

**BOOK REVIEW**

**FIELD CASEWORK: METHODS FOR CONSULTING TO  
SMALL AND STARTUP BUSINESSES**

by Lisa K. Gundry and Aaron A. Buchko  
Sage Publications, 1996, 138 pages

Reviewed by Reginald Litz, University of Manitoba

*Editor's Note: Although this book has been in print for four years, it has been selected for review by our Book Review Editor since it is a popular book still in wide use and it addresses issues which are central to SBIDA and its primary mission of engaging in field casework. This book and review fit nicely with the two previous articles on student consulting.*

**In Praise of Fieldwork: Integrating Theory and Practice**

About two years ago I began teaching the course in *Small Business Management* offered at our university. From the start, one of my core objectives was to integrate an element of experiential learning into the course experience. Over the past five terms I have attempted and, with varying degrees, succeeded in doing exactly that. Each term I have had my students study a local small business; to date the set includes a garden center, a specialty wild blueberry jam producer, an importer of crafts from developing nations, and most recently, a hydroponics operation specializing in sweet basil.

The experience has generally gone well. Students have learned a great deal. So have I, particularly as it relates to structuring the assignment. However, while I have learned much over the past two years, I nonetheless wish I had read *Field Casework: Methods for Consulting to Small and Startup Businesses* earlier in the game. The book provides instructors and students alike, with a basic framework for undertaking the nature of fieldwork assignments. In a nutshell, the book presents a rationale for fieldwork, identifies key elements of the task process, addresses the ever-present possibility of dysfunctional small group dynamics, and outlines the key tasks necessary for successfully completing a fieldwork project. In the review that follows, I will summarize the authors' thoughts on each of these elements, and include my own reflections, based on the past two years of fieldwork experience.

### Fieldwork -- Why Bother? The Pedagogy's Distinctive Advantages

A fieldwork-based assignment offers students several important advantages. First, it involves students directly with the real-life challenges faced by an actual business enterprise. Compared to other pedagogies, it seeks to facilitate a holistic encounter between student and subject, and thereby instill a deeper, more profound understanding. Done well, such efforts can be an invaluable learning experience. As one of Gundry and Buchko's students testified, "This project taught me more than all of my other business classes combined through four years of college" (1996: 112). The underlying rationale for such reactions are perhaps best encapsulated in an age old Chinese proverb: "I hear and I forget, I see and I remember, I do and I understand." Like Oliver Cromwell's admonition to his portrait painter, fieldwork demands that students engage, and 'paint' the organization, "warts and all." One of these warts arises out of the resource constrained nature of the small firm (Welsh & White, 1981), particularly as it relates to information. Over the past two years I have watched students appear somewhat stunned as they come to realize the inaccurate and incomplete informational limitations faced by the typical small business manager. Suffice it to say, such realizations come more slowly, if at all, when students engage the enterprise only in classroom and library.

#### If They Study It, Will They Learn? Understanding the Limitations of Fieldwork

While fieldwork experiences can offer much to participants, it is important that its inherent limitations also be recognized. In Chapter 2 authors Gundry and Buchko offer their thoughts on the nature of such limits. They observe that "certain cases just don't lead to good fieldwork experience. Among these are cases that are primarily clerical tasks or ones that require a highly sophisticated set of skills not normally provided by student consultants" (p. 17). However, an additional distinction is also necessary - namely, between assignments where the task is inherently unsuitable, and those where the task is inherently *unfocused*, owing in large part to a company's indecisiveness. My own experience confirms the authors' admonition. During at least one term, I observed a firm's managers being almost overwhelmed with their own operational concerns; these could easily have spelled student frustration had I as instructor not initiated a satisfactory resolution.

Having described the misfits, the authors also identify those tasks that more readily fit a field project. These include performing a feasibility analysis, developing a business plan, conducting a location analysis, testing a market for a new product or service, developing a new advertising strategy, and identifying possible sources of funding for growth or expansion. What is common to all is boundary definition; in each of these cases the student team has a relatively bounded task that lends itself to a focused team effort. As Gundry and Buchko assert, "do more work on fewer problems" (p. 23).

