

TEACHING WITH CASES

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Abstract

This paper contains a brief history of the case study method, provides a rationale for teaching with cases, tells how to access cases, describes types of cases, lists various methods one can use in teaching with cases, discusses case solutions, gives information about publishing cases, and closes with a note about workshops on writing and teaching cases.

Teaching with cases may add an exciting new dimension to the teaching of business courses. Many faculty and students warm to the opportunity to examine real-life problems in all their complexity and uncertainty. Faculty and students learn to bring all their knowledge, skills, and experience, not just from the business disciplines, but from all areas of knowledge, to the problems posed in cases. Students studying cases may imitate in a realistic way the work they will be doing when they get into their careers in business.

A Brief History

Cases have been used for as long as there have been teachers. Teachers from time immemorial and in all areas of learning have posed problems for students to solve. The modern use of formal cases had part of its beginning with the Harvard Law School early in the 20th century. This methodology was soon picked up by other colleges including the Harvard Business School, which popularized the method for business education. Later other schools, such as Thunderbird and Ivey, began to use the method as their principal teaching methodology. Now hundreds of business schools use cases on a regular basis.

Rationale for the Case Study Method

The case study method is a robust technique for teaching business courses. The study of cases gives students an opportunity to study real-life problems in their historical context and allows students to see how problems unfold in the practice of business. Most cases are multidisciplinary and complex, just as management problems are in real life. Cases can be found for all the functional areas of business.

Good cases allow the student to look over the shoulders of managers as they identify the problem(s) that need to be solved and allow the student to follow the manager's thought processes that as the manager considers the various approaches that may be available to solve the problem(s). For many cases there is no clear right or wrong answer; this gives students a taste of real-life decision making.

Whatever the topic, cases can be used to illustrate the relationships between and among business theory, research, and practice. Added to the professor's presentation of theory and stories from the professor's experience, and added to the students' experiences, cases can significantly enrich the learning experience for students.

Choosing and Acquiring Cases

Cases may be chosen for a large variety of reasons. Some may be chosen to illustrate the history of a particular company [TCS, an Entrepreneurial Air-Express Company in Pakistan; Harvard Business School (HBS) 9-803-027], industry, or country. Some are designed to acquaint the student with a particular company, industry, or a country's economic situation [Chile, the Latin American Tiger?; Harvard Business School 9-798-092]. The focus of other cases is on particular business functions [Proctor and Gamble: Global Business Services; HBS 9-404-124]. Cases are available to illustrate various approaches to strategic planning [Silvio Napoli at Schindler Italy (A); HBS 9-303-086 or Judo in Action; HBS 9-703-454]. Some illustrate international management [Blue Ridge Spain; Ivey 902M03], and some demonstrate the influence of government policy or economic theory on business practice [Russia, the End of a Time of Troubles?; HBS 9-701-076]. Others illustrate the problems of government-controlled companies [Strategy of the Firm Under Regulatory Review: The Case of Chilectra; HBS 5-702-058], and still others illustrate problems of Corporate Social Responsibility [The Chad-Cameroon Petroleum Development and Pipeline Project (A); HBS 9-202-010].

Cases are available about profit and not-for-profit ["Saving Money, Saving Lives;" Harvard Business Review R00612] companies. There are cases involving government and civilian entities [Education in Chile: A Venue for Individual, Business, and Community Involvement; HBS 9-303-078]. There are cases for very large [Ford Argentina: Transforming a Global Industry in a Local Market; HBS 9-803-093], medium-size, and small companies. There are cases for stock companies, closely held companies,

and entrepreneurial start-ups [Precise Software; HBS 9-204-157]. There are some companies for which there are multiple cases [Wal-Mart] and competitive situations which are covered in depth over time and in multiple settings, such as the Cola Wars series. Finally, there are typically many cases for each developed and many developing countries of the world; several of these may be chosen for a course studying a particular country. Actually, most good cases can be used for many different courses in business.

Many current cases are available, that is, cases written within the past 12 months covering events of the past two years. On the other hand, classic cases are available, ones that get used extensively year after year. Two of this latter type are the cases [EuroDisneyland; Thunderbird A07-99-0007 and Lincoln Electric: Venturing Abroad; HBS 9-398-095].

Many current textbooks come with cases. For some business disciplines there are books devoted entirely to cases. Cases can be ordered directly from case repositories, such as those at Harvard Business School, Thunderbird, Ivey, and Stanford. The Harvard Business Review regularly prints cases. Some cases have ancillary materials, such as videos showing interviews with principal figures in the cases.

