Case Teaching Coursebook

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1   Introduction

1.1   Brief Introduction about Teaching Cases

A teaching case is a description of an actual (or true-to-life) business situation or an account of a sequence of events, which raises issues for discussion and/or problems for analysis and solution. It is often a problem, a challenge, or a dilemma that a decision-maker has to address within an organisational context. It brings the challenges of real-life business situations into the classroom to engage students in stepping into the shoes of today's business professionals, or as Professor Malcolm McNair (formerly of Harvard Business School) stated, it proposes the notion of the 'willing suspension of disbelief' that our students are in the classroom and enables them to consider their own perspectives within the narrative of the case situation. The challenge for the case tutor or discussion facilitator is to guide the student/participant through a 'journey of learning' by offering carefully crafted questions with sensitive listening and constructive responses.

1.2   Some Statistics about Teaching Cases

Case studies are used at different fields of management education. Frequencies on subject category are shown Figure – 1.
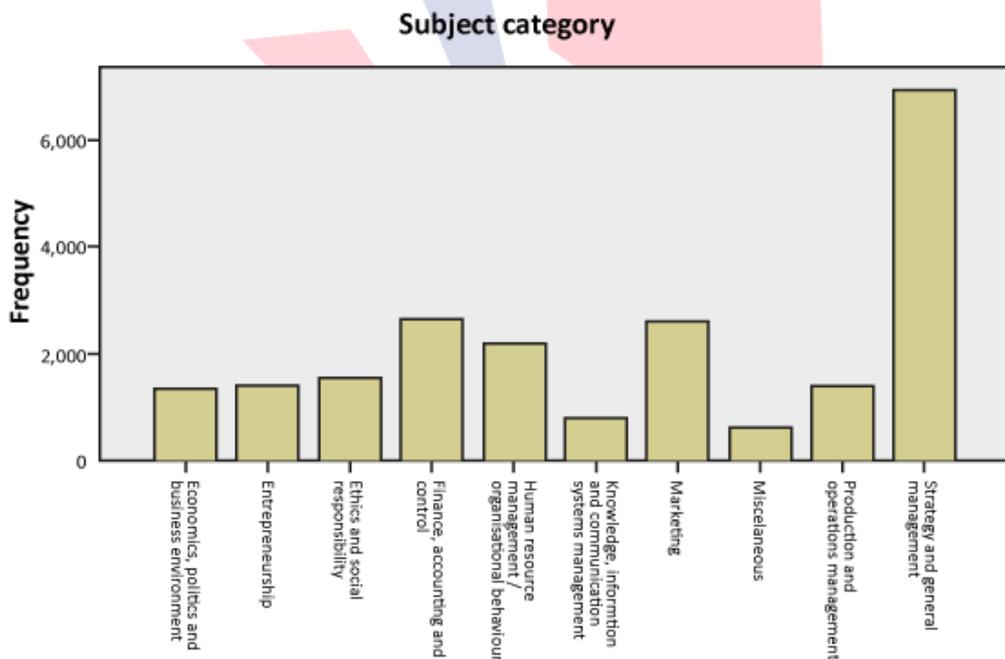
Figure – 1

Source: What Drives Case Sales, 2009 © IMD International

Figure – 2 shows sources of cases according to continents. Most of the teaching cases are stories from organizations at North America. It is nearly two times more than second the closest continent.

