

# TEACHING WITH BUSINESS CASES: IS IT FOR YOU?

Ahmed Maamoun, University of Minnesota Duluth

## ABSTRACT

*A business case is a description of an actual situation, usually involving a decision faced by the decision maker, in an organization. Most likely, a case is based on primary research, interviewing managers and staff. The case method of teaching is the set of educational techniques and “tricks of the trade” that instructors use in the classroom to help students reach particular learning objectives. Students are required to put themselves in the decision makers’ shoes. In the real world, the answers to complex problems cannot be Googled or found in textbooks, nor will everyone agree on the “ideal answers” to difficult questions. Managers rarely have access to all the relevant data pertinent to decisions. Similarly, cases usually do not contain all the information instructors and students would like to have. Therefore, they push students to make decisions with available information (exactly like the business world). The case method prepares business students for the real world that stipulates critical thinking and persuasive arguing skills. The purpose of using teaching cases to aid business students attain analytical and critical thinking skills these specialized policy analysis skills. Many instructors have little use for case teaching and keenly resist its inclusion in their courses. There is a number of reasons for this resistance. One is the importance of being in control via lecturing. Some instructors regard the case method to be “soft,” lacking in rigor. Other instructors feel they have too much material to cover and do not have time to use cases. Or they may feel they do not have the “right personality” to teach with cases. This paper is about the author’s personal experience with teaching with business cases. The pros and cons of the case method will be discussed. The advantages and limitations will be presented. Tips on effective case teaching will be offered.*

**Key Words:** Case Study, Effective Teaching, Effective Learning, Leadership, Teaching Style.

## INTRODUCTION

As someone who has been teaching college since 2003, I believe that teaching is about fostering good habits of critical thinking. Since English is my second language, I have always felt that the students can read the textbook instead of listening to me reiterating whatever concepts and theories from the required readings. It is not telling students what is in the textbook. It is about provoking them to think, to develop skills needed to present and defend recommendations; to argue persuasively for a point of view, while recognizing that no set of strategies is necessarily "correct". Teaching is not about the instructor. It is about learning, aka the student. The instructor’s role is to push students to reach new positions, think critically, question authority, and challenge the underpinnings of theories. Teaching is not a science; it is an art. Teaching excellence involves utilizing this art to create a reciprocal relationship between the instructor and the student. Not all teaching should be done by the instructor. Not all the learning should be done by the students. And here is where the case method comes in. It is a decent vehicle to get both instructors and students

to learn. The passive reception of notions or information constitutes little or no education at all. In other words, the student must actively get involved in the learning process. The process is nothing like absorption or fitting factual tidbits into a pattern; it is about creativity and critical thinking.

### **WHAT IS A CASE STUDY?**

A case is a description of authentic circumstances, usually involving a decision faced by the decision maker, in an organization. Most likely a case is based on primary research, interviewing managers and employees. The beauty of a case, in my opinion, is that it is not an arm chair thing. The case method of teaching is the set of academic techniques and “tricks of the trade” that instructors use in the classroom to help students reach explicit learning objectives with the case study as a basis for discussion. In the real world, the answers to challenging problems cannot be found in textbooks, nor will everyone agree on the “right answers” to complex questions. The case method prepares students for a business world that requires critical thinking skills and the ability to develop sound arguments. Students are exposed to the real business situation and have to think like the decision maker and come up with solutions and recommendations.

The idea of using cases in college education probably originated at the Harvard Law School around 1870, and by 1910 all the leading law schools used “case method teaching” (Kimball 1995). The second school to adopt the case method was the Harvard Business School during and after the First World War. Then the case method became popular in business education in the 1930s and 1940s. In subsequent decades, other professional fields began adapting case teaching to their own teaching curricula. Case teaching is also used in arts and sciences tutoring at graduate, undergraduate, and even secondary levels of schooling.

Christensen’s definition of a teaching case, although developed for business school use, is certainly encompassing: “A case is a partial, historical, clinical study of a situation which has confronted a practicing administrator or management group. Presented in narrative form to encourage student involvement, it provides data—substantive and process—essential to an analysis of a specific situation, for the framing of alternative action programs, and for their implementation recognizing the complexity and ambiguity of the practical world” (Christensen & Hansen, 1987). For me a business case is essentially a short story that involves several different levels of analysis, so it can be about a manager, it can be about a company, or it can be about an industry. The story may or may not have an ending (decision) and if it doesn’t have an ending, the students will be required to come up with the ending and think like the manager in the story and make the best decision possible. That’s what a business case is. And instead of having characters that are fictional it has managers and decision makers that are involved in some sort of business activities.

