CASE TEACHING

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Overview

Case Method Teaching – *"The art of managing uncertainty; a process in which the instructgor 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 **<u>decision point</u>** 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*)

Case Method: What?

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: <u>The Question</u>**
  - **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