Continent from country
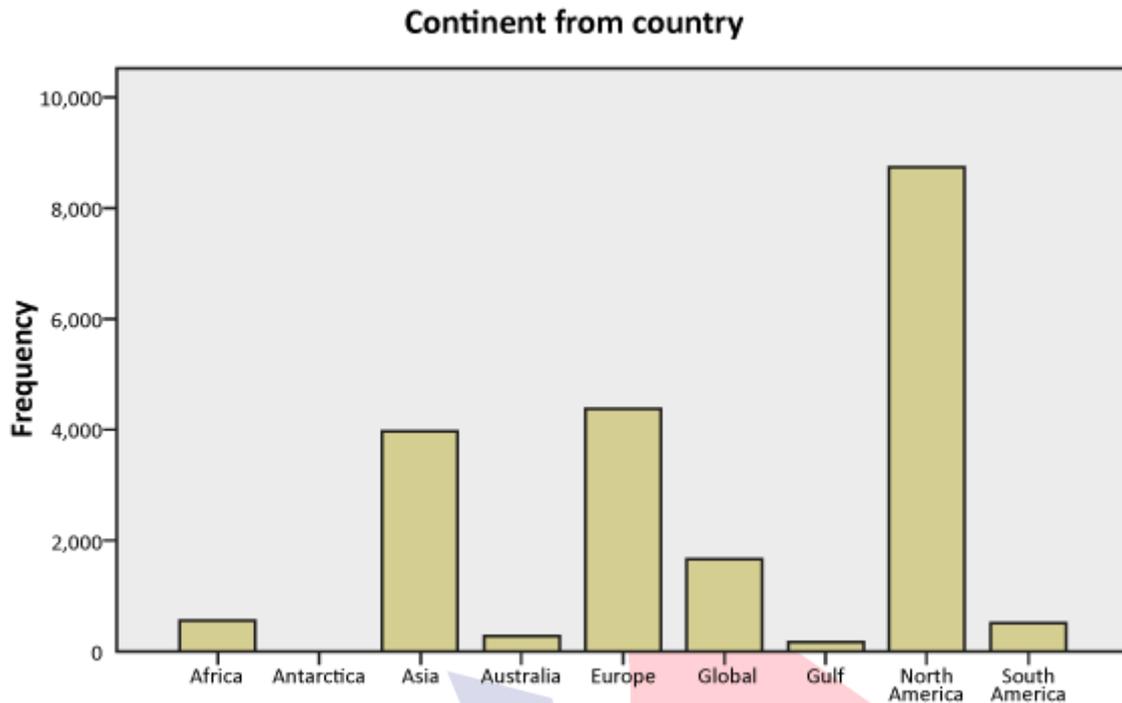
Figure – 2

Source: What Drives Case Sales, 2009 © IMD International

Most of the organizations used in teaching cases are from big organizations as shown in Figure – 3.

Whether a firm is big (F1000, g500) or not

- Firm not in the F1000 or G500
- F1000 or G500 Firm
- Firm not specified
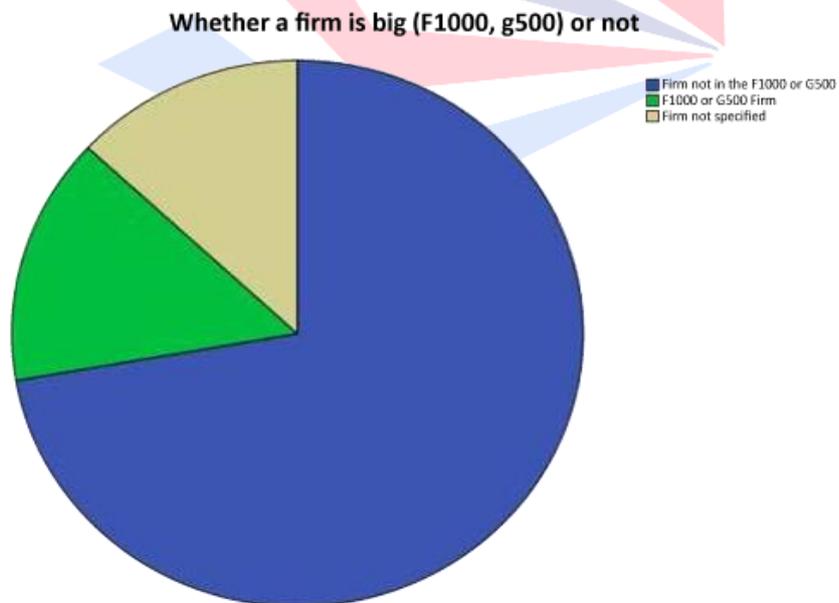
Figure – 3

Source: What Drives Case Sales, 2009 © IMD International

Teaching case writers gather data regarding organizations from different sources. Figure – 4 shows most common data sources about case writing.