#### Getting Down to Work: Managing the Fieldwork Project

In Chapter 3 the authors discuss the practical steps involved in completing a fieldwork assignment. Typically the project involves three basic phases: assessment, implementation, and presentation of results. Assessment involves determining exactly what is to be done. In my experience, I have found that students need to be given broad, but explicit, boundaries in defining the assignment. This is important, as Gundry and Buchko note, because one of the most frustrating parts of the fieldwork assignment is its comparatively unstructured format. "Fieldwork projects," they note, "do not generally come in a 'ready-to-be-written' format. By nature, projects are often vague and ambiguous" (p.31). For some students this means nothing less than outright frustration. But sometimes such frustration can also be redeemed, as

students come to a deeper appreciation for how such vagueness and ambiguity is *the de facto* experience of many small business managers.

In terms of making first contact with the client, the authors recommend that the instructor not be present. I agree with their recommendation. Perhaps the most effective way to send students the message that this project is *their* project is to let them first encounter the firm on their own. In terms of defining the task, the authors recommend that the group work directly in identifying exactly what they will do. My own experience suggests that many times, particularly with undergraduates, it may be prudent for instructors to be slightly more directive. More specifically, what I have often done is identify a set of possible questions groups can address, and then permit each group to define their project's domain from the set. However, regardless of whether the students or instructor determine the assignment's boundaries three basic definitional parameters *must* be established early on: what the team intends to do, how it intends to do it, and what the team intends to provide to the client. This is essential if the project is to stay on track and also provide a basic standard against which the final output can be evaluated.

### **The Group From Hell: Thoughts on Managing the Project Team**

One of the potential drawbacks of the field work pedagogy can be the student's small group experience. In reflecting back on the dozens of small groups I have supervised over the past two years, and in particular the handful containing members that did *not* report a positive small group experience, I wish I had read Chapter 4 earlier. Whether it arises from role conflict, lack of motivation, or lack of assertiveness, instructors and students alike need to be forewarned of the possibility of intragroup conflict. Including this chapter, therefore, certainly strengthens the book's validity. What I found especially helpful was the authors' recommendation to appoint specific group members to fulfill specific task responsibilities; these include project manager, chief editor, financial analyst, and presentation coordinator. Reflecting back on one particularly confrontational group experience I witnessed, I found encouragement in their recommendation that instructors early on emphasize to participants the extent to which the project is also an exercise in social learning. Virtually all students will eventually be working in some variant of a group setting; for this reason, if no other, it is essential that people understand the importance of prompt attendance, initiative in volunteering, and timely completion of assigned duties.

### **Searching for Information, Developing Recommendations, Presenting Findings**

In the book's last two chapters the authors move on to discuss several practical tasks. The first is determining, and then locating, the information necessary for completing the assigned task. Gundry and Buchko provide a list of well targeted questions students are advised to review as they undertake this task. They also review some rudimentary elements of primary and secondary data, and survey-, questionnaire- and interview-based data collection; for marketing majors the chapter will be largely review. I found their advice on how to present a client with unfavorable findings among the most valuable elements of Chapter 5. The sixth and final chapter provides a basic review on how to prepare the final presentation. Here the authors appropriately stress the importance of a well conceived implementation plan, for if one fails to ask how the team's recommendations can become the firm's realities, the project essentially falls short of its desired effect.

### **Critique**

In a nutshell, this book is a concise and generally well written statement on the rationale and process of a fieldwork assignment. It is the kind of book I would consider including as a

optional reference text for students. However, I would also recommend it as required reading for all instructors thinking of including a fieldwork assignment in their small business or new venture course. I felt the coverage of the topic set was adequate and the writing style was accessible for the average undergraduate. In short, the book left me only more convinced of the value of fieldwork projects as this mode of learning facilitates a hands-on experience that may be otherwise inaccessible. As John M. Mason observed,

“The aim of education should be to convert the mind into a living fountain, and not a reservoir. That which is filled by merely pumping in, will be emptied by pumping out.”

If we as entrepreneurship educators are intent on facilitating the formation of *fountains*, rather than *reservoirs*, competence in the pedagogy of fieldwork is near essential. Simply stated, the “bottled waters” of textbook and classroom centered learning can satisfy basic thirst; however, if an effective education is about more than just satisfying basic thirst, and ultimately about transforming students into their own teachers, “living springs” strategies, such as fieldwork, have much to offer.

#### REFERENCE

- Welsh, J. A. and White, J. F. (1981) A small business is not a little big business. Harvard Business Review, 59(4), 18-32.

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