

Introduction

Why and How I Wrote the Book

This book grew quietly out of years spent inside change—sometimes as a participant trying to make sense of the turbulence, sometimes as a consultant or leader trying to create a little clarity for others. Looking back, I realize how often change felt less like a plan and more like weather: chaotic, unpredictable, unfolding in real time. I used to think the answers lived in better models or tighter strategies. Over time, I came to see something simpler and more humbling: Change happens in the *present moment*, in the small choices we make, in conversations we have, in our hesitations and experiments. That’s where the real work is. Not in the future we are anticipating and rehearsing and not in tidy stories about the past, but right here, where our generative creativity lives. Change is always emergent, even in carefully planned change initiatives, and we often move further by being present, staying curious, and working with what unfolds rather than trying to plan every step.

My doctoral studies introduced me to the foundational frameworks of organizational change, the theories, models, and research traditions that were intellectually grounding and gave structure and language to what I had been experiencing in practice. My research drew me toward the collective and social nature of learning and sensemaking, dialogue, and play as powerful ways people learn to navigate change together. But when I later began teaching organizational change to graduate students, a different question surfaced: Not just *What is change?* and *How change happens?* but *How do you teach it?*

I quickly realized that traditional pedagogy—lectures, slides, even well-crafted discussions—wasn’t enough to convey the messy, lived reality of change. Intuitively, I began turning to case studies and interactive activities, and something shifted. Learners didn’t just analyze change; they experienced it—wrestling with ambiguity, negotiating meaning, and testing decisions in real time. The response was telling: My learners often commented on how real the cases felt and asked where they came from—a signal that the learning was resonating at a deeper level. Only later did I recognize that this instinctive shift aligned with what scholars describe as *signature pedagogies*, or approaches that prepare people for professional practice through realistic, participatory learning (as discussed in Chapter 3).

At the same time, I kept noticing a gap. In both organizations and classrooms, most change work happens “in the trenches” (as discussed in Chapter 1), yet many available case studies focused on top-down large-scale change led by executives and consultants that learners and many practitioners cannot easily relate to. In practice, change is carried forward by middle managers, team leads, champions, and everyday employees through countless small actions that rarely make it into teaching case studies. This everyday dynamics of *micro-practices*—the awkward conversations, the workarounds, the false starts, the small wins—are where change really lives (Caldwell, 2003; Mesny, 2013). I wanted teaching materials that reflected that reality. Over time, it became less about collecting cases and more about articulating a pedagogy for change agents: not just what case studies are, but how they work, why they matter, and how to use them effectively.

There was also a practical reason. When working with professionals, time is precious. My typical sessions rarely lasted more than two hours. In that context, long detailed cases—

valuable as they are—often worked better as pre-reading than as something we could unpack together. I needed stories that fit the rhythm of fast-moving classrooms and workshops: shorter, sharper, and easier to enter quickly without losing depth. Over time, I realized this wasn't just a personal preference. The literature echoes the same concern: Learners need experiences that prepare them for ambiguity, uncertainty and complexity of change where “knowledge is neither fixed nor well established” (Merseeth, 1992, p. 53; Ertmer et al., 2014; Uhl-Bien, 2021). Reading these perspectives felt like a quiet validation: The gap I was noticing wasn't accidental; it reflected a broader mismatch between how we teach organization change and how organization change really unfolds. Change rarely unfolds in neat, linear ways, and our teaching shouldn't pretend it does. I felt that what is needed is case studies of change that are practical, grounded, and “just right” in length; stories that feel authentic, invite reflection, and stay connected to the lived, imperfect, very human experience of organizational change.

