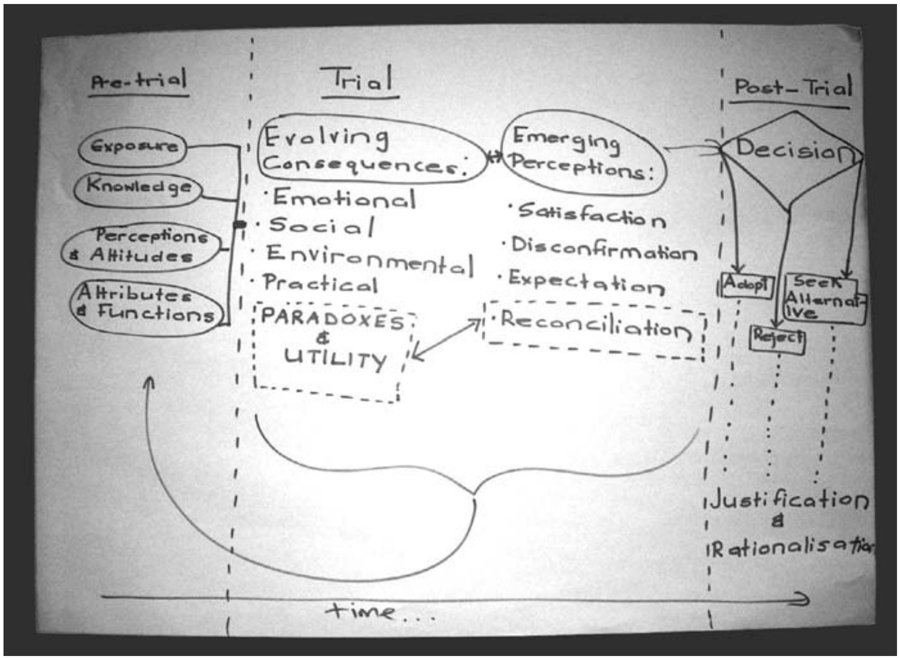
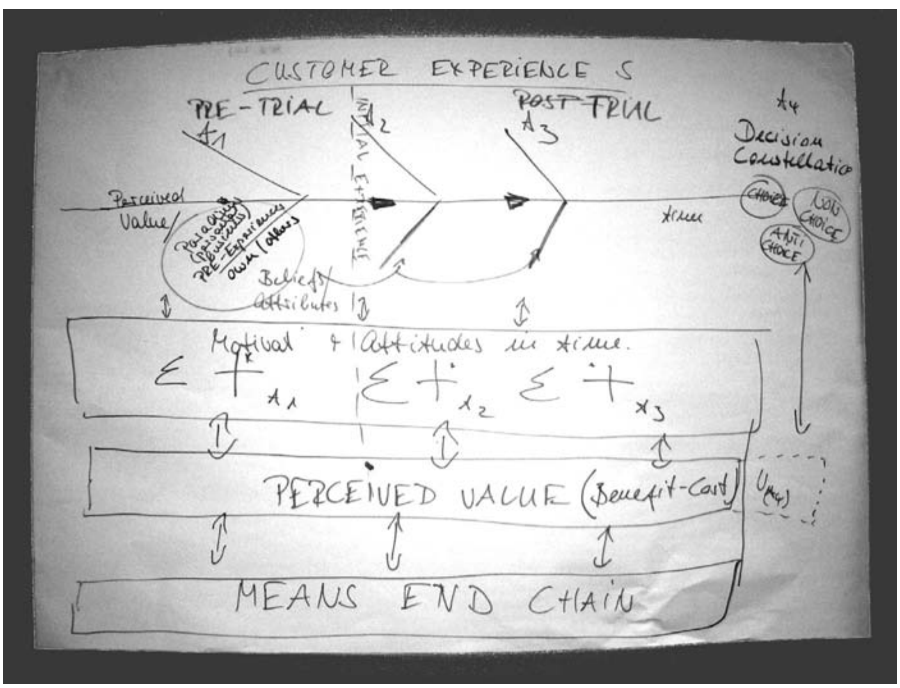


Figure 2 Student-developed meta-model of the IT adoption process



into the incidence and magnitude of IT adoption relating to marketing practice, explanation and rich description of the nexus of marketing practice and IT-enabled interactivity adoption rates, and deeper understanding of managerial attitudes and beliefs relating to IT adoption. Gaps in knowledge were identified, relating to marketing practice and change management theory. Additionally, refinement and enrichment of current models of IT adoption based on Mick and Fournier's (1998) paradoxes of technology framework was made.

