

The use of the case study method in the teaching of management

Daniel Rossall Valentine¹

‘The key to the learning is thoughtful reflection... Managers don’t need more prescription. Prescription in general is the problem, not the solution, because situations vary widely. Managers need description, illustration of alternate ways to understand their world... managers have to share their reflections, to learn from one another’s ideas and experiences. This kind of interaction happens outside the classroom of every management development program. If only it could happen so pervasively inside those classrooms as well.’ (Gosling & Mintzberg, 2004).

‘....even armed with the knowledge that teaching methods are under increased scrutiny, many professors continue to deliver the traditional lecture (perhaps with a few power point slides to supplement). As educators we must recognize the need to update our teaching methods to reflect the growing emphasis on the student-focused classroom’ (Hannay et al, 2010).

‘I hear and I forget. I see and I remember. I do and I understand’
(Confucius (551 - 479 BC)).

¹Chairman of the British-African Parliamentary Association (BAPA), Britain. He may be contacted at dvalentine@ppubs.com

Introduction

Management education is under multiple pressures, pressure from business school leaders for profitability and reputation, pressure from students for clarity, consistency and personalisation, and pressure from employers for relevance. The choice of appropriate instructional strategies is a key aspect of course success and satisfying the demands of multiple stakeholders.

Instructional strategies are one of the three key elements of course design (see diagram). But attempts by college leaders to reform instruction in colleges is particularly hazardous as this creates conflict with instructors who cherish “academic freedom”. Programme directors thus generally leave choice of instructional activities to individual lecturers, but this approach is also fraught with difficulties, as the three points of the triangle need to be developed together. Reform of objectives and assessment without reform of instructional activities will result in courses that fail to achieve their objectives.

This article is aimed at both college leaders and lecturers to encourage them to rethink their instructional strategies, in order to produce graduates of the calibre that today’s business environment requires.

The basic methods of pedagogy can be summarised as follows:

1. The lecture
2. Discussions
3. Writing
4. Group work
5. Class tests and exercises
6. Case study

7. Guided reading
8. Student presentation and mutual criticism

Each of these eight methods has an important role in the business degree – but in this article I will focus on the case study, which is possibly the most integrative teaching method ever devised, as it is a combination of lecture, discussion, group work, guided reading and presentation.

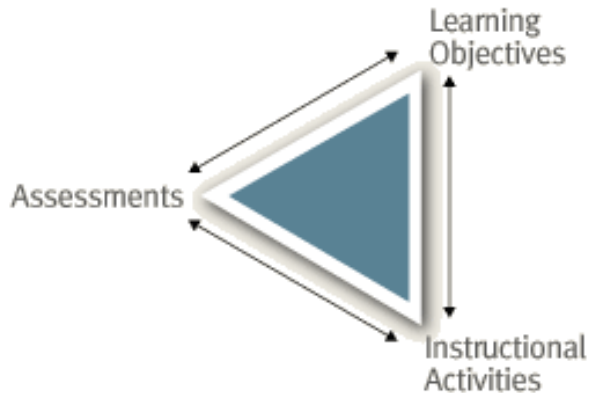
What is a case study?

Case studies are stories. They present realistic, complex, and contextually rich situations and often involve a dilemma, conflict, or problem that one or more of the characters in the case must negotiate.

A good case study, according to Professor Paul Lawrence is:

‘...the vehicle by which a chunk of reality is brought into the classroom to be worked over by the class and the instructor. A good case keeps the class discussion grounded upon some of the stubborn facts that must be faced in real life situations.’ (quoted in Christensen, 1981)

Although they have been used most extensively in the teaching of medicine, law and business, case studies can be an effective teaching tool in any number of disciplines. As an instructional strategy, case studies have a number of virtues. They ‘bridge the gap between theory and practice and between the academy and the workplace’ (Barkley, Cross, and Major 2005, p.182). They also give students practice identifying the parameters of a problem, recognizing and articulating positions, evaluating courses of action, and arguing different points of view.



According to Gragg (1940): ‘The outstanding virtue of the case system is that it is suited to inspiring activity, under realistic conditions, on the part of the students; it takes them out of the role of passive absorbers and makes them partners in the joint processes of learning and of furthering learning. (p. 4).

Case studies vary in length and detail, and can be used in a number of ways, depending on the case itself and on the instructor’s goals:

- They can be short (a few paragraphs) or long (e.g. 20+ pages).
- They can be used in lecture-based or discussion-based classes.
- They can be real, with all the detail drawn from actual people and circumstances, or simply realistic.
- They can provide all the relevant data students need to discuss and resolve the central issue, or only some of it, requiring students to identify, and possibly fill in (via outside research), the missing information.
- They can require students to examine multiple aspects of a problem, or just a circumscribed piece.
- They can require students to propose a solution for the case or simply to identify the parameters of the problem.

