

THE PEARSON CUSTOM BUSINESS RESOURCE GUIDE TO...

TEACHING BY THE CASE METHOD

The case method focuses on idealized scenarios or “case studies” that describe managerial problems or opportunities. While the approach may be unfamiliar to some instructors, many feel that case discussions are the most useful and enjoyable experiences they have in the classroom.

Why use the case method?

Compared to other methods of instruction, the case method has several advantages:

- Your students can immerse themselves in a simulation that brings theory to life;
- Teaches how, when and why to apply specific principles or tools already learned;
- Develops reasoning, judgment and communication skills;
- Provides a tool for increasing student participation;
- Offers a common context for graduate students to share different experiences.

Do case studies have an answer?

Well-written cases offer sufficient information to make reasonable conclusions about alternative courses of action. Instructors have the option of leading students through an orchestrated process that ends with concrete answers to concise questions.

Designing courses to include cases

Case studies are appropriate for a wide range of audiences, subject areas, teaching styles and learning objectives. They are one element of a comprehensive approach that includes lectures, readings, papers, examinations and exercises. At least 20% of classroom time during the semester should be devoted to case discussions, in one or two hour blocks.

The editorial team for Prentice Hall Custom Business Resources can assist you in selecting case studies and even designing the overall tempo of a course that includes cases. We offer standardized “case mapping” templates (which match cases to texts and topics) and individualized consultation with experienced case study instructors.

Teaching approaches

Case studies may be used several ways, depending on your teaching style and learning objectives:

- Lecture – Use a case study as the context for a standard lecture on a related topic;
- Open discussion – Invite open and unstructured discussion about the case, followed by a short lecture with your conclusions;
- Guided discussion – Orchestrate a discussion that appears to be unstructured, but which proceeds through specific stages or topics based on your subtle guidance in the form of questions and comments;
- Debate – Divide the class into teams representing individuals or groups within the case, and then officiate while the teams debate key decisions;
- Role play – Assign students to play the role of individuals within the case, and then provide guidance while the participants discuss key decisions;
- Presentation – Divide the class into teams that make formal presentations, playing the roles of outside consultants to the organization.
- Paper – Assign a written paper in which students analyze the case scenario and make recommendations.
- Examination – Use a (short) case scenario as the basis for an essay question on a written examination.

Learning by the case method

The case method may be new and confusing to some students. The analysis, reflection and participation required will be difficult for those accustomed to simply memorizing facts. If students have not been introduced to cases in previous classes, then you should clearly explain the case method and your expectations. This might include assignment of *Learning by the Case Method* (HBS 9-376-241) or Note to the Student: How to Study and Discuss Cases (Darden I-G-0561). For the first class, choose an opening case that is relatively simple and then be attentive to process. Periodically pause to reflect upon the positive behaviors you observe.

Instructor preparation

Thorough preparation is critical to the success of the case method. New instructors using new cases should plan half a day of preparation for each hour of classroom discussion. Your strategy for classroom management is even more important than your analysis of case content, and after reading a case you should pause to imagine the discussion. Create an outline that includes questions you will ask and possible answers, arranged in sequence. Reflect on the objections and missteps that could arise and insert possible recovery strategies. You may also insert prompts for timing or page numbers that refer to evidence.

Student preparation

You may give students the following generic questions, which can be supplemented by additional questions specific to each case.

- What are the basic facts? What are the characteristics of the company and the market?
- Who are the key players? What are their objectives?
- Is there an organization in distress? Is there an undeveloped market opportunity?
- If so, what are the symptoms? What are the measures or evidence? Are they biased?
- Are there underlying problems or trends? What are they? How do we know?
- Is there one transcendent problem or opportunity? What is it? How do we know?
- What decisions need to be made? What are the alternatives for action?
- What are the pros and cons of each alternative? How do we evaluate them?
- Which alternative do you recommend? Why?
- What should we learn from this case?
- How does this case relate to the course topic? To other cases? To the reading?

