

Workshop Proposal: A case writers' guide to productively utilizing ethical AI

Presenters:

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Abstract

This proposal is for a hands-on session in a workshop format. The presenters will demonstrate how to select an AI to use and then develop strategies to ethically apply it to each stage of case writing. For each stage of the development of a case and teaching note, the presenters will share prompts and suggestions to help potential authors use AI as an agent, not author. The authors caution research to write their own cases and also disable the AI function of grammar checking software like Grammarly.

The researcher is always responsible for evaluating the output and for authorship. This workshop will show participants how to use AI with ethical guardrails. The workshop will also review best practices for communicating how AI was used with a sample AI statement to include in the publication or upload separately, depending on the requirements of the publication. The presenters encourage participants to bring their laptops and engage with an AI as the topics are presented

Faculty attending this workshop will learn:

1. Identify how to select the best AI to use to protect authors' intellectual property and respect copyright.
2. Apply the use of AI as a research assistant for all of the stages of case writing for either primary or secondary sourced research.
3. Create a prompt library to use for case study research.
4. Analyze the pitfalls of AI to avoid in research including hallucinations and incorrect output including how to ethically use grammar checking software.
5. Create and share AI use statement for publication tailored to publication requirements.

Introduction:

Table 1 indicates the steps involved in the case writing process, from inception to publication. The presentation will identify the challenges authors face at each stage for both primary and secondary cases. In addition, the presentation will identify AI solutions to those challenges and help clarify the best practices that incorporate effective and ethical use of the technology.

Table 1: Components of a Case Study

Component	Phase Description
Idea Generation	A class topic or idea to illustrate a theory or concept.
Case Component	Using primary or secondary sources to develop a case study. Researchers write the case in their own words but use AI to determine how to approach organizations, interact with them, find secondary sources to supplement the primary data. Secondary cases can be created using brainstorming to find sources to support a case story.
TN (Teaching Note) Component	Ensuring that the TN meets the basic publication template.
Teaching Component	Develop ideas for how the case can be taught and student work evaluated. For example, AI can help create rubrics for discussion questions.
Reviewing Phase	Grammarly is used to spell check, for basic grammar and to make sure that there is only one space after each period. Make sure to avoid applying Grammarly to quotes from interviews or sources. Cite check to make sure all cites are in APA7 for both in the text and in the references. Check for orphan sites in the references or cites in the text with no reference. Determine sources of ambiguity and resolve them. Once a reviewer weighs in, create a table with their comments and author responses.
Publication Phase	Create a project management pipeline with deadlines and manage co-author interactions.

Using AI

The following section is not an exhaustive example of how to use LLMs to support case study research. For each of the steps from inception to publication, there are challenges, AI tools and prompts that the presenters will introduce and discuss with the participants.