



A Guide for Effective Case Analysis

Yezdi H. Godiwalla

Professor, Management Department, College of Business and Economics, University of Wisconsin-Whitewater, 800 W. Main Street, Wisconsin 53190-1790, USA.

ABSTRACT

The article provides a review of case method and the purposes it serves. The pedagogical process of the case approach is also an important aspect, raising such important questions as: In which ways does the case approach benefit the educational experience in a more lasting ways? Why does the case approach from the traditional lecture approach? What is the student involvement in the case approach and its consequent benefit to the critical and creative thing of the student? What are the benefits of decision making of the student when he is cornered in a decision situation? Is it as important to know the right questions to ask as the right answers to arrive? If the case approach is to be really meaningful, why and how important is it for a student to know how to prepare a case before his class session? How does the case method usually keep the students more attentive to the classroom activities than the traditional lecture method? These questions are raised and answered in the article. Case method form of teaching requires, like any other activity, its own specific case method teaching experience and skills. It is a unique blend of the instructor's personality and teaching style, the case content, presentation and narrative style, the class' unique personality, and the unique chemistry between the particular instructor and the particular class.

KEYWORDS: Case Method of Instruction; Business Cases Preparation.

Introduction

Case method has been the practice in selected courses in many business schools. For some courses, e.g. strategy courses, the case method usage has abounded in its usage. The focus has been on the classroom discussion and analysis. The purpose is to make students think in the simulated organizational situations and then make well informed and well thought out decisions. One knows well that no sound decision by itself can carry the day: it must be backed by sound and effective implementation. In surgery, it is not only good surgery that is important, but also the post-surgery care.

Case approach to education raises the awareness of the class students to be more critical and creative. They are exposed to diverse viewpoints, that is, to understand and evaluate the viability of views not considered before, and, they are pushed to be creative, that is, they are jettisoned off the cliff to come up with newer solutions and paths of dealing with the case problems.

Issues in the Case Method

One may ask: What is a Case? A case is a rendition of a perceived, short-story-like narrative of (factual or otherwise) events captured as a snapshot of a period of time for an organization and its peoples, as seen from the case writer's eyes. He or she, that is, the case writer, ("he" henceforth expressly means either, "he" or "she) presents a limited portion of the organization's information, data and perspectives, as the case writer extracts the information for presenting his case to the readers.

He usually has an agenda, a preferred priority system or values, or a set of issues, which he wants to bring attention, or, even sublimely, promote to the reader. He presents a very limited set of information. That is to say; he does not, and because cannot, present all the circumstances surrounding the organization. Although a case writer has a priority system in his mind and heart, he is expected to keep it to himself. It is usually not indicative of effective or ineffective handling of administrative problems or situations, but usually it is a basis for classroom discussions. Often implicit in the case are

the case writer's a-priori assumptions of his views about how the organizational situation might be handled. The writing style of the case may reveal some of these assumptions and biases. One may have to read in-between the lines, so to speak. If the writing style does not show a clear bias, the data and financial and other quantitative information, as he presents them in the form of tables and other exhibits, might often reveal the case writer's probable perspectives. One can read from what he presents. Also: What is not there might be more telling than what is.

The case method, using the case analysis in the form of case discussions in the classroom, is used for the purpose of educating students about one or more theories or concepts in one or more inter-related disciplines, such as supply chain/operations management, marketing, finance, or human resources. Student learning outcomes are achieved by analysis and discussion, a method that builds an approach of "thinking like a person specializing in the discipline". It is stated in Harvard's business texts and technical notes that if we can make medical students think like good performing doctors then we have made significant headway as medical school educator. Similarly, we should try to make business students think like effective business managers.

On the history of the case method of instruction, the case method of instruction had its earlier beginnings in the education of professional disciplines, e.g., from medicine That is to say, the use of each patient's chart at a time, as "a case", for teaching the medical students and residents at Harvard Medical School; to law, from 1878 onwards, at Harvard Law School; and, then to business administration in the form of a short-story-like narrative of a snapshot of an organization's situation, from 1908 onwards at Harvard Business School. The high level of acceptance level and viability of the case method at Harvard Business School then initially led other business schools in the country and only a few other business schools outside the US (e.g., Western Ontario University) to partially or mainly use the case method in a few courses, particularly in courses such as business policy (now called strategic management), marketing, and human resources. In this model, a course would have a significant amount of concepts or theory, and then a few cases on each section of theory would follow as illustrations of the theory in action.

