CASE TEACHING

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Overview

Case Method Teaching – “The art of managing uncertainty; a process in which the instructor serves as planner, host, moderator, ‘devil’s-advocate’ fellow-student, and judge, all in search of solutions to real-world problems”

C. Roland Christensen

- Why?
- What? (HBS model)
- How? (HBS model)
- Issues
Case Method: Why?

For the student -- better prep for the real world
• Deeper thinking
• Active listening (open mind)
• Multi-processing (listening and framing)
• Communication skills
• Value of other student’s experience, insights
• Make decisions with incomplete/uncertain data

For the instructor – continued learning/more fun
• New insights for research and writing
• Different class every time
Case Method: What?

The Case

• Typically, a description of a real company situation
  ➢ Usually 8-10 pages plus exhibits
  ➢ Opens with a decision point to create tension & s/u POA
  ➢ Includes company history, industry background, competitive situation, protagonist descriptions, culture hints, competing points of view/alternatives, constraints

• Ideally, the case presents data (not analysis) and requires students to evaluate issues, frame and analyze alternatives, recommend decision and develop action plan

• Generally has an accompanying Teaching Note
  ➢ Synopsis, what courses, where in course, purpose(s), assignment questions, issues, quantitative and qualitative analyses, recommended teaching plan(s), suggested questions, board plan, what happened (TN usually 2x length of case)
The Method (HBS Model)

- Cases may be assigned alone or supplemented readings or mini-lectures
- Case analysis may be purely discussion-based or include writing assignments, presentations
- Case instructor styles range from highly directive to loosely facilitative
Case Method: How? (HBS Model)

Pre-class - *Students*
- Careful individual preparation of case (and supplemental readings), guided by assignment questions (tgt of 2 hrs/case)
- Pre-class discussions in 6-7 person teams (tgt 30 min)

Pre-class - *Instructor*
- Careful preparation of class content and process, drawing on teaching note (*and teaching group if available*)
- Teaching plan includes learning objectives, discussion segments (“pastures”), question plan, board plan, opening, student call list, closing
Case Method: How? (HBS Model)

Instructor’s role in-class

- Guide vs. facilitator; jazz combo leader vs. orchestra director (never really sure where it is going or will end up)
- Respectful, yet sets high standards
- Encourage student-to-student exchanges vs. instructor-student
- Key tools: The Question
  - Dig deeper – “Say a little more about”; What makes it ___?”
  - Compare/contrast -- “Can you characterize the differences?”
  - Transition -- “How is a sales rep likely to react to _______?” or, “How does that relate to the R&D issues?”
  - Clarify -- “So what you mean is ________”
  - Heighten conflict--“Then you disagree with Joe’s analysis of ___”
  - Summarize – “So, when it’s all said and done, you believe _____”
- Use of board (planned in advance)
- Plus where stand, body language, and movement
  - Where address the question (speaker, another student, the ceiling)
Typical 80 min class

- **Opening:** Link to last class/module; framing of discussion (< 3m)
- **Opening cold call:** (“What do you think Ms. X should do? Why?” or, “How would you attack this issue?”) (3-7m)
- **2nd cold call:** “What other approaches might be viable?”
- **Class discussion:** (60m)
  - Could include role play (3-5m)
  - Could include mini-lecture on key analysis (5-10)
- **Instructor wrap:** 1-2 min summary, or 5-7 min mini-lecture
  - Sometimes ask a student to wrap: “What did we learn today?”
- **Set-up for next class/case** (1-2m)

Generally three broad teaching roadmaps
- **Forward:** Analysis → issues → alternatives → decision → POA
- **Backward:** POA → decision → alternatives → issues → analysis
- **Inside out:** High tension issue → analysis → other issues → decision
Case Method: How? (HBS Model)

Institutional attributes

Design Features

• Physical architecture of classroom
• Sections, learning teams, cold calls
• Class size: 95 in 1st yr required courses; 25-100 in electives
• No teaching assistants, but fewer courses/faculty member

Contract - Explicit and implicit ownership

• Student: attendance, prep, participation, disruptions, courtesy
• Instructor: prep, respect, protection/safety, enforce contract

Grading

• Class participation – 50% of grade
• Fixed curve (20% - 70% - 10%)
Case Method: (HBS Model)

Challenges/Issues

• Managing process and substance simultaneously
• Building knowledge about backgrounds/interests of students
• Calling pattern biases (gender, location, experience, language)
• Too much instructor ↔ student discussion
• Too much directiveness (“forced march” -- some topics difficult to teach with cases)
• Creating climate of safety to encourage risk-taking while maintaining high standards
• Letting class culture/process issues linger or fester
• Time consuming for instructor
  • 6-8 hours prep for a new case
  • 1 hr after class to record participation notes and grades
• Letting go and going with the flow (every class different)
Support

• Cases available from Harvard Business School Publishing

• Website: www.hbsp.com
  ⇒ Comprehensive search engine to find cases and build a course

• Register as an “Educator” to get access to Teaching Notes