At the same time, the literature offered both inspiration and a steady encouragement as I shaped my cases and the book. Scholars and practitioners have shown how cases, activities, and whole-system methods can make learning more practical, relational, and grounded in real challenges. For example, Donald Anderson's (2018) collection of cases for organization development excels in bringing the organizational development process to life, pairing each case with learning objectives, discussion questions, and practical activities that make the material feel usable rather than abstract. Hallie Preskill and Darlene Russ-Eft (2016) take a similar hands-on approach, curating 89 learning activities—many of them case-based—carefully aligned with core aspects of evaluation practice and designed to build evaluation capacity across wide audiences. Peggy Holman, Tom Devane, Steven Cady, and over 90 collaborators (2007) collected over 60 methods to bring change to organizations and change the whole systems. Bob Williams and Richard Hummelbrunner (2009) included approaches and methods to help practitioners deal with complex and complicated situations. This literature reminds us that learning comes not only from success stories, but also from failures, missteps, and the everyday realities of work. That rang true to me.

I began writing my own cases that grow out of real life: Moments I've witnessed firsthand, stories colleagues shared with me, and patterns I've seen repeat across organizations over the years. I included executive change leaders yet centered on voices that are easy to overlook: Managers, champions, frontline staff who quietly carry the work of organization change. At first, I simply recorded these stories with few teaching notes and directions for learning activities to help me guide discussion and facilitate. But as the collection grew, so did my questions. I didn't just want to tell the stories; I wanted to understand how to use them well. What makes a case powerful for learning? How should it be structured? How much guidance is too much or too little?

When I turned to the literature for answers, I discovered that the insights were there but scattered in many books and papers. Case studies are used in multiple disciplines (business, law, medicine, nursing, public administration, teacher education, evaluation, organization development, accounting, disaster response, social work and engineering) and the literature is growing (Anderson, 2018; Bourgeois et al., 2022; Ellet, 2007; Lyons & Bandura, 2020; Montrosse-Moorhead et al., 2022; Slick, 2019). At the same time, the field felt somewhat fragmented. Foundational works, such as the volumes on case methods in teacher education edited by Judith Shulman (1992) and Mary Lundeborg and colleagues (1999), Harvard Business School publications by Louis Barnes and colleagues (1994) and William Ellet (2007), as well as

more recent Todd Stanley's (2019) guide, offer valuable insights into different aspects of teaching with cases. But taken together, they don't quite add up to a single, integrated approach of how we learn from cases and how to facilitate this learning.

More importantly, much of this work is not written with change practitioners in mind and includes surprisingly few fully developed, context-rich cases that reflect the realities of organizational change. For those looking to teach or learn change in all its complexity, this creates a disconnect. The literature is helpful, but it often stops short of offering the kind of cohesive guidance and applied examples needed to support real-world learning in emergent, unpredictable environments. Thus, one of the quiet motivations for this book became *synthesis*, or bringing those threads together so instructors and practitioners don't have to piece it together on their own. If change work is varied and messy, our learning experiences—and the guidance for designing them—should be just as practical, coherent, and accessible.

Each case included in this book weaves together several real situations layered together, capturing the texture of change as it is felt on the ground. The names of organizations, people, products, and identifying details mentioned in the cases are fictionalized, and I included guidance on when and how to fictionalize a case into Chapter 6. The substance—the tensions, the missteps, the small wins, the politics, the human emotions, and the messy reality of organizational life—comes straight from lived experiences. Most of it simply doesn't need fictionalization: If anything, real life is already complex and compelling enough on its own. In the end, this book became more than a case collection; it became a reflection of my intellectual journey. It combines practice, teaching, and research into a coherent argument: that change cannot remain the property of executives or consultants, that case studies can be the central components of a signature pedagogy for preparing change agents, and that learning itself must mirror the realities of emergent, uncertain, and complex change.

What's in the Book

Each part and chapter in this book is designed to stand on its own, so whether you are an academic seeking theoretical grounding or a practitioner looking for practical insight, you can enter where it makes the most sense for your work.

Part I: Organization Change

Part I introduces the foundations of organizational change and change agency, framing change as a dynamic interplay between planned and emergent processes characterized by ambiguity, non-linearity, and continuous sensemaking. It then explores the roles and capabilities of change agents, presenting key frameworks such as contextual agility and emphasizing the need for adaptive, experiential approaches to developing the mindset, skillset, and heartset required to navigate complex change.