Besides Harvard Business School as an extensive and significant user of the case method of instruction, other business schools followed such a suit. Western Ontario University's business school is also a case method school. In 1961 when Indian Institute of Management-Ahmedabad was founded in collaboration with Harvard Business School, it started its graduated programs with the extensive and almost exclusive use of the case method of instruction. It first started to use mostly Harvard cases in the setting of the US business environment, until it later on built up a larger repository of its own cases in the setting of the Indian business environment.

Table 1

Format of Classroom Presentation and Report Writing Outline for Management Cases

1. Define and describe the major problems, (present and potential), opportunities and other issues facing the organization.
2. What are the organization's vision, mission, long term objectives, shorter term goals, and, (actual/practiced) corporate strategy, and sale revenues and other quantitative performances?
3. What are the organization's basic financial profiles and financial characteristics (if such data is available)? What are the financial and performance ratios and percentages?
4. Internal analysis: SWOT analysis (strengths-weakness; opportunity-threats analysis). Describe and evaluate the general organizational climate; organizational philosophy and history, top and middle management leadership, supervisory styles; organization human resource management policy, work design and motivation, and communication issues.
5. Competitive analysis of the organization in the context of its industry, including that of Michael Porter's "Five Forces" and "Value Chain" models.
6. The "Key Success Factors" for the industry? Review the details of the more critical Key Success Factors and discuss the accomplishment of these more critical Key Success Factors.
7. Does the company meet or exceed the Key Success factors? Does it meet or exceed the expectations of the organization's stakeholders? How does the organization perform compared to its industry norms on various performance and other financial ratios? How does the organization perform compared to the direct competitors?
8. List and briefly explain the relevant and more important concepts of the course as they directly apply to the case. Evaluate the company's performance in this context.

9. Evaluate the performance of the organization's corporate strategy in the context of its vision, mission, objectives and goals? What are the ways by which you would change the corporate strategy, and, formulate the future corporate strategy for the future states of organizational strategic external environments when the essential strategic rationale would probably change? The following questions are relevant for the current pursued corporate strategy:
 - a) How well did the organization achieve its objectives? In reality, what are the processes that the organizational corporate strategy places an undue strain on the organization's capabilities and resources?
 - b) Does the corporate strategy exploit the viable and desirable opportunities from the external environment, such as newer customer preferences, newer geographical regions opening up for the organization's products and services? Does the corporate strategy effectively utilize the organizational distinctive strengths and distinctive core competence to gain a competitive advantage in terms that generate meaningful market share gains?
 - c) Does it deal or contain with the threats and risks?
 - d) What changes should be included in the future corporate strategy to deal with the future organizational strategic environments?
 - e) What should be the internal changes that should be made?
 - f) What are your action-oriented recommendations? They should reflect the reality of the company's situation. Provide some rationale for each recommendation. Provide reasons why you did not consider some of the other possible recommendations that could have been utilized but that which may have some undecided directions or undesirable consequences.
10. Given the problems of the organization, what are some of the challenges that the implementation of proposed, new or modified corporate strategy would face? How would you implement your action-oriented recommendations? What are the unfavorable consequences of the new corporate strategy and how can you contain them?
11. State each of your many focused, action-oriented, specific and recommendations as, in the following format:
 - a. State the action-oriented, specific recommendation itself,
 - b. State the justification, relevance, rationale of the recommendation,
 - c. State the plan of action as to how you would implement the recommendation

The case method in classroom discussions allows students to see more perspectives and learn to think in the subject matter through analysis of a specific business situation. This leads students to analyze and solve problems in the discipline, build their own models of thinking about theory, and better internalize these theories. A case, instead of telling the student about the effective method of handling the problems, mainly provides a starting point for discussions. The Instructor directs the discussions so that he may be sure that the major issues are adequately addressed during the class period. Students do have a wider exposure to a variety of issues and viewpoints on a specific topic and concept, as they debate many cases within a discipline over the weeks of a semester.

