Preparing for the Case Session

Part 6

Student's Case Preparation

Part 7

Professor's Case Preparation

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The materials found here provide a brief overview of how to teach using the case method. It is organized into two parts.

Part 6 describes a systematic approach that students can use to prepare for in-class case discussions.

Part 7 provides a detailed description of how professors should plan out case sessions. Additionally, in this section an overview of how cases are designed and constructed is included. It is assumed that professors can use and adapt cases better if they understand case design and construction.

Additional Notes:

Preparing for the Case Session

Part 6

Student's Case Preparation

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Part 6 (slides #23 - #30) describes a systematic approach to help students prepare cases for in class discussions.

Additional Notes

Teaching and Learning With Cases

Students

Before Session

1. Receives Case & Assignment
2. Individual Preparation
3. Small Group Discussion

During Session

1. Raises Questions Regarding Readings
2. Participates in Discussion

Post Session

1. Case Application
2. New Questions

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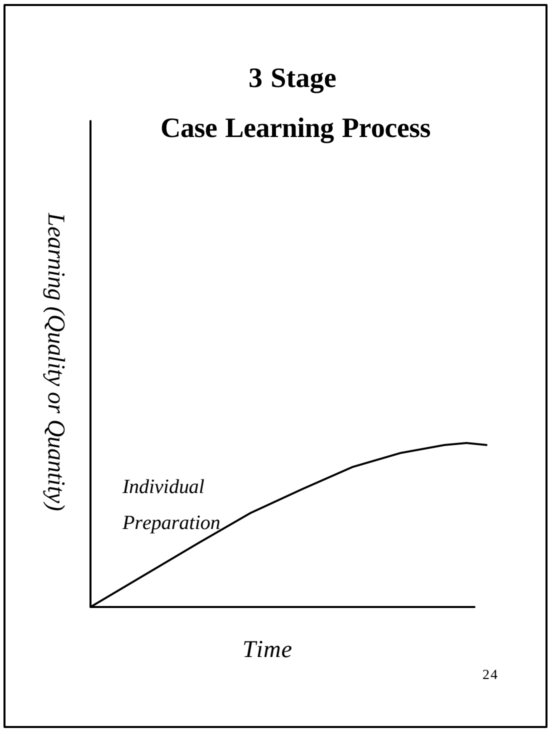
This slide outlines the various responsibilities and activities that are expected of students before, during and after the case session.

Slides #23 -#30 focus on how individual students as well as the small groups that they are assigned to should prepare for a case discussion (i.e., "before" the session). What students should do "during" the case session as well as after ("post" session) will be addressed soon. Note for now, however, that during a case session it is sometimes necessary to review outside (related) readings. These readings often are assigned to provide students with some context (e.g., industry history) or technical background (e.g., how vegetables and produce are preserved/protected for export) to promote case understanding and discussion. After the case discussion, we expect students who are presently employed to apply case lessons to some business situation they are facing as well as bring up any problems in doing so in subsequent training sessions.

For now, lets focus on the "before session" segment. You might want to write down how you believe students should prepare for a case discussion. You can compare and contrast your responses with a systematic approach (slides #23 - #30) to individual and small group case preparation suggested by many case experts. Note that this approach described shortly is an ideal. Many of your students will use some but not all of these steps. Still, you could emphasize that they should consider using this approach in order to refine their case skills.

Additional Notes



Learning (quantity and/or quality) via the case method is thought to occur in stages. There are thought to be 3 stages (see slide #30 for complete figure). Each stage (individual preparation, small group discussion and large group discussion) adds to our understanding of the case.

In the first stage, individual preparation, learning increases as one spends more and more time reading and analyzing the case at hand. Soon, however, one reaches a maximum in terms of the amount of understanding one can extract from a given case assignment. This might be due to limitations of one's educational and/or professional background and experiences.

Still, in order to be efficient, individuals are encouraged to be systematic and thorough in their case preparation. Slides #25 - #27 describe such an approach.