The purpose of using teaching cases to help students acquire these analytical skills is threefold: 1) To help students acquire the habit of questioning the underpinnings of theories and their relevance to the business world. 2) To encourage students to use the terms and concepts they learn in the classroom to analyze and solve business problems. 3) To familiarize students with the intellectual and experiential basis of decision making, evaluation, implementation, and control. Some instructors emphasize group interaction or problem solving, that is, discussion and persuasion, group dynamics and teamwork, or other processes that prepare students to cope with

the context-dependent, ambiguous, interdisciplinary nature of the real world. Other instructors emphasize intellectual performance, the quality of conceptualization, reasoning, data analysis, and argument demonstrated by students. Case analysis in legal education underlines analogical reasoning and the formal logic of applying rules to facts. Cases in clinical medical practice underscore the mastery of scientific thinking in the light of patient symptoms and conditions. Cases in administration and policymaking highlight associative reasoning and pattern recognition, the interpretation of complicated bodies of information through the lenses of heuristic models (i.e., synthesis, intuition, judgment, and application). The challenge for business schools lies in creating rigorous learning environments to nurture knowledge, skills, and attitudes which enable students to become responsible business leaders. These powerful learning environments which stimulate problem-based and action-oriented learning require a non-traditional instructor who coaches the students along critical thinking and towards insightful exploration.

Though the case method is well established in countless instructional programs, it remains deeply controversial in many others. Many educators have little use for case teaching and actively resist its inclusion in courses and classes. There are various reasons for this resistance. One is the importance of establishing the legitimacy of one's own methods. In scientific realms, where the lectures, problems, and laboratory exercises are the primary means of teaching, the case method may appear to be "soft," lacking in rigor. In the "legitimate" university or professional school, faculty present a body of knowledge that students are required to repeat on demand. The author acknowledges these concerns and suggests teaching with cases to supplement the conventional teaching methods of lecturing and problem solving. The role of the instructor is to be a creator of challenging learning environment which allow the students to not only acquire valuable business knowledge and skills, but to develop their personality towards superior business leadership thus molding the future direction of the 21st century. In a way, I see business instructors -including myself- responsible for averting the next bubble or recession! If business students across the world are taught to make the "best" decision in any given situation, the likelihood of a recession or economic slowdown could be reduced. Sound far-fetched? Well, these business students will make decisions that will shape the world economy and play significant role in financial institutions and shape public policy for decades to come. The most candid and clear framework for business schools to take students' education seriously is the Principles for Responsible Management Education (PRME) which were issued in 2007 by the UN Global Compact (Appendix A). The PRME can be seen as a manifesto for business schools to "help shape the attitudes and behavior of business leaders through business education, research, management development programs, training, and other pervasive, but less tangible activities, such as the spread and advocacy of new values and ideas. Through these means, academic institutions have the potential to generate a wave of positive change, thereby helping to ensure a world where both enterprises and societies can flourish" (PRME, 2007). The next sections are dedicated to ideas and tips to make the most of the case method.

### **TEACHING AND THE CASE METHOD: PREMISES AND PRACTICES**

- Does working in teams produce a better learning environment? From experience, the answer is: Yes. However, I have found that size matters! The smaller the class, the more

effective the case method is. That's why I avoid using cases in the large core classes and save them for electives. Students are more mature and can admire the teaching method. Eight groups each with four or five students would be ideal for improving critical, analytical, and reasoning skills.

- The positioning of the case within the course is imperative. I typically position the case to supplement the chapter discussed. For example, if the most recent chapter was primarily on "Targeting" or "Segmentation", students will relate to the case more if the decision pertained to these topics. Instructors will be in a better position to convey essential facts, information, and improve intellectual understanding of theories and their applications.
- Proper preparation is required to make case teaching and learning effective. This is a twofold process: both the instructor and the students have to be prepared. Preparation goes beyond reading the case! Reading the case thoroughly several times is a good start, but is not enough. Taking notes, thinking critically, answering the case questions are further steps essential for proper preparation. Having the students do that before coming to class is something I have struggled with for years. Instructors can overcome this by assigning more points to class participation during case discussions. A better approach is to instill a fun and exciting atmosphere when discussing cases. There might appear to be an enigma in the view that unplanned discussion requires careful preparation. Case discussion features spontaneity, revelation, and the discovery of new conduits to learning. How can an instructor prepare for a spontaneous discussion? The answer lies in a subtle but vital difference between preparing for a lecture, where instructors plan what they will say, and preparing for a case discussion, where they envision what students might venture to. The case preparation guidelines used by the author are shown in Appendix B.
- Teaching notes or instructor's manuals are materials intended to be helpful for instructors. They should make the instructor's life easier. However, they should be kept from students' eyes. The quality and rigor of teaching notes will vary significantly from one author to another. Most of the time, you will have to tweak it or even write your own. I tend to answer the case questions before even checking the answers in the teaching note. This helps provide a more personal approach to the case discussion.
- Put the students in the driver's seat. These bright young men and women will be decision makers on the ground in the near future. I usually start the discussion by saying something like: "If you were in the position of ... What would be your analysis? What would be your alternatives and which one would you select and why?" This approach gives the students the necessary confidence to put themselves in the shoes of the decision maker and make the best decision given the available information. Establishing a baseline or a starting position is helpful. A case typically requires students to reach a decision or conclusion. The instructor may want to start the class by polling students concerning their initial judgments. For example, the instructor may say: "How many of you would [take action X]?" This