The case method is designed to first make a student think analytically and logically (and, later on in his experience of the usage of the case method, often even intuitively) in almost a structured and systematic manner, using a scientific and rational analysis and using the evidence rather than solely relying on his personal opinions and biases. After analysis, he can provide his recommendations, based on correctly deduced and inferred data, facts and information. His conclusions should reflect a strong logical foundation or base upon which he depends for his course of recommendations and actions for the organization. Once he is more skilled through much practice, he often uses a type of thinking that blends the factually based inferences with his opinions and preferences. His thinking then fuses with his feelings. The process also requires a willingness and capability to discuss with supporting reasons and analysis and see other's perspectives and to disagree and agree. The ability to convince often depends not only on rational arguments and support of facts in some systematic manner, but also on the effective manner way the discussant presents his opinions and arguments. Upon his graduation and in real practicing life, his skilled and convincing capability would stand him in good stead. His leadership skills as a practicing executive will to a great measure depend on that.

Case analysis requires analytical thinking. This paper suggests ideas that can facilitate the process of case analysis, preparation, presentation, discussion and report writing by using a framework, worksheet and format. A proper construct or framework for analysis is important because it takes into consideration all major dimensions and considerations. If the reader of a case can re-format the content of the case in an appropriate framework, it will be easier for the case reader to analytically comprehend a large amount of input from the case narrative, including such items as: quantitative data, qualitative information, background information, anecdotal episodes, and also multiple opinions of characters in a case.

Categorizing the inputs of a case into an appropriate framework or format forms an analytical framework. Such a framework enables the reader to at-a-glance develop a comprehensive perspective of the total case situation. The framework also enables the reader to develop a more rational understanding of the overall case as well as the constituent issues of the case. Table 1 presents a format for case presentation. This template ensures that the students develop a clear and well organized approach to present the case in the classroom or submit a written case report

The Purpose of the Article

The purpose of this article is to discuss the nature of the case method and to present a discussion of issues pertaining to the case method, including discussions on the relative benefits of the case method and the traditional lecture method, and, the ways by which students can effectively prepare for cases. Such approaches can help students to be more systematic and organized in their preparation and presentation of cases. With the help of these approaches, students are more likely to skillfully analyze the organizational situation and present his inferences, conclusions and recommendations for actions with clear justification and support of the case's factual information.

Literature Review and Discussions

The use of cases as a sole method of instruction can be challenging and it should be well regarded as a major approach for education of students. Experience in the case method engenders a well-rounded and talented case method instructor. It is often a dynamic and self-adjusting blend of art and science. Often there are no finite ways to handle a specific case method situation in the classroom. It is a skill. There is no substitute for a careful blend of intense and long practice, and, a rational study of the methods of different instructional approaches of case method. There are a different path ways which a case method instructor may consider, depending upon his feeling of what is going to most effective in a given, specific classroom case discussion situation. Such issues for his consideration may draw to his attention such thoughts as: effective case method is a blend art and science and it is the culmination of intense practice, effective case discussions require continuous and intense student engagement, effective case method requires the skilled and deft use of the case instructor's subtle and often not so subtle steering of the direction of the case discussion at different discussion junctions, and he should push students to make good choices in the case decision points, have the provide more support and rational analysis, and provide more action-oriented solutions and show how they would, if they were in the case situation, implement their decisions.

Greenhalgh (2007) argues in favor of following approaches regarding both, the scientific and artistic nature. First, in a scientific view, a case is a neutral description of real life business problems and situations, and it is subject to rigorous rational analysis and scrutiny based upon the strict presentation of scientific evidence. Second, in an artistic method of viewing cases, because cases are incomplete and often very open-ended natural narratives, "the dormant literary perspective" states that cases are subject to diverse discussions leading to interpretations and multiple and often conflicting inferences, conclusions, and recommendations for actions. In the second artistic method, students' managerial problem-solving skills would further their decision making skills and heighten their leadership potential by developing critical thinking and creativity. Thus, both science and art aspects are important in analyzing cases.

Similar arguments were discussed in the joint seminar of the veteran case method instructors of Harvard Business School and Indian Institute of Management-Ahmedabad that took place at the Case Centre of the Institute (IIM-A) on October 17, 18, 2014 (BS Reporter, 2014). At the seminar, the participants concluded that the case method is a powerful method of learning in the management field. However, it is challenging for the faculty to master this approach to teaching. In the seminar, they concluded that the instructor, instead of sharing his knowledge, has to hold back and be a moderator of students' discussions. He has to skillfully and quite unobtrusively direct the path of discussions elsewhere in order to cover more important issues.