- Field research: 50,4%
- Generalised experience: 4.8%
- Published sources: 35.1%
- Unspecified: 9.7%

Source

■ Field research
■ Generalised experience
□ Published sources
■ Unspecified
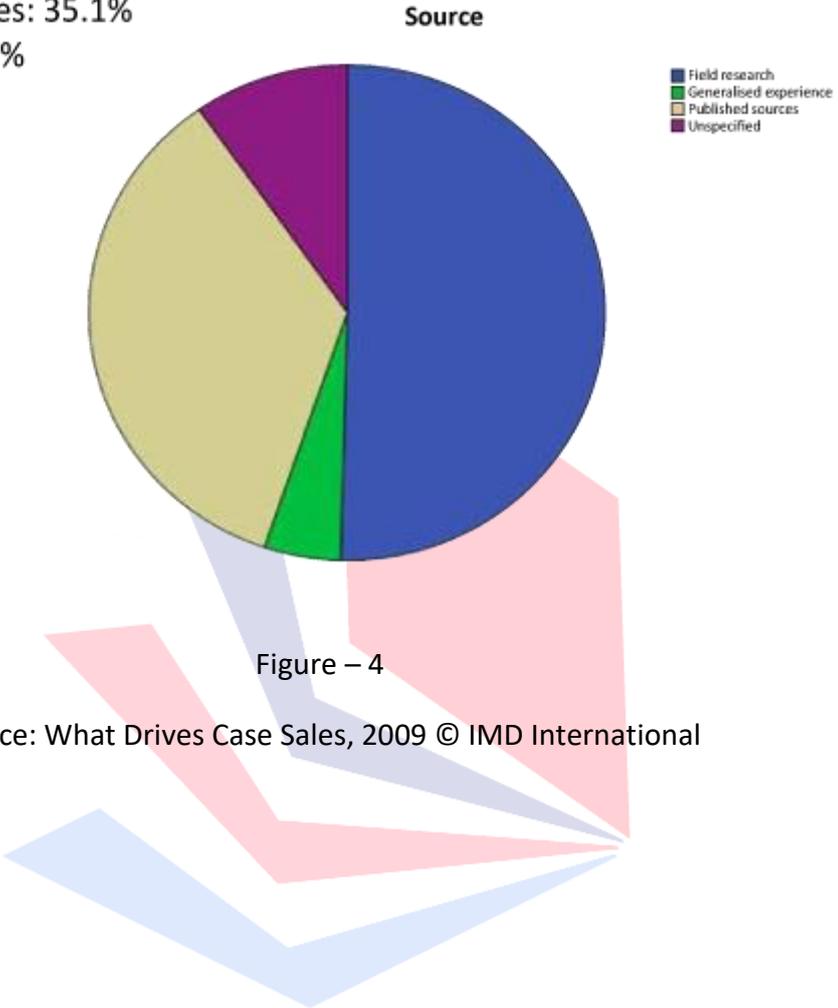
Figure – 4

Source: What Drives Case Sales, 2009 © IMD International

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2   Types of Case Study

Case studies can be classified and segmented in many different ways, but a common approach is to look at the size, scope, content, and purpose of the case; from which six distinct types can be identified. It is reasonable to assume that any one particular case study may exhibit factors which link to more than one type from the six listed below:

2.1   The Incident Case

This is a very short case that describes a single incident. It can be used during a lecture or lesson to illustrate a concept or raise an issue for discussion. It can be read quickly and normally needs no pre-class preparation by students. Case incidents can be useful way of introducing students to the case method.

2.2   The Background Case

The main purpose is merely to impart information in a way that has greater interest than a conventional reading or handout. The student identifies more readily with data presented in case form than he/she would with an impersonal document. A typical background case can be used as a framework within which other cases explore specific issues.

2.3   The Exercise Case

This provides an opportunity for the student to apply a specific technique and is widely used where quantitative analysis is required. The manipulation of numerical data within the context of a real situation is more interesting for the student than the use of the same skills as a purely academic exercise.

2.4   The Situation Case

This is the type usually envisaged when the term 'case study' is mentioned. The student is asked to make an analysis of the information embodied in the case and to delineate the significant relationships existing among the various items of data. This often involves the question 'why did things go wrong and how could this have been avoided?'