Chapter 1 defines organization change and how it occurs through the planned and emergent change. The chapter then goes into the discussion of emergent change characteristics, such as opacity (uncertainty, ambiguity, complexity, and non-linearity), pattern-level understanding, decentralized understanding and continuous sense-making, play, and the view of change leaders. The chapter concludes with explaining where this book stands in the

discussion of change, affirming that there is no one “correct” way for organizations to change, and that any planned change has an emergent component.

Chapter 2 goes into discussing the concept of change agency. Drawing on Caldwell’s (2003) framework, the discussion introduces six models of change agency—from leaders and managers to teams, networks, consultants, and individual contributors. The chapter also introduces the *Change Agent Toolkit*, which distills essential frameworks and tools across the dimensions of mindset, skillset, and heartset. A central contribution is the *Contextual Agility Framework*, designed to help change agents “shift gears” across multiple modes of thinking and acting as situations demand. The chapter closes by considering how change agents are educated, contrasting traditional methods (lectures and presentations) with experiential approaches (role plays, cases, problem-based learning) and newer, more creative practices such as gamification and arts-based methods.

Part II: Pedagogy of Emergent Change

Part II introduces the Pedagogy of Emergent Change as a signature pedagogy for preparing change agents. Case studies are positioned as a central method in the pedagogy to bridge theory and practice, and this view is expanded through the Case-Driven Inquiry (CDI) as a dynamic process of sensemaking, interpretation, and co-construction.

Chapter 3 expands the focus on change agent education by introducing the *Pedagogy of Emergent Change™*. Grounded in the theory of signature pedagogies, this approach recognizes that each profession requires distinctive ways of learning to think, act, and feel like a practitioner. The Pedagogy of Emergent Change™ is presented as a signature pedagogy for change agents: a dynamic, participatory, and adaptive approach to learning that embraces ambiguity, experimentation, and collective sensemaking. Case studies are positioned as one of its core methods, serving as authentic, narrative-based learning artifacts that bridge theory and practice. *Other methods, such as practice-based learning, developmental programs will be covered in future publications.*

Chapter 4 shifts the discussion to how case studies inspire learning. Drawing on behaviorist, cognitivist, constructionist, and post-modern paradigms, the chapter examines different ways of understanding the case-based learning processes. The chapter introduces the *Case-Driven Inquiry (CDI)* as a more expansive alternative to Case-Based Learning and Case-Based Instruction, reframing cases not merely as teaching tools but as catalysts for ongoing, multi-faceted inquiry, where they serve as an evolving focal point for generating questions, testing interpretations, and co-constructing meaning within the community of learners in the classroom. CDI positions cases as catalysts for ongoing inquiry, sensemaking, and co-constructed meaning, reflecting the unpredictable and dialogic nature of organization change.

Part III: Writing and Facilitating Case Studies

Part III focuses on the practice of Case-Driven Inquiry, moving from understanding cases to designing and facilitating them. It examines case studies as rich narrative spaces for learning, provides practical guidance for developing effective cases, and offers strategies for facilitating dynamic, discussion-based learning environments. Together, these chapters equip educators and practitioners with the tools to create, adapt, and lead case-based learning experiences that reflect the complexity of real-world change.

Chapter 5 dives into case studies themselves, framing as narrative spaces that frame authentic, contextualized learning. The chapter reviews the expanding literature on case-based instruction and argues that cases offer more than experiential stand-ins: They integrate individual and collective learning, invite critical analysis, and cultivate the ability to reconstruct meaning in complex, multidimensional contexts. Cases are participatory by design, asking learners to step into real or simulated challenges, grapple with tensions, and reflect on consequences—an essential preparation for professional practice.

Chapter 6 is practical in focus, offering insights for writing cases. It covers criteria for effective cases, considerations for teaching notes and facilitator guides, and a six-phase case development process. It also provides worksheets to help instructors write, adapt, and customize cases in Part IV for specific contexts—a valuable resource for both academics and practitioners who want to design their own case materials.