Additional Notes

Individual Case Preparation

1. Read first paragraph (or 2 or 3) and last paragraph (or 2 or 3) and stop.

2. Answer, the following questions

- Who is the decision maker/focal person?
- What is the task, challenge or concern?
- Why has this occurred? Impact on firm?
- When does decision maker have to act?
- How does decision maker propose to deal with concern; list the major steps?

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The following 3 slides (#25 - #27) describe a very thorough approach individuals could adopt to understand and prepare a case for discussion back in the classroom.

Steps 1 through 6 (slides #25 - #26) outline how students should briefly skim the case and the assignment to get an orientation to what the case is about and what will be required of them.

Additional Notes

Individual Case Preparation

3. Turn to exhibits, read titles and survey contents for quick impression.

4. Review the major headings in text.

5. Skim text quickly by reading first and last sentence of each paragraph

6. Read the assignment questions.

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20 - 25 minutes

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Steps 1 - 6 (outlined in slides #5 and #6) should take anywhere between 20 to 25 minutes for longer more complex cases.

Additional Notes

Individual Case Preparation

7. Apply problem solving model as you read case carefully:

Problem Statement

Causes and Analysis

Alternatives Generated

Decision Criteria

Alternative Analysis & Evaluation

Decision

Action Plan

Implementation

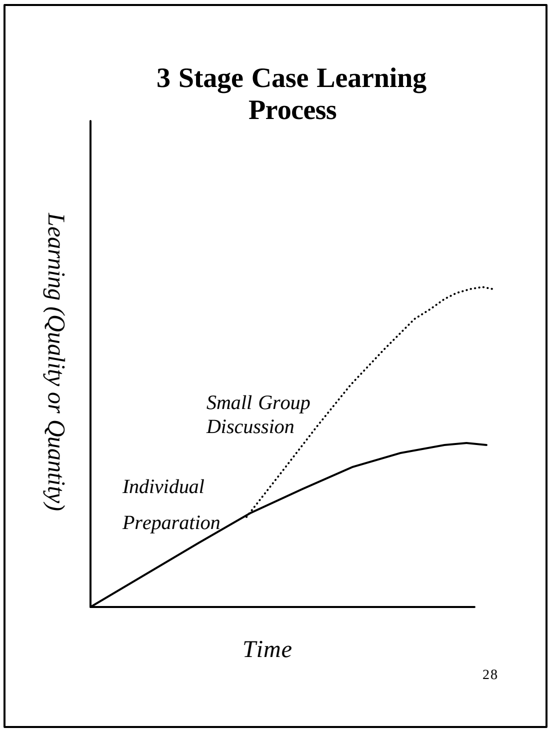
Evaluation

27

Step 7 (Problem Solving Model) requires students to use a simple problem solving model to organize events and information contained in the case as they read it thoroughly. Doing so, will help prepare them to discuss their observations and decisions with others.

Professors might want to instruct students on this approach to case preparation by first assigning a case and later asking them about how they did their work. Consider recording their responses to later identify how students on average prepared the case assignment. Contrast your students' approach with the approach outlined here. You might want to ask students what parts of the recommended approach they thought they might use for subsequent case preparations in order to improve their case work.

Additional Notes



This slide demonstrates how the 2nd stage (small group discussion) of the 3 stage learning process builds upon individual case preparation. By discussing the case and working out assignments in the small group, individuals learn more about the case and the business concepts targeted by the case writer. Case discussion and debate is enhanced by the varying viewpoints and backgrounds held by group members. Small group discussion builds upon the learning that individuals were able to achieve by their own efforts.

Even in well functioning groups, the level of learning will plateau given that the group members bring their own biases and limitations to the discussion. How much learning occurs, however, depends upon how well the group functions. A set of rules governing small group discussion is found in slide #29.

Small group discussions can be conducted during class time. Alternatively, if students are on campus or live near each other, the professor can ask students to complete work in their assigned small groups before coming to class. Class time then can be used for a discussion with the group as a whole.