2.5   The Complex Case

This is a development of the situation type where the significant issues are immersed in a mass of data, much of which is irrelevant. The problem for the student is to distinguish the vital issues from a number of superficial ones, which serve only to distract the attention. A further complication is that the embodied issues may be interdependent.

2.6   The Decision Case

This goes a step further than those listed above. Here the student is required to state what he/she would do in the circumstances described and to formulate an action plan. In order to

do this the student must develop a variety of feasible approaches and then exercise judgment in selecting that which appears to have the highest probability of success.

3   Functions and Anatomy of a Teaching Case

The case can be designed in many different ways and structured to serve many different functions. It is important for the case tutor/facilitator to consider a range of different questions (listed below) which relate to function and anatomy before selecting the most appropriate case for their student group.

3.1   Functions

To create interest, foster curiosity, stimulate thought and discussion.

To promote awareness, recognition and understanding.

To challenge, test, frustrate and prove.

To persuade, motivate and inspire.

To inform, reveal and communicate.

To bring a 'slice of reality' into the classroom.

To provide a context in which to:

- Test theories, techniques and procedures
- Explore ideas, identify relationships, make discoveries, formulate hypotheses
- Practise and develop analytical, judgmental, and social skills.

A teaching case has little or no merit in isolation. It is simply one component within a teaching or learning situation. Its purpose is to connect with other components in the situation, to establish linkages, and trigger activity within and between students and the tutor.

3.2 Anatomy

Setting

Where the story takes place   familiar to learners   unfamiliar

Topic

What the story is about   familiar to learners   unfamiliar

Issues

Matters embodied in the case   few   independent
                                         many   interdependent

Data

Information embodied in the case   little   explicit
                                         much   implicit

Treatment

Mode of thinking required   deductive   convergent
                                         (apply theory)   (analytical)

                                         inductive   divergent
                                         (develop theory)   (creative)

Analysis

Type that can be achieved   closed   open
                                         (one answer)   (several possible)

Discussion time needed   short   long

4   Some Tips about Teaching Cases

One of the most important responsibilities of the case is to 'tell a story;' and therefore in order to tell it well the narrative needs to captivate the learner, enabling the 'willing suspension of disbelief' as mentioned earlier. To do so, the tutor/facilitator needs to avoid unnecessary or inappropriate approaches that can impose barriers to learning; a few of which are summarized below:

4.1   Barriers to Case Clarity

1. **Jargon**

   He had an ***Oedipus complex***.

2. **Acronyms**

   As a medium, her ***ESP*** was put to good use.

3. **Misplaced expressions**

   I hope I have enough compassion to avoid making people redundant ***if necessary***.

4. **Abstract nouns**

   The public lacks an ***understanding*** of the ***inevitability*** of ***exhaustion*** of North Sea oil.

5. **Strings of nouns**

   This article examines ***government property tax reform proposals***.

6. **Strings of prepositional phrases**

   She had read ***of*** the achievements ***of*** the Irish ***of*** the southern regions ***of*** New England.

7. **Subordinated clauses**

   If universities admit all students ***who*** apply, they will admit many ***who*** are not capable of studying at university level, ***which*** will force them to withdraw when they find they cannot cope, ***which*** will be a waste of tax-payer's money.

8. **Missing links**

   They want to raise the voting age to 21 ***because of immaturity***.

9. **Postponed verbs**

    Pressure to prevent the building of nuclear power stations and even to close existing power stations *is increasing.*

10. **Passives**

    Your questions *will be answered* by my secretary.

11. **Superfluous words**

    She was unable to buy a ticket at student rates *because of the fact* that she was not carrying her student union card.

12. **Less familiar words**

    The customer service manager *initiated immediate* action in her *endeavor* to *place* the customer.

13. **Writing about the writing**

    The case writer will begin by discussing…

14. **Negatives**

    He knew that *unless* he *failed* to apply within three months compensation would *not* be *denied* to him.

4.2   Case Drafting Hints – A Summary

The following summary relates to both case writing and teaching. A consideration of each of these headings will enable the tutor/facilitator to be clear about the approach that is being undertaken in the classroom and the purpose behind the teaching and learning session.

Objectives

Be clear about the teaching and learning objectives for the case.