Chapter 7 provides recommendations on facilitating case studies, one of the most demanding forms of instruction. Unlike lectures, case discussions are dynamic, requiring instructors to balance structure with openness, anticipate diverse interpretations, and manage conceptual and interpersonal complexity. The chapter outlines roles that facilitators play in CDI, strategies for planning and leading discussions, and specific facilitation techniques for both in-person and online learning. The chapter also includes worksheets to support the preparation, session flow, and post-discussion reflection.

Part IV: Case Library

Part IV serves as a case library designed to guide learners through a variety of change situations. The collection includes both successes and failures, since each offers valuable lessons about what works, what doesn't, and—most importantly—*why*. The cases are usually no more than two pages, are practical for busy professionals or facilitators working with 60-120 minutes of class time. These “everyday” stories help readers see themselves in the narrative and reflect on their own agency in change processes. Each case begins with the story itself (except for interactive formats such as the Change Agent Competencies Game, Yarns of Change, the escape room, or theater activities, which combine cases with instructions). Following each case are suggested conceptual anchors, learning activities related to the case, suggestions for adapting the case, and links to the Pedagogy of Emergent Change™. This structure ensures that the cases are not just stories to read, but also *tools to use*—adaptable resources that can be tailored to multiple audiences and contexts. Thus, Part IV expands the conversation on change agents and provides a practical bridge between theory, pedagogy, and lived organizational realities.

Who the Book Is For

This book is written for a diverse community of researchers, practitioners, and learners who share interest in how cases can enrich the practice of educating change agents and helping them navigate complex environments where learning and adaptation are continuous.

For **researchers and scholars**, this book offers both practical and conceptual tools for advancing the study and practice of case-based pedagogy, to include practical strategies for moving beyond traditional lectures toward more dynamic, participatory, and inquiry-driven learning experiences. Faculty across organizational behavior, organizational change, leadership,

business, public policy, healthcare, education, and related fields will find frameworks for designing, facilitating, and assessing case-based teaching that bridges theory and practice. Beyond instructional techniques, the book provides a foundation for investigating how these approaches cultivate sensemaking, reflective practice, professional judgment, and identity development in complex, real-world contexts. In doing so, it supports scholars interested not only in how we teach, but in how experiential and inquiry-driven methods shape professional learning and organizational practice.

Practitioners, such as organizational development and learning and development consultants, will find a practical guide to embedding case methods into leadership development, learning and development (L&D), and organizational training initiatives. Corporate trainers, consultants, and executive educators can adapt its methods to design engaging workshops, team-based learning programs, and executive dialogues that mirror the complexity of the workplace. Cases provide a way to stimulate reflection on past initiatives, prepare for anticipated challenges, and experiment with problem-solving approaches in a safe but realistic context.

Broad range of **change agents**, including executives, middle managers, teams, networks, consultants, and individuals, the book demonstrates how cases can be used as catalysts for dialogue, perspective-taking, and collaborative inquiry. Change agents can use cases to stimulate strategic conversations, reflect on their change experiences, test new ideas, build stakeholder alignment, and surface hidden assumptions. Cases can also help them practice decision-making under conditions of uncertainty, reflect on personal leadership values, and develop resilience when change takes unexpected turns.

Finally, by bridging academic rigor with workplace relevance, this book speaks to **anyone** seeking to equip learners (whether students, employees, or change leaders) with the cognitive, emotional, and practical skills necessary to navigate ambiguity, solve complex problems, and drive meaningful change. It acknowledges that classrooms, organizations, and communities are all learning ecosystems and positions case-based approaches as powerful tools for developing the capacity to lead in contexts of uncertainty and emergent change.