Learning outcomes in stage one were greater understanding of the range, scope and inter-relationships of the different types of marketing practices (and especially e-marketing), the nature and influence of industry and firm context on e-marketing practice, and the influence of IT adoption on clusters of marketing practices. In stage two students learned about how IT-enabled interactivity in marketing is applied; why firms adopt (do not adopt) greater IT-enabled interactivity in marketing, and how improvements might be made to e-marketing strategy and practice, including change management implications. In stage three students learned how to diagnose and articulate real-world processes related to the organizational adoption of a specific IT, and how to link this new knowledge with existing body of knowledge (including theoretical frameworks) in order to construct a context-specific framework. The students also learned from hands-on experience how to run and process data from a focus group, and to conduct research into their own business practice.

Living case study B: customer value creation and delivery

The second living case study project was again longitudinal, taking place over multiple stages and multiple methods. The first two stages took place during a series of different executive classes, while the third took place within a firm, where the senior management team was comprised primarily of past and present executive students. In stage one the standard CMP questionnaire enabled profiling of marketing practices across all student firms in four larger classes. Further items were added to assess the managers' views of their firms' customer value creation and delivery.

In stage two managers in a smaller class assessed and critiqued their firms' approach to customer value creation and delivery. The cases were co-constructed, taking the form of written reports authored by the students and refined with the help of the instructor. The cases described and analyzed their firms' approaches to customer value creation and delivery. The cases were also "solved" by the students in the sense that problems were identified and alternative solutions or recommendations developed as outputs of the analysis process.

In the third stage the researcher entered a single industrial electronics firm headed by one of the managers in a previous class, and worked with the management team in that firm to understand (and improve) that firm's approaches to creating and delivering customer value. Notably, several managers within that firm had undertaken post-experience courses taught by the instructor. The case initially developed from discussions with managers, with the content of these discussions synthesized, refined, presented and discussed in two workshops designed to examine and challenge the firm's current practice. The "case solution" was arrived at consultatively by both the instructor and the managers over a period of some months, and took the form of new understandings and new approaches to practice.

The outcomes for research were further depth and description of customer "value postures" explaining alternative approaches to customer value creation and delivery. These postures were refined and developed over all three stages, resulting in "rich and thick" (Geertz, 1973) description of customer value creation and delivery. A series of conceptual frameworks articulating various approaches to customer value creation and delivery, were developed, including the identification of four types of customer value (Little, 2004; Little *et al.*, 2006).

Learning outcomes for participants were (among other things) an enhanced understanding of the influence of strategic choice on marketing practice, an appreciation of how approaches to marketing practice differ depending on industry and firm context, how marketing practice can create or destroy value for customers and other stakeholders, how marketing activities and processes integrate with other organizational activities and processes, and how marketing activities and processes integrate with other organizational functions. In both examples and over all three stages we found both researchers and executives benefited from shared knowledge and insights, enriching the results and enhancing joint learning. The process enabled discovery of knowledge gaps, stimulated on-going reflection and learning by both faculty and managers, and resulted in iterative knowledge building.

Discussion

The key to effective "living" case studies is to acknowledge and leverage from the experience of executive students and their organizations, building on the insights gained by "reflective practitioners" (Schon, 1983) whose knowledge can be accessed and formalized. This undertaking requires an appropriate pedagogical design that delivers real and perceived learning value to the students and other participants in the process, and a design that also delivers quality research outputs. Research quality is critical and should be validated against an appropriate set of criteria to ensure rigor and validity (Miles and Huberman, 2004). The CMP program has provided a philosophy and structure that supports both of these objectives, as evidenced by journal publications that have satisfied the rigorous peer review process.

Thus, rather than viewing a teaching case as a concrete and unchanging entity or established artifact based on third party organizations from a recognized provider (e.g. Harvard or INSEAD), a teaching case can be viewed as customized, "alive" and evolving according to the experiences of particular students in particular classroom cohorts. Students are provided with concepts and frameworks that they need to master in their courses, and these concepts and frameworks are progressively explored, through live application, observation and reflection, enabling an iterative approach to learning and knowledge development. The benefits are that the instructor/ researcher and students can explore the relevance and application of concepts and frameworks across the context of many different organizations.

The advantages of this approach over traditional teaching cases are fourfold:

1. students can have a learning experience in a variety of business settings that are directly relevant to them;
2. they can compare and contrast experiences in other business settings with their own;
3. they can use this process to construct their own frameworks and theories to describe their realities; and
4. they can consider the managerial implications for their own managerial practice of their deliberations.

Like conventional case teaching, successful application of the living case approach is contingent on the skill of the instructor. The instructor must create a priori perceived value for participation in the case process, ensure that value is provided, and also ensure that students perceive value from the process post hoc. Furthermore, as in any teaching and learning endeavor, the instructor must ensure students perceive fairness and equity in the process, particularly in allocating grades for cases (or assignments) that are to a large extent co-produced. In this respect it is important to ensure transparency throughout the process, that students are treated equally in terms of instructor input, and that there is no sense of bias or of being disadvantaged.