Additional Notes

Study Group Rules

1. Individual preparation required.
2. Everybody participates in discussion.
3. Following appointments not necessary.
   - Secretary
   - Leader
   - Group Spokesperson
4. Consensus generally not necessary.
5. Establish and stick to time limits
6. Be prepared to contribute to large group discussion

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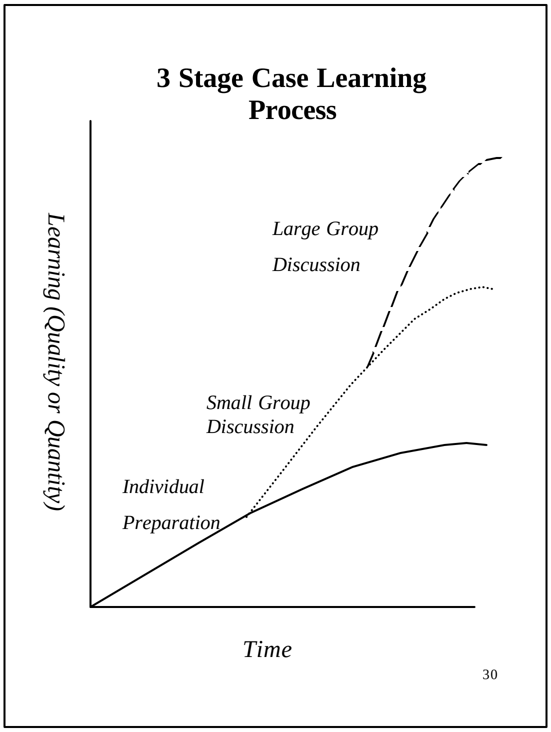
In the slide above, you will find some rules that have been found to help improve case preparation in small groups. Often students work informally (i.e., few or no rules) in small groups.

Consider after assigning a case and requiring students to work in small groups (perhaps in class), having each group report on how they worked together. In other words, they should describe how the small group got ready to discuss their findings with the class at large. Compare and contrast the (small group) study group rules that your students used with those found above. Amend the list as needed. Again, the rules above have been found on average to help students do their work. Your students might want to add other rules to guide them.

Ask your students to use the rules agreed upon here during their next case assignment. At that time, consider having students report on which rules they found useful or what rules they had to modify in order to get their work done in their small groups. You might have to revisit the study group rules and revise them as needed. By the time you finish your course, your students should have a system in place that helps them use cases to improve their understanding of key business concepts.

<u>Additional Notes</u>



Large group discussion is the final stage of the 3 stage case learning process. Discussion here builds upon the work completed in the small groups. Given the diverse backgrounds and opinions now found in the large group as a whole, learning can be taken to a higher level (see vertical axis above). How to conduct large group discussions to achieve this level of learning is discussed later.

This slide marks the end of the presentation/discussion on the systematic method to guide individual and small group case preparation.

Additional Notes

Preparing For the Case Session

Part 7

Professor's Case Preparation

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Part 7 reviews how the professor should prepare the case to use in class. Slide # 32 does this by outlining the steps the professor should follow before, during and after the case session. For now, we will only concern ourselves with the activities and responsibilities of the professor before the case session. Slide #33 poses a number of questions that the professor should consider in designing the case discussion session.

Also included here is a brief overview of how cases are designed and constructed (see slides #34 - #37). It is thought that an understanding of case design and construction provides the professor with insights about the case's limits as well as applications in the classroom.

Additional Notes

Teaching and Learning With Cases

Professor	Student
Before Session	*Before Session*
1. Assign Case/Reading	1. Receives Case & Assign-ment
2. Prepares for Session	2. Individual Preparation
	3. Small Group Discussion
During Session	*During Session*
1. Leads Discussion	1. Raises Questions Regard-ing Readings
	2. Participates in Discussion
Post Session	*Post Session*
1. Evaluates Learning	1. Case Application
2. Updates Training Note	2. New Questions

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Next, we need to turn our attention to some steps that may help the professor prepare for the case discussion session. The student method just discussed is placed along side the activities and responsibilities that should guide the professor's preparation. This is done to show you that both parties are active in preparing for and participating in the case method (before, during and after the training session).