How to Use This Book

There are multiple ways you can use this book—it is designed to be flexible and adaptable to your role, context, and needs. The **Using the Book** matrix below (*Figure 0-1*) highlights the

| Audience | Ways to Use the Book |
|----------|---|
| Scholars | <ul style="list-style-type: none"> • Use Parts I and II for conceptual grounding, literature reviews, and as a foundation for course design. • Teach with Part IV cases (as-is or adapted) to spark discussion and applied learning. • Write new cases using Chapter 6 guidance and worksheets. • Facilitate case-based instruction with Chapter 7 tips, facilitation techniques, and analysis tools. • Conduct research on case pedagogy by drawing on the book’s frameworks. - Apply insights to curriculum development in professional schools (business, policy, education, healthcare). |

| | |
|---|---|
| Practitioners (L&D, Leadership Development, Consultants) | <ul style="list-style-type: none"> • Use Part II cases in corporate training, executive education, or leadership development programs. • Adapt cases for short sessions or workshops with worksheets provided in Part III. • Integrate frameworks (mindset, skillset, heartset) into competency development programs. • Facilitate team-based learning and reflection sessions with practical facilitation tools. • Apply case pedagogy in consulting engagements to stimulate dialogue with clients. • Use as a resource for program evaluation, linking cases to outcomes and competencies. |
| Change Agents (Leaders, Managers, Teams, Individuals) | <ul style="list-style-type: none"> • Use cases as catalysts for dialogue, perspective-taking, and co-creation during change initiatives. • Reflect on personal and team practice through Case-Driven Inquiry. • Adapt cases to organizational contexts with customization worksheets. • Stimulate strategic thinking, decision-making, and scenario planning. • Apply cases to develop mindset, skillset, and heartset in everyday practice. • Use case-based exercises to build change readiness, resilience, and collaboration within teams. |

Figure 0-1: Using the Book

pathways for scholars, practitioners, and change agents, and the following suggestions can help you tailor the book to your purposes:

- **Start with Parts I-III** if you are looking for a literature overview and conceptual grounding on emergent change, change agency, pedagogy of Emergent Change, or recommendations on how to write and facilitate your case studies. Each chapter in this section is self-contained and can be read independently. You can focus on the chapters that are most relevant to your scholarly, educational, or practitioner work, for example, those on change agent models, the Pedagogy of Emergent Change, or Case-Based Inquiry.
- **Go directly to Part IV** if your immediate need is to educate, train, or facilitate. This section provides the case library with case text, conceptual anchors, facilitation recommendations, and recommendations on how to adapt cases. You can use the cases as written or adapt them for your own setting using the *Case Adaptation Worksheet* in Chapter 6.
- **Write your own cases or adapt a case from Part IV to your needs.** Chapter 6 includes a six-phase case development process and a *Case Writing Worksheet* that can guide you through crafting new cases tailored to your learners or organizational challenges.
- **Facilitate with confidence.** Chapter 7 in Part III provides step-by-step guidance on to facilitate learning activities effectively—balancing structure with emergence, guiding dialogue, and ensuring productive classroom or workshop flow.
- **Apply across contexts.** The cases and teaching methods are not limited to academic settings. They can be used in corporate training, executive education, team retreats, and leadership development programs. For example, practitioners can use cases to stimulate problem-solving in team-based learning, while academics can assign them for critical analysis in graduate classrooms.
- **Integrate with other tools.** The book’s frameworks (e.g., the Pedagogy of Emergent Change™, Case-Driven Inquiry, Contextual Agility Framework, Change Agent Toolkit, 5D change Model) can be combined with organization-specific models, performance tools, or leadership frameworks already in use. This makes it a supplement, not a replacement, for existing practices.

- **Extend beyond teaching.** Beyond classrooms and workshops, the cases can serve as reflection tools for leaders, managers, and change agents to pause, consider parallels to their own challenges, and spark dialogue with colleagues.

In short, whether you are a faculty member designing a syllabus, a consultant preparing a workshop, a manager leading change in your organization, or an emerging change champion, you can choose to engage with the book in a way that matches your context: read, teach, adapt, or reflect.

DRAFT