

August, 1998 - James W. Lawson, Management/Marketing

Case studies have been used for many years for teaching business subjects. Used properly much learning can take place. Misused, valuable time can be wasted, frustration sets in and overall despair results.

This teaching tip discusses the nature of case studies, how they are developed and their strengths and weaknesses in the classroom. It contains suggestions for dealing with deficiencies alleged to be inherent in the case method. It ends by dispelling the commonly held myth that case teaching is for business subjects only.

Business cases describe organizations from a variety of perspectives such as finance, marketing, information systems, research and development and production/operations. Complex cases look at multiple perspectives near-term to well into the future. Such cases are often used in business strategy and policy courses.

Cases enable students to analyze business situations, define and solve problems and make decisions to enhance organizational effectiveness and efficiency. Cases are based upon real situations which are investigated and reported by the casewriter. Furthermore, cases are related to academic concepts, principles, tools and techniques. Teaching notes bridge the gap between the situation described and the related academic literature.

Today published cases are required to be peer reviewed which often includes scrutiny by practitioners. Frequently, workshops are used by casewriters to upgrade their case drafts prior to peer review.

Cases must contain sufficient information so that students do not necessarily have to consult external sources to analyze cases satisfactorily. However, cases do not have to be long to be of high educational value. Some of the best cases are one to five pages with extensive teaching notes to assist the instructor.

The ability of cases to stand alone as representations of reality separates cases from critical incidents or vignettes. The latter raise issues to which insufficient information is given to resolve the dilemma. The result is often an open-ended discussion rather than a case-solution experience.

Cases are typically used for demonstration purposes, homework assignments, class discussions, examinations, class presentations and role plays. They may be analyzed by individual students or groups. Some cases are geared toward undergraduates, and others are aimed at graduate students. There are also some cases aimed at both cohorts. Authors typically provide guidance at the beginning of their casebooks as to the student levels to which the cases are

aimed. It is imperative that the instructor select appropriate cases for the students to study.

Although the advantages and disadvantages of using cases for teaching purposes are dependent to a large degree on conditional factors such as student knowledge, skills, abilities and interest and instructor past experience and teaching objectives, the following advantages of case teaching have been observed:

1. Requires case concepts to be applied to real life situations.
2. Improves written and oral communication skills.
3. Strengthens student analytical, logic and synthesis skills.
4. Often requires students to integrate concepts, principles, tools and techniques from various disciplines.
5. Requires students to "think on their feet."
6. Enhances student time management skills.
7. Tests and validates student progress.
8. Provides variety in course pedagogy.
9. Can easily be augmented with other teaching approaches especially the use of guest speakers, videos and computer simulations.
10. Can help instructors to get to know students well.
11. Can aid students in career choices.
12. Can help identify research interests.
13. Can improve information search capabilities including use of the Internet.
14. Can improve team member contributions.
15. Can simulate future on-the-job tasks.
16. Can be entertaining.

Disadvantages of case teaching can include:

1. Student grapevine limits reuse of cases.
2. Appropriate cases are sometimes difficult to find.
3. There is a shortage of short cases relative to demand.
4. Too consuming of class time.
5. Lack of necessary industry knowledge among students.
6. Student complaints particularly from weaker students.
7. Poor and unfair teaching evaluations.
8. Very stressful and time-consuming especially for students with poor reading skills and ESL difficulties.
9. Lack of sufficient breadth to illustrate course elements.
10. Difficulties in judging individual contributions to group analyses.
11. Too long for in-class examinations.
12. Hard to judge in-class examination time required.
13. Difficult to grade.

Some case disadvantages can be offset by allowing students, within parameters, to select the case and for the instructor to introduce the case in class. Read the case and associated teaching note carefully and thoroughly before introducing the case to students. Insist that students comply with outside case reading assignments; otherwise valuable class time is sacrificed, and a full class discussion is not achieved. Give students a worthwhile direction to pursue in their analyses. At the beginning of each case analysis insist that students be issues-oriented rather than solutions-oriented. Demand that assertions and positions be rigorously supported by case facts and course content. Melodramatics which demean the student, practiced at some elite universities, cause more harm than good. Leave them out. More is to be gained by nurturing and facilitating. Carefully design tests to suit specific teaching objectives. Do not underestimate test-time requirements. Be enthusiastic, it's catching.

Finally, I would like to dispel the myth that the case method of teaching is only applicable to the business disciplines. Nothing could be further from the truth. As management guru, Peter Drucker, has alluded to many times, "business is the liberal arts." Therefore, case studies certainly have a place in the liberal arts.

A case can be embodied in any human endeavor involving one or more systematized bodies of knowledge. A case can be developed around two theologians arguing about the concept of a supreme being, philosophers speculating about certain ethical issues, scientists interpreting data, engineers designing a futuristic structure, educators pondering the use of the case teaching method in teaching social studies, historians applying past lessons learned to the present and future, psychologists reviewing a mental disorder in an individual and so on.

Not all cases are aimed at making organizations more effective and more efficient. However, there is certainly a grave shortage of nonbusiness cases. Unfortunately, at this time instructors in the liberal arts who want to use cases in the classroom just often write their own cases or locate suitable cases from the business area and adapt them to their disciplines.

A must read for anyone thinking of using the case method is *Teaching and the Case Method* and its *Instructor's Guide*, both by C. Roland Christensen. They contain, in part, several cases and solutions of cases of interest to liberal arts instructors. I have put my copies on reserve in the O'Toole Library for AY98-99. Please feel free to consult them.