Before the session, the professor might assign some outside readings to give students some context or technical background to help them understand the case and/or complete an assignment. In terms of preparing for the session, the professor naturally will read the case and outside readings thoroughly. Additionally, the professor should work through any assignments.

To assist the professor in preparing for and conducting the session (i.e., large group discussion), the case writer provides a training note. The structure and use of this note will be discussed later (in Part 8 - Leading and Evaluating the Case Session; see slides #47 and #48). For now, it is simply important to note that the professor would read the training note in order to understand how the writer intended the case to be used in order to deliver some training or teaching objective of interest.

Following the session, the professor should evaluate learning. You can grade each student's participation in the case discussion, their written answers to assignments completed before class and/or some short essay answers solicited during some testing period. In working in the business community, an evaluation is conducted by assessing the quality and quantity of the case discussion, whether or not training objectives were realized and how well trainees were able to apply the case lessons to actual business decisions they or their firms were facing. Objective tests are seldom used to assess case learning.

Additional Notes

Professor - Case Preparation

1. What are the major issues (immediate and basic) in this case?
2. How does this case related to past/future course (training program) content or other cases?
3. What are the major objectives (of this training program) and how does this case reinforce these objectives?
4. How should the discussion (analytical information) be recorded and organized? (e.g., "Board Plan")
5. What traps does the case encourage? What lessons do trainees learn as a result?
6. Use summary comments? If so, content?

Adapted from Bonoma, Thomas (1989) "Learning with Cases", Harvard Business School (9-589-080).

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This slide continues to examine how the professor should prepare for the case session. As noted earlier, the professor must read the case as well as any required readings and work out the student assignment. Additionally, they should attempt to answer all of the questions posed above. The questions posed above are fairly self explanatory.

The first 3 questions are issue oriented. Answering the first question helps the professor keep in mind what decisions have to be made in the case as well as what are the underlying lessons the case is trying to impart. The second and third questions help position the case within the larger training program or course. They can serve as a check to make sure the case is a good fit and choice at this time. Additionally, you might want to give students some rationale either before or after the discussion on how this case supports training objectives. Sometimes such a "positioning" statement helps broaden the lessons learned (or to be learned) from the case to fit within some larger training or management concerns.

Question #4 requires the professor to think about how to record and organize the group discussion. Students are often caught up in debates and may find it hard to track what has been said to date. Recording and organizing the discussion as it unfolds helps the group to see what ground has been covered and to conveniently revisit (challenge) past discussion points. No one is dependent solely on memory.

Question #5 helps the professor anticipate where the discussion might get off track and help him/her prepare how to refocus the discussion. Additionally, it may help the professor diagnose what steps in the problem solving model employed here might need more attention by this particular group of students (e.g., need to develop more comprehensive decision criteria).

Question #6 forces the professor to summarize the case and relate it back to program or course objectives. In doing so, the professor should try to relate any planned conclusions to the actual case discussion just held to ensure that students see how their efforts help deliver the training and/or course objectives.

Additional Notes

Training Objectives

Defined: The goal of the case discussion.

(e.g., "To have trainees identify and evaluate the advantages and risks that partnerships with key customers pose to suppliers.")

Training objectives impact:

- The concepts addressed in the case.
- The type of questions and assignments posed to trainees.

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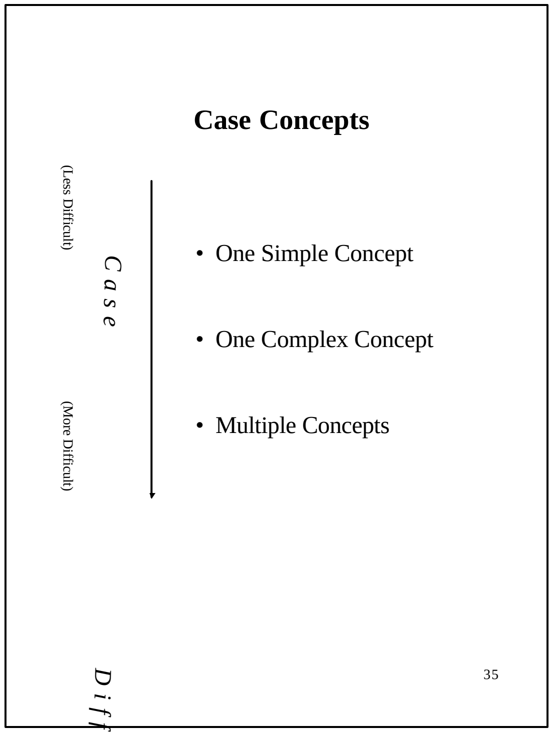
As a part of the case preparation, the professor might want to examine how the case was constructed in order to get some insights about how it can be used to deliver some business lesson of interest.