According to Davis (1993), an effective case study is one that:

- Tells a “real” and engaging story
- Raises a thought-provoking issue
- Has elements of conflict
- Promotes empathy with the central characters
- Lacks an obvious or clear-cut right answer
- Encourages students to think and take a position
- Portrays actors in moments of decision
- Provides plenty of data about character, location, context, actions
- Is relatively concise

Golich (2000) sees cases compelling students to

- Distinguish pertinent from peripheral information,
- Identify the problem(s) at hand and define its context and parameters,
- Identify a set of possible solutions,
- Formulate strategies and recommendations for action,
- Make decisions, and
- Confront obstacles to implementation.

The case study is a great method for combating the “dualistic approach” that many students have when they arrive at business school (Perry, 1968). This approach seeks the “one right answer”, and is common in students from certain cultures, and also in students trained in the natural sciences. Knowledge, to their mind, is unambiguous and clear, and learning a simple matter of information-exchange. Students at this stage believe the teacher’s job is to impart facts and their job is to remember and reproduce them. In

the study of business, however, this approach cannot last long due to the highly contextual nature of management truth. The case study is the perfect tool to break dualistic attitudes when students realize that experts can disagree and facts can contradict one another. The highly subjective nature of business performance and strategy will cause some students pain, as they begin to leave their comfort zones, but the result will be that the student learns the value of evaluation and qualitative analysis; learning to ask multiple questions and deal with multiple answers.

For many students, the case study will be the first time they have been asked for their opinion in class. It offers a real chance to develop students' communication and interpersonal skills. The focus is discussion, which, as Gosling & Mintzberg assert, is of real importance in the transmission of business understanding:

‘Although there clearly remains a role for lecturing and for leading case discussions, professors should spend less time professing and instead encourage discussion to flow freely along insightful lines developed by the participants themselves... There is a certain quality of conversation that takes place in a well-managed classroom that is almost unique, where the fruits of experience, theory and reflection are brought together into new understanding and commitment’ (Gosling & Mintzberg, 2004)

A suggested process for using a case study

1. **Choose carefully:** For the first case, pick a company that most of the students are aware of. The most popular cases I have used recently are Starbucks, Apple & Nokia. Choice of a familiar target organisation helps to engage the students and get them talking. For subsequent cases,

consider using organisations that the students may not know, as this encourages fundamental research.

2. Give students **ample time to read and think** about the case. If the case is long, assign it as homework with a set of questions for students to consider (e.g. what is the nature of the problem the central character is facing? what are some possible courses of action? what are the potential obstacles?)
3. Introduce the case briefly and **provide some guidelines** for how to approach it. Break down the steps you want students to take in analyzing the case. If you would like students to disregard or focus on certain information, specify that as well.
4. **Create groups and monitor them** to make sure everyone is involved. Breaking the full class into smaller groups gives individual students more opportunities for participation and interaction. You may also want to designate roles within each group.
5. **Have groups present their solutions/ reasoning:** If groups know they are responsible for producing something (a decision, rationale, analysis) to present to the class, they will approach the discussion with greater focus and seriousness. Encourage them to produce an electronic presentation. (This can form a template for an assignment later in the course) Write their conclusions on the board so that you can return to them in the discussion that follows.
6. **Ask questions** for clarification and to move discussion to another level. As the discussion unfolds, ask questions that call for students to examine

their own assumptions, substantiate their claims, provide illustrations, etc.

7. **Synthesize issues raised.** Be sure to bring the various strands of the discussion back together at the end, so that students see what they have learned and take those lessons with them. The job of synthesizing need not necessarily fall to the instructor, however; one or more students can be given this task.
8. You may wish to conclude by **comparing the solutions generated in class with the actual outcome of the real-life dilemma.**

General guideline on using the case study method

- It is important that you, as the instructor, know all the issues involved in the case, prepare questions and prompts in advance, and anticipate where students might run into problems. Finally, consider who your students are and how you might productively draw on their backgrounds, experiences, personalities, etc., to enhance the discussion.
- You will need to decide whether you will allow students to gather extra information about the case study organisation, or whether they are restricted to the information provided. Both approaches have their merits. More advanced classes will generally want to compete by gathering extra information, but you need to ensure that the focus is principally on analysis and problem solving, rather than the endless and inconclusive research which students often engage in. Ensure the rules are purposeful and clear, and that students understand it is the quality of

their thinking, rather than the volume of gathered data that is being tested.

- Case studies come in different lengths. A substantial case (10+ pages) may require several classes, so consider using short cases also. You may like to prepare 2-page cases on current dilemmas, which students can then supplement with their own research. For these research exercises, ensure you use companies which publish comprehensive publicly-available data.
- Ultimately, students can select and create their own cases. Take a vote in class on the most exciting company and give each group a week to present a five minute strategic analysis. This type of competitive presentation can produce good results.
- Be aware of the limitations of the case study method; see Reynolds (1978), Shugan (2006) and Argyris (1980) for useful summaries.

Case studies are valuable in sharpening teaching skills and testing the relevance of course content. I would welcome comments from readers who have experience of using case studies in their Colleges. If readers haven't yet tried the case study method, I encourage them to give it a go.

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