approach will divulge the inconsistency in students' views, and will more importantly highlight the significance of reaching a decision or conclusion. The instructor/facilitator may also want to play a role and ask students to respond to them as a role player. One version of this technique is for the instructor to play the devil's advocate to provoke students to think and go outside the box. This should stimulate interest in or curiosity about a subject or problem, and enhance "appreciation" of unfamiliar issues or material.

- Maintaining order is crucial. There has to be a reasonable degree of class discipline. Not all participants can talk at the same time. If one group is presenting a case, their classmates must listen. Without order in the classroom, it is impossible to conduct a productive case discussion. The role of the instructor can be compared to the role of an orchestra conductor. There will always be some disruptive students. Some participants, especially older or more experienced ones, may have the desire to show off, establish credentials, and send the message "I really don't need to be here" to the instructor and the class. One method to handle such interruptions is to think of the disruptive student as a "resource person," asking them a difficult or probing question that tests their expertise or wisdom. The instructor may also want to play devil's advocate and demand elaboration or supporting analysis. The bottom-line is that instructors cannot allow a show-off or a disruptive student to dominate the discussion or intimidate his/her classmates. The instructor should try to contain or redirect the energies of such individuals without showing disrespect or frustration.
- Humor in case discussion adds value and creates a fun atmosphere. Humor can originate with the instructor and can be planned or spontaneous. Humor is an integral part on an instructor's personality and teaching style. I try to think of funny incidents that happened to me while preparing the case that might be relevant to the case discussion. Every class will have students who see the funny side of a situation. Such contributors are a wonderful asset and should be motivated to add a positive and exciting class atmosphere in which cognitive and analytical learning take place with a cheerful attitude. The instructor's personality/temperament makes all the difference in the world. It is often thought that good case instructors are gifted with a broad range of talents, including stand-up comedy. A successful case instructor is outgoing, witty, and have the personality of an entertainer! Dynamic, witty, and funny instructors are more appealing and are likely to have their input retained by students more readily than even-tempered, stern, and dull ones.
- Remembering who said what and in what context is a great way to tie things together. One of the most valuable skills or talents associated with closing a case discussion is auditory memory—the ability to recall what has been said during an argument and who has said it. The importance of this skill is not limited to closing, but it is certainly helpful then. If the instructor is able to identify certain comments and ideas with their originators or if the instructor is able to recall who initiated or contributed to a particular discussion, they would be endorsing the importance of individual contributions. Another crucial closing skill is the ability of the instructor to withhold their own opinions or judgments while allowing

students to develop their own. If students cover all key issues without intervention by the instructor, that is a bonus. If their perspectives are limited or faulty, the instructor steps in or even play devil's advocate, ask challenging questions, and provoking them to think critically. Appendix C lists some generic questions instructors can use to prompt discussion and make it flow naturally.