The case method should emphasize, as espoused by Harvard Business School, the "functional approach", i.e., the function or part that each organizational factor or characteristic plays in the total scenario of the case. Thus, the case setting is the sum total of the events leading to the current organizational situation. Case discussions are thus less about finding the specific persons or decisions, and, more about reviewing the sum total of the overall aspects of the organization and its interactions with its strategic and operating environments. Therefore, case discussions may pursue the approach of the "interrelationships of human beings and the complex connectedness of all organizational components, functions, and processes" (Merseeth, 1991).

Effective case method would rely on the continuous student engagement. This is because continuous and intense student engagement in case discussions would enable students to "learn to identify actual problems, to recognize the key players and their agendas, and to become aware of those aspects of the situation that contribute to the problem" (Welyt 1989). Further, the students must always be mindful that the simulated conditions of case situations have a bridge with reality. That is, the case narrative is based on a real life story. Kachra and Schnietz (2008) also argue that better cases in strategic management would provide for a fuller range of issues for discussion that would lend verisimilitude and also a better understanding of the interrelatedness of events and factors which, in turn, needs proper integration.

At a Harvard Business School colloquium on the case method, the veteran case method instructors argued that it is only when students fully discuss and really get themselves involved in the cases that they learn better and that their education is more enduring (Jacobson, 1984). Student engagement and involvement are the keys to a more satisfying case discussion. Only then that one feels that we have thoroughly discussed all important facets of the case. The instructors of the Harvard colloquium pointed out the difference between the straight lecture method and the case discussion method. In the case discussion method, the focus is on the, “real problems (that) make it beneficial to learning”, in ways generally denied in the lecture method.

Between the two: (a) the traditional lecture using the textbook chapters as a basis for the lectures, and, (b) the textbook lecture method plus case method, the latter method, that uses both the methods, is better. This conclusion is supported in a study by Stewart and Dougherty (1993) of two groups using the aforementioned two different methods. The researchers state that the group using the latter (i.e., the lecture plus case) method performed significantly better in a cost accounting exam than the group using only the lecture method. When used in addition to a brief presentation of salient points of theory in the lecture method, the case method may yet yield enhanced results of student learning outcomes.

Active and intense class participation and really active student engagement and involvement the students are vital to the effectiveness of the case method of instruction. It is the very corner stone and foundation of case method of instruction. Continuous and intense student engagement and involvement are pivotal to the effective case method and student learning outcomes (Reynolds, 2015). Regarding the importance of continuous student involvement, Aylesworth (2008), pursues another and quite allied line of argument. He makes a point of case discussion that the “improvisational comedy emphasizes collaboration over competition.” Because a good portion of the course grade is allotted to class participation, students feel that they have to argue for the sake of attaining a high level of class participation. They not only argue for argument’s sake, but they also want to aggressively attack their fellow students, hoping to impress the instructor. In such instances, the case method elicits from the participating students a strong and compelling competitive fever in class; while the method advocated by Aylesworth, (2008), on his topic of “improvisational comedy”, states that it often “leads to creative ideas and solutions to problems”. Aylesworth (2008) claims that his method, when properly used, would improve the mind-set and perspectives of the students. Thus, the case method can be used in conjunction with other offshoot methods such as the “improvisational comedy” method, as Aylesworth (2008) suggests as a good way to educate students.

There are additional issues and methods that might achieve similar results when one reviews the case method. One such method is an interesting method called, “the interrupted case method” that was show-cased at the Case Study Workshop at the National Center for Case Study Teaching in Science at the University of Buffalo in New York. Schiller (2004), from the experience of this workshop, reports the method in which the instructor follows a “progressive-disclosure format” and he gives to the students the case details or data in “a piecemeal fashion to work on in groups”. This proceeds in a stage-by-stage process, generating anticipation on the part of the participants.

Another worthwhile instructional method for building upon the advantages of the case method is to first have the students warm up on the basic facts of the case in small groups, preferably under some guidance of discussion topics, and then re-group in class as a whole to discuss the case. The author of this paper has used this approach, and, he has found this method more useful with undergraduate students when they are neither fully prepared nor warmed up to discuss with full vigor from the start of the class session.

The case method may be regarded as an exercise in simulation, often with an indirect, non-personal involvement by the students even though the Instructor may ask such questions as: “What would you do if you were the CEO, or a marketing manager or an HR manager?” The psychological distance of the student from the decision making problem of the company detracts from the more intense involvement that a richer contextual method may achieve. The case method, it is felt, does not make him feel personally liable or responsible for the consequences of his proposed analysis and decisions. Simulated accountability can do some, but only do that much.

