

## The Case Method

### **Part 1**

Overview of the Case Method

### **Part 2**

Case Uses

### **Part 3**

Assessing Case Quality

This section provides an overview of the key features and uses of the case method. It is arranged in three (3) parts.

*Part 1* identifies key features of the case method and distinguishes it from other training approaches.

*Part 2* discusses how cases can be used to support a range of training objectives and activities.

*Part 3* introduces the concept of case quality as well as how it can be measured in order to assist the professor in assembling a portfolio of effective training materials.

Additional Notes:

# **The Case Method**

## **Part 1**

### **Overview of The Case Method**

This section outlines the key features of the case method. Additionally, the case method is contrasted with the lecture format to help illustrate why the case method is favored when professional skill development (e.g., decision making) is a major training objective of a educational program.

Additional Notes:

## What is a Case?

---

### A Case:

- Describes an actual challenge, opportunity, decision or problem faced by a manager,
- Is written,
- Contains information available to the manager, and
- Is released.

*Item #1.* Many do not realize that a case describes an actual situation that a company and its management team have faced. It's not fictitious. Knowing this, is a great way to motivate and involve students in working the case. This is especially true if the students know of the company and believe the problems described in the case are issues that they too one day will have to face. While being based on actual events is an advantage enjoyed by the case method, it is also a significant liability. That is, cases are time sensitive. As business conditions change, a case and its lessons may become less relevant. Sometimes cases address "classic" business problems and can enjoy a longer life. But still, all cases eventually become outdated.

*Item #2* seems obvious. It's important, however, to note that a case can not simply a verbal description. It is carefully organized written description of an actual business situation. It probably has been revised a number of times for clarity to ensure that it delivers some training objective of interest. In its written form, it can be readily and reliably shared with other trainers.

*Item #3* is important in that we are asking participants to assume the role of the manager depicted in the case and to make some critical decision. If information is included that managers would not normally have (e.g., competitors' product costs) then the case is unrealistic and loses credibility with students.

Finally, *item #4* notes that a case is released (by the firm depicted in the case). This is a quality control check that lets us know that the case is valid. Someone at the firm who has an extensive understanding of the events described in the case is verifying that the facts are correct. Note that a case cannot be distributed or discussed if the firm does not release it. Using unreleased cases is a violation of the privacy of the firm and its management team.

### Additional Notes:

### Case Features

	Role of Professor	Role of Student
Lecture Method	Expert	Passive Recipient
Case Method	Guide	Active Discussant

For those who have not used cases much or at all, its sometimes helpful to understand what a case is by contrasting it with probably the most common approach to training, the lecture method. All have either given or received lectures as a part of some educational program.

The case and lecture methods can be compared by examining the role of the professor and student in each. To use the lecture method, the professor needs to possess superior knowledge to that of the audience or class. Consequently, the student's role is to receive that knowledge by paying attention and taking notes. While the student may on occasion ask a question to clarify some issue or how to apply some point made in the lecture, for the most part the student role is that of a passive recipient.

In contrast, in the case method both the student and professor are active. In some ways, the case method is an easier role for the professor to assume. The professor does not always have to be current about some business issue being discussed. Rather, they can focus more on the students' decision making process and thus help them to make better use of information in order to resolve management problems. Also, the case method encourages students to collaborate with peers to find business solutions. Working effectively with other managers is a valuable resource that many firms could use in order to be more competitive in the marketplace.

Additional Notes:

# **The Case Method**

## **Part 2 Case Uses**

One reason cases are a popular instructional tool is due to the number of ways they can be used to support an educational program. The following section provides a brief overview of major case uses.

Additional Notes:

## Case Uses

1. Concept Introduction, Application and Testing
2. Management Development
  - Improving Individual Decision Making
  - Team Building
3. Promote University-Business Collaboration

From the above description, you can see that cases are quite versatile and can be used in a number of ways within an educational program.