Case outline

Produce a case outline, perhaps using headings that will form the main sections of the case. Flesh out this outline, gradually incorporating your accumulated case data. Be prepared to discard irrelevant material even though you have invested time in its collection.

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Case opening

Think carefully about the opening sentence (and paragraph) and its wording. It has an important job to do. It must capture the reader's interest.

Structure

Use McNair's framework of four structures (as listed below) as a guide.

1. **Time structure**

Make it clear when events took place. Use dates rather than words, such as currently, recently, now. Avoid using the present tense (unless in reported speech). When cases are used in class the events they describe will always be in the past, and use of the present tense will then appear odd.

2. **Narrative structure**

An understandable sequence of events: what led to what? Maintain the flow of an unfolding story. A network diagram can be helpful when outlining a case.

3. **Plot structure**

Cases should have an element of drama so use one or more plots to develop and maintain interest. A case must have one or more issues or questions that need to be resolved. These should be significant enough to capture the reader's interest.

4. **Expository structure**

What do you wish to make explicit to readers? What do we want them to discover from their own analysis and/or discussion of the case?

Case difficulty

Can be regarded as having three aspects:

1. **Concepts**

How many? How complex? Introduced through the case or already known to reader?

2. **Analysis**

What methods of analysis are appropriate/necessary for the data in the case?

3. Presentation

How long is the case? How readable? What diagrams, tables or other supplementary materials are to be included?

Keep in mind the sophistication of the target-learning group.

Closure

Reiterate key issues. Remind the reader of the need for a decision, evaluation, formulation of options, etc. what unresolved problems remain?

5   The Case Teaching Note or Map

The crafting of the case data is only half the work of the case author. The teaching note provides a map which the tutor/facilitator can use to guide the learners through the case data, enabling them to achieve both a breadth and depth of analysis, cover interesting and relevant visiting points on the discussion 'journey', and achieve key learning objectives. The map should contain useful questions that are carefully crafted to ensure breadth and depth of enquiry, and hence the learners' progress, across a planned journey in the discussion that enables them to explore, confront and confess, appraise and review, decide and conclude.

The map might also propose alternative pathways that a class discussion could pursue as well as provide additional case resources that the tutor may choose to release to the learners at some point along the journey. A pro-forma for a teaching plan or 'map' is provided below. The formalizing of the map into a Teaching Note provides an opportunity for the author to link the issues raised in the case data with other key reading resources and to identify how the case has been received in previous classroom experiences.
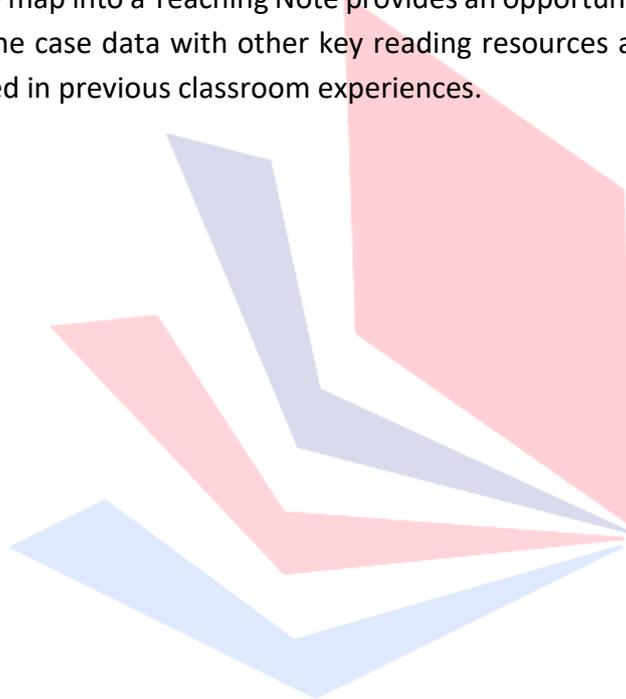
5.1 Case Teaching Plan (Diagram)