Professors may register with Harvard Business School (HBS) and gain access to examination copies of many cases without charge. Typically the professor will need to have a letter sent from his or her dean to HBS attesting to the professor's employment status. HBS will then allow the professor to access copies under password control.

Cases may be made available to students in hard-copy form or online. For the online option, the university can set up an account with the repository to allow the student to access directly from the repository particular cases under password control.

Harvard Business School provides a good search engine on the web. Professors using that engine can enter many selection criteria to help find a desirable case from the thousands that are available.

Teaching with Cases

Cases can be used in many ways for classroom instruction. Professors may lecture the case. Students may be asked to present the cases, either individually or in teams. Students may be asked to study cases and the professor or a student can lead a discussion of the case.

Students may be asked to study a case and write up a solution to the case for the professor to evaluate. Another approach is for the student to study a case and respond to a list of questions the professor has posed. Students may role play or debate the issues involved.

Note that many of these methods may be used in online instruction.

The Case Solution

Many cases come with a case solution. This is normally a separate document available only to the professor which gives additional information about the case, gives the author's solution and rationale for that solution, and may describe what the company actually did after the date of the case.

Many case solutions also suggest the courses in which the case may be used. Many will provide guidance to the professor about teaching the case. Sometimes the author will suggest the amount of time that might be spent on the various aspects of the case. For some cases the author will suggest various foci for teaching the case depending on the functional course in which the case is to be used.

Publishing Cases

Many business departments will allow a published business case to be counted as a publication to meet publishing requirements for tenure and promotion, depending, typically, on the publishing location. Cases that are published in refereed journals are most likely to be so counted.

Some business schools, such as Harvard Business School, will publish only cases written by their own professors. However, in many cases the publishing arm of the repository will sell and distribute cases written for another university, provided the publication is under the name and auspices of the other university.

The Case Research Journal is a refereed journal which considers cases of all business types. This journal is currently hosted at Miami University of Oxford, Ohio.

While cases of all types can be found, there are a small number of cases written for not-for-profit and small companies. There are almost no published cases that are explicitly Christian faith-based or that are written explicitly from a Christian world view.

Workshops on Case Teaching

Professors interested in learning more about cases may want to take advantage of workshops devoted to case writing or teaching. Harvard, Ivey, Babson, and Miami University provide such workshops. Workshops typically run two to five days. Some workshops are in high demand and are sold out, so early registration is required. Information about these workshops may be found on business school web sites.

PROPOSAL FOR CASE REPOSITORY

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ABSTRACT. It is proposed that the CBFA sponsor the development and operation of a repository for business cases that are specially related to Christian values and ethics. One university should be appointed to manage the repository. At the October 2004 meeting a planning committee should be appointed to develop plans for the repository, with a report due back at the October 2005 meeting, at which time the repository plan would be approved and a university appointed.

NEED. Many CBFA faculty use the case study method as a principal methodology in their teaching. Anecdotal information obtained from many of our colleagues indicates that most cases available from the national depositories, such as Harvard Business School and IVEY, are not written from the perspective of a Christian world view. While there are many cases dealing with business ethics, many of the ethics-focused cases do not rise from Christian ethics.

Further, there appears to be difficulty in getting the nationally known depositories to accept cases based on a Christian world view. There is evidence that some of our colleagues would write such cases if they had some assurance that the cases would be considered.

CBFA SPONSORSHIP. To help resolve this problem, it is proposed that the CBFA take on the project of establishing a repository for high quality business cases that are written explicitly from the perspective of a Christian world view. The repository might be managed by one university, while policies for the repository might be developed and managed by an oversight committee consisting of professors who are appointed/elected by the CBFA.

Cases would be accepted by a peer review process. Papers accepted through the peer review process would then be added to a list of endorsed cases. It is hoped that cases would come from all business disciplines.

UNIVERSITY MANAGEMENT. It is proposed that a business department/school from one university would be selected to manage the repository, disseminate copies, probably both in hard copy and on line, at reasonable cost as determined by the oversight committee. At least one university has volunteered to be the manager of this project.

ACTION AND TIMING. It is recommended that the CBFA adopt this project at its October 2004 meeting and appoint a project planning committee. In addition to developing policies to recommend to the CBFA, the planning committee would identify universities which would be willing to manage the repository.

It is further recommended that the planning committee be charged to come back to the October 2005 meeting with any necessary recommendations for CBFA to activate the repository.