*Concept Introduction, Application and Testing.* The professor can introduce a topic by assigning and working a case that introduces an issue new to students. In this way, students' can try to solve the case only to realize that they need additional training in order to do so. The professor can follow up with assigned readings or a lecture in order to fill in this gap. The case can be reintroduced to allow students to apply their "new" knowledge and test their understanding. Alternatively, cases can be used as an assessment device. A case can be assigned and graded to test each student's knowledge about some business issue of interest.

*Management Development. Decision Making:* As a case is being worked in class, the professor can challenge students on how they arrived at some conclusion. In this way, the professor can help improve how student's use information to address business problems by uncovering hidden assumptions and illogical reasoning. Doing so in the classroom exposes other students to good "information use and decision making" practices. *Team Building:* By assigning students to work cases in small groups, the professor encourages team work. Some students will be good team players while others may not know how to work well in a collaborative fashion. The professor or a teaching assistant can monitor the small group as it works or discuss with the group how the work was completed. In either case, some assessment of how well the group functioned as a team can be made. The professor can provide feedback to help students improve their collaborative skills. Students that can build teams and use them effectively to help address and manage business issues are invaluable to their prospective employers.

*Promote University-Business Collaboration.* Cases can be used to bring the business community into the classroom in two ways. First, a case can be written about a local firm and some of the business challenges it faces. Students would then attempt to solve the case and present its findings to the firm's management team. Ideally, the class would give the firm some options on how to resolve some business issue of interest. Management on the other hand could provide students pragmatic feedback on their case work and help them understand the business world in more depth. Second, managers from the business community could be recruited as adjunct faculty in order to provide background on technical or industrial matters important to the case at hand. In this way, the university gets access to a pool of very affordable and valuable business experts. Both of these approaches can build strong university-business partnerships. Such partnerships can promote the interests of both parties. Businesses get access to inexpensive consulting services (in the form of case study on their firm or industry) as well as potential employees who better understand the realities of the market place through case instruction. Universities get a quick yet robust external check on its curriculum and research programs to ensure that they are in step with the needs of the business community.

# **The Case Method**

## **Part 3**

### **Assessing Case Quality**

Soon we will be examining how to write a case as well as how to use cases for instructional purposes. Prior to doing so, its important to understand what is meant by case quality. Knowing this will help you write and use cases later on.

Additional Notes:

## Case Quality

### Text Quality

- Easy to read, comprehend sequence of events,
- Relatively complete,
- Engaging, and
- Includes a clear, doable assignment.

### Instructional Quality

- Invites application of business knowledge,
- Requires some analysis and judgment, and
- Deals with relevant business concerns.

Case quality can be assessed both before and after the class discussion. Before class, case quality can be determined by critically reading the text as well as the training note included to help the professor prepare for and conduct the case session. The case should read well and tell a logical, complete and compelling story of events leading up to the problem that management must now resolve. Part of the success of teaching with cases is dependent upon the students being interested in the situation at hand and being able to assume the position and responsibilities of the management team depicted in the text. At the end of the case, the professor should ask themselves if the assignment can be completed given the information provided by the writer. If not, solving the case may necessitate making a number of major assumptions. Doing so, decreases instructional value since any analysis rests more on assumptions made by students rather than the facts and issues included in the case itself.

A second means to evaluate case quality involves inspecting the training note supplied by the case writer to support the professor in leading an effective case discussion. By reviewing the training note, the professor can assess if the case calls for an in-depth application of some business concept of interest here. Sometimes cases do a great job of describing a company and how it operates but do not require much analysis or concept application. For example, the case might describe in detail why the firm needs an inventory control system and how it has suffered without one. Knowing this does not permit the student to perform some analysis or make and defend some judgment call. The answer is relatively simple and straight forward (e.g., assign someone to design and manage an inventory system). Finally, the professor needs to decide if the case addresses some business issue important to training managers as well as important to the business community that students will be placed following graduation.

As noted above, case quality can also be assessed by examining the quantity and type of discussion generated in the case session itself. A review of this discussion can be found in the section, "Teaching With Cases" (page # 43).