Students should read the case once, attempt to answer the questions independently, and then read the case again. You may also suggest that students meet in informal discussion groups outside class, to lay the groundwork for subsequent class discussion.

Classroom Discussion

The case method depends upon dynamic classroom discussion. Use the following guidelines:

- Be selective – Most case studies include too much material to cover in one class session. Your goal is not to review every fact or answer every study question. Focus on major themes, ideas and points of evidence.
- Choose a teaching style – Select a teaching approach that fits your personal style, that makes you comfortable in the classroom, and that fulfills your specific learning objectives. If there is a teaching note available, consider the suggestions optional.
- Take your time - Begin with a deliberate discussion of the facts and symptoms. Students will attempt to jump ahead to diagnosis and action, but you should discourage this. Basic facts that are overlooked may bias subsequent analysis, and managers must learn to differentiate between symptoms and problems.
- Ask questions – Your questions will help students uncover important issues and will help you manage the progress of discussion. While some may be identical to study questions, others may be introduced in discussion. Universally effective questions include “Why?” and “What evidence supports that?”
- Encourage positive conflict – Differing opinions can be useful in highlighting alternatives. When disagreement occurs, manage the process to your advantage. Pause to summarize the opposing views and then ask other students for their reactions.
- Allow uncontrolled discussion – As the discussion proceeds, it will become increasingly unfocused and undirected. This is healthy in limited doses. Your goal is to orchestrate a discussion that balances student autonomy and instructor control.
- Maximize participation– Make sure that every student participates in each case discussion. If necessary, “cold call” quiet students by asking for their reactions and opinions. Useful questions include “Do you agree?” or “What do you think?”
- Use the chalkboard – Use the board to document and emphasize important ideas as they arise. Take a moment to step out of the discussion by writing a single word or short phrase, and then explain its significance or simply leave for later discussion. Use the board to graphically explain the hierarchies and connections between ideas, and to provide an underlying structure for the discussion.
- Watch the clock – Monitor time throughout the discussion, to ensure that important themes are sufficiently covered. During preparation, assign blocks of time to each major concept. During the class, as each time block expires, ask a question or make an observation that moves discussion forward. Leave time for a debriefing session.
- Delay judgment – You are a guide and referee. Remain neutral during the class discussion and save your opinions for the debriefing session. Allow students to work through the issues themselves. While every idea may not be valid or useful, you should respect and encourage the comments of all participants.
- Summarize learning – Near the end of class, stop the discussion and summarize what has occurred. Review the differing points of view and provide some generalization about the issues. You may leave the conclusions ambiguous, underscoring the idea that management is an art. Or you may express your opinions about the “correct” answers, including any epilogue regarding the actual outcomes of real-life cases. Regardless of your approach, it is important to help students reflect on what they learned during the session. Link the case to reading assignments and other cases.

Evaluating student performance

Participation grades should be substantial and proportional to the class hours spent in case discussion. After each case session, take a moment to record your reactions to the comments of each student. Assign daily grades on a simple three-point scale (good, average, poor). Use the following criteria for both verbal and written grading:

- Identification of facts, people, interests, symptoms, problems and opportunities
- Relevant, accurate and effective quantitative analysis (if appropriate)
- Sophisticated and detailed analysis, followed by reflection
- Use of evidence to support arguments
- Specific recommendations for action and justification of choice(s)
- Concise and convincing communication

Maintaining academic integrity

The case method offers unique opportunities for students to avoid work or even plagiarize. Poor preparation also undermines discussion sessions. Use the following guidelines:

- Assign (and grade) one-page summaries of study questions
- Collect summaries or papers at the beginning of class
- Require that students submit an additional copy by email and maintain a file
- Select several cases for each topic module and then rotate every semester
- Develop multiple study questions for each case and then rotate every semester
- “Cold call” students on a random basis, especially those who do not volunteer
- For groups, assign a confidential peer evaluation at the end of the semester

References

This brochure was prepared by Bradford Hudson of Boston University, the consulting general editor for Prentice Hall Custom Business Resources.

Sources included the following publications available through **Prentice Hall Custom Business Resources**.

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