On the other hand, experiential learning improves student internalization of the company’s situational details and the concerns through a more direct and very personal involvement with the case problem at hand (McCarthy and McCarthy 2006). In the case method, some people argue, students do not feel personally accountable for their decisions, as they may make sweeping recommendations without realizing the cost or the challenges of its implementation. On the other hand, experiential learning does indeed make students very personally involved. Thus, when the student feels more responsible because he is involved in a “direct personal encounter with the phenomena being investigated,” he learns more fully. Experiential learning, when used in conjunction with other methods, has the capability to make for more involved encounters.

There is a constant concern that we, as instructors, may be either over directing the flow of student discussions or that we are not providing enough direction so that students really learn from our scholarship and experience. This concern is a real one. We become self-conscious about this issue in many class sessions when we analyze cases. Several case method scholars have addressed this issue of the appropriate degree of instructor direction, participation, and

involvement in the case method. Kenneth Andrews of Harvard describes the intervening gray area that the instructor must struggle with as he tries to conduct a class case discussion (Andrews 1954, p.98). In this situation, he (the Instructor) “exercises control over an essentially ‘undirected’ activity, but at the same time.....keeps out of the way, lest he prevent the class from making discoveries new also to him.....” Also, Merseth (1991) argues that an instructor must manage the content of the case discussion, and, also the process of case discussion. The students focus on the content of the case, and the instructor focuses on both the process of case discussion and the content of the case.

Cases have other similar variants that serve essentially the same purpose, that is, they provide a story of events with a specific set of details, usually from real life. Cases serve a good purpose for the student and they become a basis for classroom discussions and analysis. They are not so much didactic as they are a basis for evaluating different forms of actions and parameters for decision making. In this context, Paget (1988) cites other vehicles for classroom discussions such as: digest, critical incidents, and condensed cases, but without the supporting data, diagrams in the form of organizational charts, and tables such as financial or accounting statements. Other case authors, researchers and scholars use terms such as vignettes, anecdotes, incidents (Wagner and Sayles, 1972), incident processes (Pigors and Pigors 1961), text problems (Davis 1960), entrepreneurial (Henry and Foss, 2015), small and medium size enterprises (Rittenhofer, 2015), and living cases (Towle and Dauten 1957). Further, illustration capsules, as a term in some texts, including in the widely used text by Thompson, Peteraf, Gamble and Strickland (2016), has been used to imply that a major concept in a theory of a chapter is illustrated in a short, page-long case.

Grandon (2014) posits an argument that the case method used in isolation, without any attempt by the instructor to relate to other important issues, can be a limiting factor. He proposes that the instructor should expand his role, and, in so doing, he then “uses complexity as a means of better understanding the role that case studies can play in the classroom and in building bridges between research and practice. His viewpoint is that a “narrow view of the impact of case studies severely limits their widespread adoption. Rather than treating a case study as a document of very limited value to an academic career, the author needs to recognize their role in building relationships between research and practice. Through these relationships, opportunities for students and two-way flows of knowledge between academia and practice can be achieved.” By injecting the complexity issue in his case discussions in the classroom, he in fact would ensure that the “objectively “right” or “best” answer is unlikely to be realized. It is less clear that it is applicable to situations where optimal procedures are available and can be taught or learned.” In this way, the benefits that would accrue by such an approach would enlarge the scope of understanding and relating the issues in the case to the larger issues. This would engender the building of bridges between research and practice. The use of analytical approaches and frameworks, both during the student preparation and presentation and/or discussion of cases, would likely further the connection between research and practice” (Grandon, 2014).

In the studies of Egleston, (2013) points out that in the case method students improve their insights and analytical skills and develop in-depth technical knowledge in a given specialty or topic, and, further, they also acquire the ability to think in the subject as if they were practicing executives and in this way, they inculcate the “expertise in a variety of fields as they learn rules of thumb for decision making” (Egleston, 2014). This is a significant benefit not often wrought through the traditional lecture method. He does point out to some of the limitations, such as the students have to contend with the large amount of data and information. This makes them look for the important from the important, a good thing in itself. However, it does not make the students aware of the search process that they would have to pursue in real life in which no one presents the important and the unimportant data on a platter. They have to decide which type of data they should look for and which type of data is not needed. That skill is wrought through experience in real life organizational setting. Egleston (2013) expresses his views on this issue well: “Case studies typically present a student with a large amount of information and a set of questions designed to assess whether the student can glean the answers from the pages of the case. Although a case may well present a vast amount of data, it is still finite and available. The answers are there if only the student continues to dig. Students do not learn to ask appropriate questions; they learn to answer those asked by others. Students do not learn where to go to find answers to questions; they learn that the answers are in front of them. Such an experience does not prepare students to address the problems they will face upon acquiring positions in management.”

