

Revisiting the Use of Case Studies: Practical Tips and Techniques for Our Classrooms

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Why Use Case Studies?

In 1888, Joseph Mauffett, founder of the College of St. Joseph (Quebec, Canada) stated education's "...goal is not to stuff pupils' heads with facts of doubtful utility that they will likely forget as soon as they come out of college, but rather to instill practical knowledge and, above all, to allow them to grow into the habit of logical and correct reasoning in every subject" (Mauffett-Leenders, Erskin & Leenders, 1997). More recently, others have suggested that education should be concerned with qualities of the mind as well as qualities of the person; that is, curiosity, judgment, and wisdom as well as character, integrity and responsibility are qualities that education should focus on developing within her students (Barnes, Christensen, & Hansen, 1994). While a number of learning activities may accomplish these purposes, the case study method has proven to be extremely effective, especially within the business disciplines.

A variety of reasons provide support for implementing the case study learning strategy. For sake of time and space, this paper will suggest only four. First, people learn better by doing rather than by hearing or seeing. Active participation is one of the most efficient forms of learning. Second, a case study enhances the learning environment. Students will experience and develop several necessary business skills, such as building trust, risk-taking, respect for others, speaking skills, possibly debating skills, self confidence, group interaction, applying analytical techniques, as well as discovering the need for adequate preparation into a professional setting. Third, the case study has the potential for developing critical thinking skills. Over time and opportunity, these critical thinking skills can be learned through observing how others develop and express ideas. That is, a student who has not been previously challenged in critical thinking skills can learn from those students who have more fully developed problem-solving processes. Fourth, cases tend to provide the foundation to move from theoretical concepts to practical application, without depending exclusively on one type of decision making model.

Implementing the Use of Case Studies into the Classroom

General information:

Several issues surface when discussing the implementation of case studies into a course. First, the role of the instructor is vastly different from a traditional lecture or demonstrative approach. In *Education for Judgment: The Artistry of Discussion Leadership*, edited by C. R. Christensen, D. A. Garvin and A Sweet (Harvard Business School, 1991), the point is made that the professor who uses the case study method must simultaneously consider two different classroom phenomena: content of the topic discussed and the process that emerges from the discussion (p.16). Obviously, the discussion must be developed around relevant issues and not stray too far from the

original content and decision context. Of somewhat equal importance is the need for the instructor to assure engagement in the flow of the activities/discussion. This paper is designed to provide a handy reference guide containing tips and techniques for facilitating classroom discussions using a case study. The remainder of this paper will be presented in summary fashion and will provide numerous reference materials.

Preparation:

Know the case material! Know the case material! Know the case material!

Know the students. (you will have to evaluate contributions to the discussion)

Know the students' capabilities (knowledge base, academic background, personal background, etc)

Know the students' experiences working with others and in groups

Know the pace and flow you would like to see developed (but be ready to be flexible)

Have a general sketch of the direction of the discussion (how active do you want to be to assure achievement of overall objectives – through intervening, asking clarification questions, redirecting thinking towards the main point once discussion “drifts”; how should class time be divided; do you use a flip chart or chalkboard to list key points or benchmarks, etc

Know how you wish to open (broad vs narrowly focused question; direct your question to one individual to get discussion started or offer opening question to the class and let any volunteer begin; start with review of fact patterns or just jump right into emotion of issue)

Environment:

Create collaborative effort for working well together

Emphasize the need for “active listening” as well as “constructive” responses –good case study methodology precludes simple “question-and-answer” session

Strive to maintain your complete objectivity – refrain from comments or body language that suggests agreement/disagreement or worse disdain for the comments offered

Classroom Procedure:

Solicit comments and control direction. Instructor should work toward how to solicit and control discussion. Series of questions delivered at various points in time should lead participants into thought. The discussion can be kept moving in a positive direction with the interjection of the next question.

Remember silence is not sinister. It may provide the necessary incubation time for thought. Once participant completes their thought, look at their eyes. Does their look indicate completeness of thought? If not, wait approximately 5 to 10 seconds and recheck. **MANY TIMES THE BEST IDEAS/LINKS ARISE FROM THE NEXT THOUGHT IN TIMES OF SUSTAINED SILENCE.** Be aware! If you are a distinguished lecturer, the first time you encounter this awkward silence, you may be more uncomfortable than your students!!! Five seconds will seem like a minute!

Communicate your expectations to the students. Areas to include are: sufficiently preparing through reading and outside researching (as needed), listening, talking, rules of engagement and evaluation of quality of comments

Evaluation Procedure

Provide them with a copy of how you will evaluate their effective participation. One such tool would be to scale the quality of each participant's response.

| <u>Points</u> | <u>Contribution Attributes</u> |
|----------------------|--|
| FIVE | Theoretical insight highly applicable to this case and generalizable to other situations |
| FOUR | Well developed argument supporting key insight into this case |
| THREE | A reasonable developed argument supporting key insight |
| TWO | An interpretation of data that was not fully developed |
| ONE | Statement of relevant fact not previously addressed |
| ZERO | No participation |
| MINUS ONE | Repeating statements or misdirecting class with irrelevant topic |

Getting Started/Maintaining Flow/Facilitating Discussions

The art of asking good questions is the key to quality discussions. Keep pet phrases readily available that spur discussion. For example:

For general discussion:

- Who will start us off today?
- What are the relevant facts? (who what where when how)
- Can someone tell me what was going on with this situation?
- What is the primary issue here?