### **TEACHING AND THE CASE METHOD: RESISTANCE AND CONCERNS**

- Conventional teaching is typically lecture based, with the instructor performing from a position of power or expertise. The instructor alone decides on the topics, issues, or material and knows for the most part how the discussion (if any) will flow. Knowledge is solely the asset of the instructor and flows one way: from him/her to student. The instructor is the focus of attention and is always in control. Conversely, case teaching is mostly discussion based. The instructor knows more than the students, but this knowledge is not definitive as students are expected to contribute to their own learning. Both the parties have the responsibility to foster a sound learning environment. Students are usually the epicenter of attention, and the instructor and students share control over topics being discussed. Some instructors are old school and adopt the rigid notion of: "I am expected to teach. Students look to me for my knowledge and expertise". Such instructors feel that the case teaching method would take away from their status and authority. Involving students in an open discussion rather than standing up there and lecturing the whole time is a scary idea to many educators. They will use arguments like: "It's inefficient. It takes too much time to get to the point", to justify distancing themselves from case studies. It is true that instructors may reach their points quickly in a lecture, but the question should be: Are they bringing their students along with them? The classroom discussion that is the essence of case teaching is intended to move students in a demonstrable way toward the points that the instructor seeks to emphasize. The premise of case teaching is that a larger number of students will be advanced toward instinctive mastery of complex ideas if they are actively engaged in discussion than if they are passive listeners or receivers.
- Many instructors acknowledge the merits of the case teaching method but use the lack of time argument to avoid using it. It is true that as educators we have an academic responsibility to cover the syllabus and make sure the relevant topics and theories present in the text book are thoroughly covered. This means less time is left for hands on discussions and debates. Some instructors could say: "I would teach with cases but I have too much material to cover". The counter argument is that success in covering material may occur at the expense of students' cumulative learning or understanding. Exposing students to ten topics, at which point they master two or three may be less effective than exposing students to five topics and taking the initiative to verify that most students have learned all five.
- As mentioned in the previous section, teaching with cases requires a certain personality: a combination of a public speaker/comedian/entertainer/leader/policeman/scholar. Some

instructors may correctly argue: “I don’t have the right personality”. Engaging students actively in the kind of give-and-take discussion that is at the heart of case teaching does indeed involve more aspects of a teacher’s personality than simply standing there and delivering a premediated lecture. However, I would argue that many aspects of effective case teaching could be acquired through experience as long as the instructor has a genuine interest in engaging their students and listening to and valuing their comments and opinions.

- To concur the previous point, some instructors recognize that they can learn how to use the method but would contend: “I don’t have time to learn how to do case teaching”. Obviously, teaching with cases requires some investment of time, effort, and trial-and-error experience. This is true with any instructional method per se, including the creation and delivery of a lecture. Any teaching vehicle requires effort and skill if it is to be effective. I believe any reasonable instructor would vouch for that. It is true that case teaching is not easy. Leading case discussions and promoting learning through the use of cases requires special skills such as skill in discussion leadership, patience, and the ability to sum up or illuminate without taking control of the learning process.
- Some instructors use their students as an excuse to avoid using case studies in their classes. “I teach undergraduates. My students are not mature or responsible enough to learn from cases”, they contend. The case method has been extensively and effectively used in a variety of subjects with high school students. Therefore, maturity cannot be the issue. Teaching “inexperienced” or younger students requires the instructor to select cases with which their students can relate to and patiently show them the way to learn from such cases.

### **CASE TEACHING STYLES**

The instructor, as a human being, has a unique personality. This personality usually carries over into their teaching style. I am not in a position to imply that one style is better or worse than another. However, I can contend that style is an important element in teaching with cases as it encompasses the personality of the instructor as well as his/her vision of the learning process. Every case instructor must decide on their own teaching style: “What role am I going to play in the educational process and how am I going to execute that role?” For example, an instructor may choose to be merely a “facilitator”, holding that students are responsible for their learning and they should derive conclusions and make decisions on their own. On the other hand, an instructor may choose a “demonstrator” role who takes care of all the learning.

An instructor’s teaching style would fall somewhere between these two extremes, and their personality will figure out a middle ground determining the shared responsibility for learning with students. Some instructors will lean more towards the demonstrator role and adopt a dominant teaching style. Others would move towards the facilitator role and give students more freedom to contribute. It is also possible that the same instructor may move from one role/style to another depending on the position of the case in the course, the case difficulty, the time available, the level

of students, and the learning objectives. For instance, an instructor may adopt a more dominant role at the beginning of the semester and then move to a more liberal mode towards the end of the course as students gain confidence and accumulate knowledge. In brief, even within one class an instructor might use several teaching styles.

## CONCLUSION

A case is a description of an actual situation, usually involving a decision, a challenge, and opportunity, a problem, or an issue faced by decision maker(s). It is based on primary research and field data. There are different ways of dealing with the challenges inherent in the case method. Every instructor needs to find their own “comfort zone”. Preparation is the key. Although some instructors might worry that extensive preparation can lead to a rigid and structured teaching approach, usually it is quite the opposite as flexibility is enhanced by preparation. Sound preparation by both the instructor and the student is the stark requirement for effective case teaching and learning.