As with all research, ethical concerns must be addressed. Care must be taken to ensure confidentiality of data used for publication, and that there is no sense of compulsion to participate. It should be noted that two factors support integrity of the process: these students are not shrinking violets – they are mature managers who do not hesitate to challenge faculty on issues relating to perceived quality or due process. Secondly, we encourage an open questioning culture of learning, and take pains to develop democratic and collegial rather than hierarchical relationships with these students (ceteris paribus). A final point relates to sensitivity to confidentiality of proprietary information. Use of student sourced material is carefully negotiated to ensure researcher motivations and the implications for students and firms. Confidentiality is a difficult issue in highly competitive markets, particularly when markets are small and it is not unusual for managers from competing firms to participate in the same classes.

The level of involvement of students in the living case process can be viewed as a continuum – ranging from respondents to a survey instrument to empowered co-researchers. At one extreme, individuals are engaged only to the point of "ticking the box". However at the other extreme students enjoy actively engaging as co-researchers and colleagues, and are enthusiastic about furthering knowledge in general, in addition to their own learning. Overall, we have found that students are pleased to be involved, and take great interest in the research outputs.

These positive outcomes, however, assume two preconditions: that students are willing and able to embark on a journey of learning and discovery, and that there is sufficient latitude in the curriculum to allow for more innovative means of working with marketing information and understanding organizational settings. Our living case experience is primarily with a post-graduate diploma in business students – essentially a specialist marketing MBA. We have recently experienced quite different results with one class of generalist MBA students undertaking a core marketing course. Here the pressured environment of part-time study resulted in less willingness and ability to invest time in more open-ended (i.e. ambiguous) in-class projects. Furthermore, we found that the opportunity cost of this type of work can be coverage of core marketing ideas and principles. For this reason, we would not recommend using this approach in condensed marketing principles courses taken by part-time executive MBA students, who are undertaking several papers contemporaneously. The living case approach requires an inquiring, reflective approach, which in turn requires time to investigate phenomena and process those findings. It also requires an appetite for risk and ambiguity on the part of both instructors and students. Like any research project (or any creative endeavor for that matter), outcomes cannot be guaranteed, however the difference with the living case approach is the time and psychic energy required to generate and process results. This is antithetical to more transactional approaches to learning.

Conclusion

The experiences described here supports our argument that case studies developed for teaching purposes and case studies developed for research purposes are not mutually exclusive. The needs of both learners and researchers can be met contemporaneously, if the research and learning projects are designed and implemented effectively.

Significant value to faculty is created through high quality and timely data, supporting research outputs that can be progressively checked for face validity and relevance. As a corollary, value to students is created through the provision of an engaging "living" learning experience, enabling engagement in and application of theory, thereby creating enhanced understanding and greater perceived value. Using the living case study method managers' intuitive knowledge and experience can be accessed and used to inductively develop theory. A significant benefit of this method is that it is practice and practitioner driven, providing a close relationship between theory and practice, and providing the opportunity to produce theory that is both rigorous and relevant. The distinction between theory and practice is sometimes blurred. As Miles and Huberman (1994) in research case analysis note it may be "theory first or theory later", but the iteration made possible by competent practitioners and research capable teachers has the potential to offer both explanatory theory and best practice guidance.

As the CMP approach evolves it will lead to further living case study possibilities. Currently the authors are working on several projects. The first living case in this paper featured one approach to marketing practice, e-marketing. A further aspect of marketing practice, internal marketing is likewise of interest, which will lead to future living case study projects. A recent presentation at the World Congress in Action Research (Little *et al.*, 2006) proved to be useful in extending our interest in action learning and action research, with respect to developing and implanting processes that encourage critical reflection by both instructors and students. Action based inquiry is a relatively new approach in the marketing discipline that offers significant potential for understanding complex process-based phenomena.

As committed teachers we are always looking for alternative ways to create and construct knowledge. The CMP approach has provided this group of instructors with a means of creating "requisite variety" (Weick, 2007), that is, has provided a rich basis of knowledge on which to construct theoretical frameworks that acknowledge the complexity and multi-dimensional nature of CMP. The CMP framework has allowed us to enter the multiple realities of managers, offering both broad understanding based on multiple contexts, and richer embedded understandings based on particular contexts. It provides a continuous, flexible and effective approach to achieving positive outcomes for both managers and faculty, and an opportunity for researchers to be creative in their pursuit of quality knowledge. We conclude that the living case approach provides a rich "zone of mutuality", whereby the needs of both learners and researchers can be met.

Note

1 PDA (personal digital assistant) is a term for any small mobile hand-held device that provides computing and information storage and retrieval capabilities for personal or business use (Wikipedia).

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