For clarification/emphasis purposes:

- Can someone restate what _____ just said?
- Are you contending that _____ (restate what was said)
- Is there another side of this issue that needs further development?
- Is this statement universal (applying to most any other situation?)
- What might happen next?
- How might you handle that situation?
- What else comes to mind?
- Keep going...then what?

For drawing out support for comments:

Could you explain why you see it that way?
Can you think of anything we left out?
What evidence might support that statement?
Why do you think that is important?
Might it apply in some other related situation?
That appears to be direct conflict with a prior point – can both be true? If so, how?
If not, why not?

For summary:

What inferences can we draw from this?
What generalizations can you make?
What are the three most significant items we have addressed so far?
What comments made added validity to your personal thoughts?
What comments impacted your perspective on this situation?

Six Common Errors as Facilitator

- “Hide and Seek” – the instructor has a preferred answer and series of responses based on what is asked. Students quickly catch on that they are to “guess” what the instructor is thinking, rather than developing student thought.
- “You’re OK and You’re OK too – the instructor provides approval of every comment, suggesting to students that each is intelligent, well thought out and of equal significance toward the decision making process. Soon students will tune out since no one idea or direction is any more value than any other idea.
- “20 Questions” – similar to “Hide and Seek” except that the line of questions appears to be “fill-in-the-blank” so we can forge ahead, rather than seek creative insight from students.
- “Rapid Fire” – not providing sufficient “down-time” for ideas to incubate. The instructor fires out question after question.
- “Quick High Five” – the first correct “answer” is verbally acknowledged; it terminates further development of thought, variations on the theme and the class will begin to look to that same individual to be dubbed the class “problem solver”.
- “Nonspecific Nonsense” – using either low level questions about facts or understanding, such as “are there any questions now?”, or “Does everyone understand or see?”

How to deal with Case Study “Problem Children”

One issue that always seems to surface with regards to case studies is how to handle a student who exemplifies behaviors that are detrimental to the class learning objectives. Obviously each situation and student is different and must be handled appropriately. While a “one size fits all” rarely works, there are a variety of techniques that have been employed to minimize the negative impact of a student. Presented below are some of the negative behavioral attributes and the expected outcomes without intervention, as well as some prescribed interventions.

Poor Behavior Attribute (Outcome)

*** “Silent Stan” – quiet, shy (Lack of participation)**

Interventions:

- Involve through direct questioning
- Make direct eye contact
- Offer positive reinforcement with first contribution
- Begin class exercise with a specific question to which each person is to write a response, then ask this individual to read what they wrote

*** “Sneaky Pete” – side conversations (Distracts others)**

Interventions:

- Make eye contact with them
- Move toward them during discussion
- Ask if they will share their ideas with the class
- Ask their opinion on last comment
- Ask someone very near them to participate so the new comments are near them
- Stop! Wait them out; visit afterwards

*** “Running Faucet” Randy– rambling on and on and on (Wanders off topic)**

Interventions:

- Ask them to summarize their main idea in one sentence
- Give limited time to express idea, then move on without comment or expression
- Say “Interesting perspective, what do some of you think about that?”
- Suggest it is so interesting that you would like to hear more outside of class

*** “Soap Box” Sam (“Know-it-all”)**

Interventions:

- Acknowledge comments
- Give limited time to express idea, then move on
- Call on sparingly, then explain why after class individually
- Seek them out during breaks and give individual attention (beware – stalker mentality may set in)

* **“Heckler Hal” (Verbal attacks on other persons)**

Interventions:

- Remind class in general that many discussions will involve differences of opinion ; respect is a necessary ingredient
- Move physically toward the main perpetrator
- Call aside after class; reprimand directly

* **“Bellyaching Billy”- Overt Hostility/Belligerent (Usually prejudicial/judgmental nature)**

Interventions:

- If using phrasing that is condescending or crude, rephrase generally in softer terms and ask if that is what was meant
- Move closer physically, maintain eye contact
- Ask if others feel as strongly on the issue
- Any openly blatant, blurted out attack on another class member’s ideas results in dismissal from the classroom and an appointment to see me for reentry into the class must occur prior to next class meeting

* **“Big Head Benny” (Caught up only their agenda/ideas; “Majoring in Minors”)**

Interventions:

- State they are entitled to their opinion, but we will move on now
- Ask them to restate their point in the form of a question
- If the topics are interesting, but unrelated, say if time allows, we may wish to pursue that avenue of thought

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