Figure – 5

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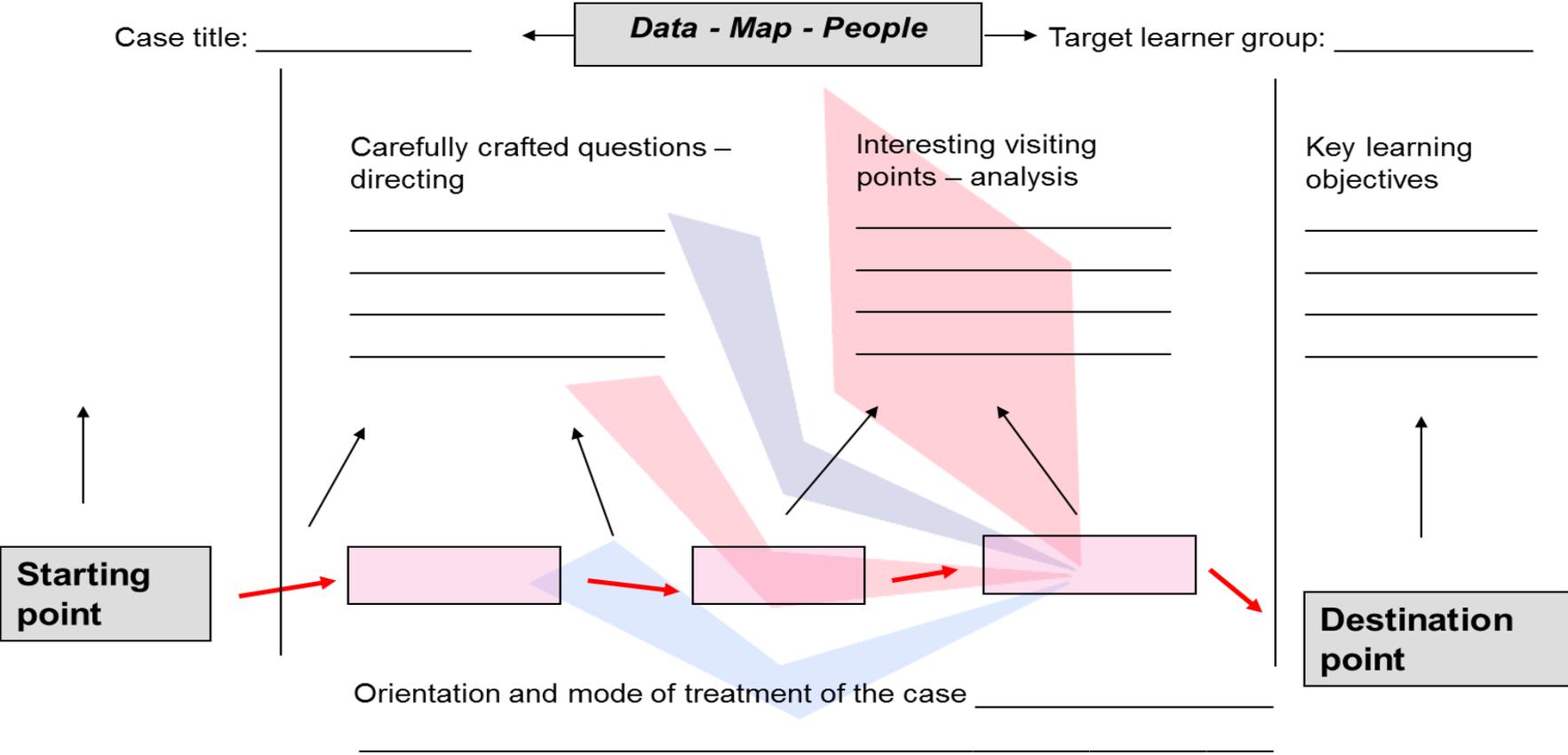
6   Concluding Thoughts

The case method is formed around a student-oriented discussion of a planned sequence of events, drawn from actual (or true-to-life) situations, with responsibility for analysis and conclusions about issues within the case resting with the students.

The case tutor/discussion facilitator's role is seen as one of guiding the student discussion, rather than providing answers.

The focus therefore remains on the students as 'participants,' learning through their own individual and joint efforts.

7 References

- Guide to English Usage, Longman, 1988

- Heath J. 2006. Teaching and Writing Case Studies. 3rd ed. The Case Centre.

- What Drives Case Sales, 2009, IMD International

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