First, its important to recognize that cases are developed to deliver some training objective. The training objective here is defined as "the goal of the case discussion". Above, for example, a training objective for a purchasing case has been identified in the parentheses. Training objectives are initially defined by the writer in order to help guide case development.

As also noted in the slide above, training objectives are largely shaped by contents of the case assigned to the class. For example, a case that focuses on when and how to work closely with key customers, would support the training objective found in the slide above (e.g., "to have students identify and evaluate the advantages and risks that partnerships with key customers pose to suppliers"). Such a case would not work well with training objectives that focused on other economic or business issues outside of sales or marketing. Once the training objectives are clearly understood, the type of questions and/or assignments posed to students to realize these teaching objectives must be determined. Again, many cases come with such questions and/or assignments. Still, it's the professor's responsibility to adapt these questions or assignments as needed to fit the needs of his or her students.

It's important to note that cases address a limited set of training objectives and thus have a specific training application. Consequently, cases can not be indiscriminately used to meet a wide range of training purposes.

Additional Notes

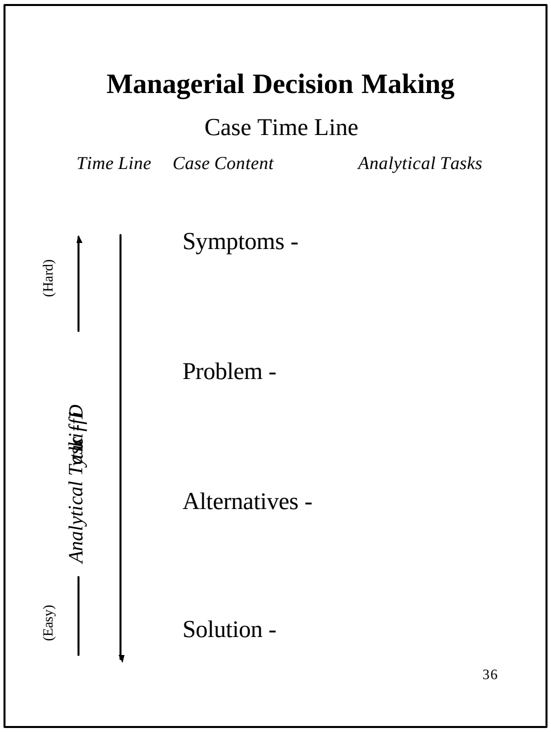


Often training objectives focus on teaching students about some business concept. It's important for the professor to realize that the concepts found in business cases can vary in terms of the number and complexity of concepts included. What concepts are included in a case greatly impacts the scope of training objectives the case can address.

For example, a case that addresses a single concept like supplier-key customer purchasing partnerships, would be hard pressed to use the case to deliver training objectives related to accounting or financial management issues.

At the same time, the professor needs to keep in mind that the type as well as the number of concepts included in a case impacts its difficulty. From this slide it appears that including complex and multiple concepts in a case increases its difficulty. A professor wanting to cover the basics of buyer-seller partnerships (assume partnerships is a simple, single concept) might reject cases that included more complex (e.g., strategic planning where partnerships was an aside) or multiple concepts (e.g., training and managing legal contracts and personnel to oversee partnerships). Selecting cases that focus on more complex or multiple-related concepts might impede realizing some more basic "partnership" training objectives. Of course, using "easy" cases (single simple concepts) conversely may not be appropriate when attempting to understand how partnerships are really managed in modern corporations.