The process of case teaching becomes a natural one over time. Instructors can excel in that field regardless of their personality and style. The key is to invest the time and energy to prepare and be dedicated to students’ learning. There is no one best way to teach with cases. Instructors complement each other. It would be very tedious if all educators followed identical practices and used the same teaching styles in the classroom. Then they would become teaching machines or robots. Nothing is more detrimental to the learning process. The world is changing, as never before, and case studies could be imperative conduits as regards to how business schools can provide a relevant and meaningful education geared towards a rounded understanding of the real world.

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## APPENDICES

### Appendix A: The Principles for Responsible Management Education

**Principle 1 / Purpose:** We will develop the capabilities of students to be future generators of sustainable value for business and society at large and to work for an inclusive and sustainable global economy.

**Principle 2 / Values:** We will incorporate into our academic activities and curricula the values of global social responsibility as portrayed in international initiatives such as the United Nations Global Compact.

**Principle 3 / Method:** We will create educational frameworks, materials, processes and environments that enable effective learning experiences for responsible leadership.

**Principle 4 / Research:** We will engage in conceptual and empirical research that advances our understanding about the role, dynamics, and impact of corporations in the creation of sustainable social, environmental and economic value.

**Principle 5 / Partnership:** We will interact with managers of business corporations to extend our knowledge of their challenges in meeting social and environmental responsibilities and to explore jointly effective approaches to meeting these challenges.

**Principle 6 / Dialogue:** We will facilitate and support dialogue and debate among educators, business, government, consumers, media, civil society organizations and other interested groups and stakeholders on critical issues related to global social responsibility and sustainability. We understand that our own organizational practices should serve as example of the values and attitudes we convey to our students.

### Appendix B: Case Presentation Guidelines

Each group in the class will be assigned to present one case and lead the discussion about that case. The purpose of your presentation is to lead the class through the analysis required to make an informed decision about what the retailer should do.

The structure of your presentation should be as follows:

- **History:** The history, development, and growth of the company over time.
- **Problem identification:** Clearly state the primary problem(s).
- **Analyses:** Conduct analyses that you feel will give additional insight into the current problems or that will help identify possible solutions. Possible analyses include external analyses of the general and competitive environments, identification of threats and opportunities, internal analyses that include evaluating strategic plans, financial indicators, and current strengths and weaknesses.

- Conclusions about discussion topics: Use the analyses you conducted to lead a discussion centered around each discussion posted for your case.
- Update on case: If possible, research what has happened since the case and report it to the class.

The format of your presentation should be as follows:

- You may use whatever form of media you wish – PowerPoint, the whiteboard, videos, role playing, games, etc.....
- You must make this an interactive session. You are required to call on your fellow students during your session, ask questions, and get them engaged. Also, other interactive exercises are encouraged. Everyone learns more if everyone is involved. Be creative!
- Your presentation / discussion should last at least 30 minutes, and no more than 40 minutes.
- You must answer all the case questions. Again, engage your audience while doing that.
- You DON'T have to turn in a summary of your presentation.

Grading will be based on:

- The clarity of the problem identification
- Use of Strategic Analyses:
  - Accuracy of concepts (appropriate use of terminology, application of concepts)
  - Strength of logic / argument (synthesis of materials, personal contribution of ideas)
  - Strength of support (completeness, depth and relevance of material)
- Completeness in discussing the questions related to the case
- Organization of the presentation (consistency across different sections, and engaging the rest of the class in a discussion of issues and alternatives)

## Appendix C: Generic Questions during Case Discussion

### Generic Process Questions

- Why? Can you explain it differently?
- Would you mind repeating what you just said?
- Would you like to add anything to what you have said?
- Is this what you meant to say?
- Do you agree/disagree with what your classmate said?
- Who would like to speak next?
- Who has something different/new to add to what has already been said?
- Who would like to summarize or conclude?
- Is it time to move on?
- How much time do we have left?
- Do we have enough time to ....?

### Generic Analytical Questions

- What is the issue?

- How important is this issue?
- What position are we supposed to hold?
- Why did this issue arise?
- By when does it have to be resolved?
- What is your analysis?
- What alternatives do you suggest?
- What are your decision criteria?
- What is the best alternative?
- What outcome do you predict?
- What is your action/implementation plan?

### **Generic Conceptual Questions**

- Which theory(ies), concept(s), tool(s), or technique(s) is (are) applicable or useful?
- Which theory(ies) might be relevant?
- Who can explain what relevant theory(ies), concept(s), technique(s) is (are)?
- What have you learned in this course (other courses) this year (in previous years) that might be applicable?
- What does the textbook (article, reading) say?

### **Generic Presentation Questions**

- What information is there in the case to support this?
- Where in the case is there information regarding this?
- What information in the case is relevant to this issue?
- What information is missing?
- What assumptions have you made?