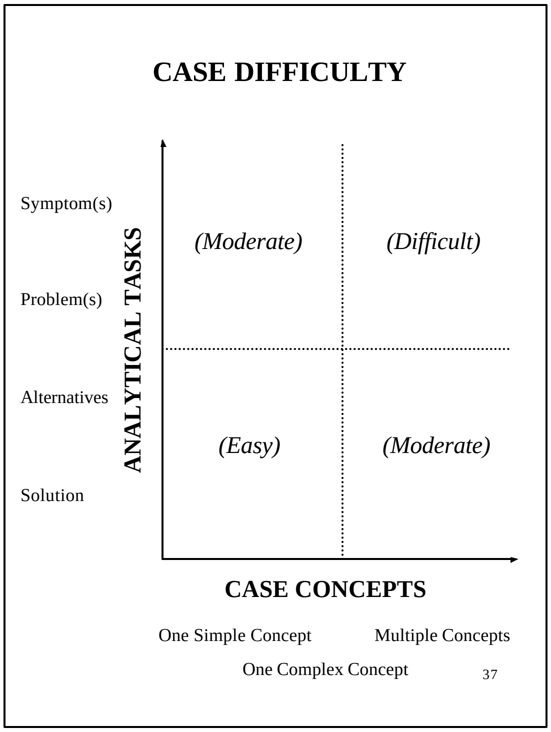
<u>Additional Notes</u>



In addition to deciding what kind of concept (simple or complex) and how many concepts to include, the case writer must decide how much of the story to include in the case itself. How much of the story is included in the case impacts what kind of work (analytical task) will be expected of the student.

The above slide introduces the notion that the case writer makes some decisions early on as to what kind of business case he or she wants to develop. The writer must decide what issue they want to focus on (see previous slide on concepts) and what they want the student to do (analytical task). The analytical tasks can be thought of in terms of the steps underlying managerial decision making. In this slide, these steps are symptom recognition, diagnosing problems, identifying and evaluating alternatives, making and critiquing solutions. The writer decides how much of the story to include in the case (i.e., where to fix the case along a time line) and consequently what analytical task to have students perform. Generally, the more tasks assigned (e.g., making the student diagnose a problem and work towards a final solution as compared to simply evaluating alternatives) the more difficult the case is thought to be.

It's important for the professor to fix an assigned case along the time line found above. Doing so, helps that professor understand the kind of analytical task they are expecting the student to perform. Again, this kind of understanding may assist the professor to prepare for upcoming case session. The professor may decide to make the case harder or focus on some other analytical task by changing the case assignment itself or changing the in class discussion in some way. Making such adjustments allows the professor to adapt a given case in order to deliver a teaching objective of interest. Often the professor can not find a case that exactly matches what they need for a given class period. Since case content is fixed, the professor might want to find a case that generally addresses a topic area and adapt it by revising some assignment. Adjusting an assignment may do one of two things. First, as noted above, changing an assignment might change what kind of analytical task the student is to perform. For example, instead of simply evaluating alternatives, the student might be asked whether the symptoms found in the case are indicative of other problems beside the one already identified. Second, altering the assignment may introduce new or more complex concepts to the case (see previous slide). For example, the "new" or revised assignment might require students to consider what financial implications should be considered before making some marketing decision.



This slide pulls together information from slides #35 and #36 and summarizes the points made earlier about concepts and analytical tasks.

By changing the assigned task, the case might now address different analytical tasks and/or case concepts. That is, the case can be adapted to deliver different training objectives. Also, the difficulty of the case might be impacted. This might require the professor to offer students some additional support (e.g., outside readings) to assist them in realizing the teaching objectives.

Note that in the slide above that by analytical tasks vary from few (e.g., evaluate the solution only) to many (e.g., work from the symptoms found in the case to define the problem/alternatives and arrive at a final solution). Case difficulty increases as more tasks are required of the student. Also, moving from simple to complex to multiple concepts increases the level of case difficulty.

<u>Additional Notes</u>