Thus, one may be tempted to conclude that the case method all by itself may not be enough. It may be supplemented by short lectures and instructor’s views and cautions and suggestions in the right places during a class session. A-priori study of the relevant concepts would further the students’ meaningful grasp of the implicit case issues, such as the concept that if the top management is in disarray and conflict, the middle and lower levels would not perform well because of feelings of insecurity and diffidence. So, when they prepare for their case, they are aware of the underlying concept that would play in the case. This may be viewed as “giving the hand away”; however, if effective student learning outcomes are the over-riding objectives, one might err in favor of accomplishing students’ learning and perspicacity rather than the students passing by a concept so significant and hoping that their less sensitive and less exposed minds would perchance notice and inculcate the important concepts or idea.

GUIDELINES FOR CASE PREPARATION AND CLASSROOM DISCUSSIONS

The Objectives of Case Preparation and Analysis

The objectives of proper case preparation and analysis may be delineated here:

- a) To develop critical and analytical skills to diagnose organizational problems, situations, issues and values, and, then to develop problem solving and decision-making skills.
- b) To better understand the generalized approaches that are likely to be more effective in different types of organizational settings, internal and external, e.g., emerging versus mature industries, highly competitive markets.
- c) To improve insights of what executives should and should not do in a variety of organizational situations for improving organizational performance.
- d) To better understand the characteristics of major types of organization's internal and external environments, and, developing a contingency approach to strategy formulation and implementation.
- e) To improve judgment through practice to conceive alternative solutions, diverse perspectives, overall or big picture, viable practices and solutions.
- f) To improve one's sense of business and organizational judgments through one's own intuition and intelligence, and, relying less and less on external sources, e.g., professor, fellow students, case notes, textbook.
- g) To become increasingly contemporary in industry-specific, and, world's regional specific knowledge and intelligence so as to become more business savvy and self confident.
- h) To improve the ability of discussing with others, including building skills of: listening, understanding newer thoughts and their implications, persuasion, and generating original arguments, viewpoints and solutions.

The Method of Preparing for Class Discussion

- a) Review the case quickly. Grasp the big picture. Get the major thrusts. Get the flavor.
- b) Then read it critically not like reading a short story) for identifying important information in order to build a complete well founded picture about the particular organizational situation. This involves reviewing the narrative parts and the exhibits in a comprehensive manner.
- c) Sort the important from the unimportant: Decide what is important or critical here and how does that affect the big picture.
- d) Determine which conceptual and analytical tools are relevant, and, which are of paramount importance to the particular case situation. This should help sharpen one's skill to correctly answer the question, "Given the situation, what should you do? And why?"
- e) Determine with clarity what the overall situation is by "cleaning out" conflicting information, issues, viewpoints and data in the exhibits.
- f) Determine your own diagnosis. Precisely, what are the problems or issues facing the organization? Show the interrelationship among the problems or issues and their causes. Also formulate your priorities of handling these problems or issues. Support all your viewpoints with factual evidence, reasons, sound assumptions and good judgments.
- g) Develop well composed and supported major conclusions, and, recommendations for actions. Provide supporting arguments to convince the "inevitability" of your conclusions and recommendations for actions. Show maturity by suggesting how you plan to effectively implement your recommendations for actions. Show how your implementation would significantly improve the current organizational situation, whereby the key problems or issues will be most effectively addressed and handled.
- h) Decide! Make decision about the actions that you should take. Keep your reasons ready.

The Classroom Case Discussion Process

Some of useful suggestions for effective case discussions to remember are:

- a) Show initiative: lead with original ideas, analyses, viewpoints, strategies, solutions, conceptual relevance to the case situation before others express their views. Be a leader not a follower, as far as possible.
- b) Also be a good team player and a group discussion friendly person through effective and cordial participation.

- c) Learn from others, from what they say and argue. If so needed, correct your earlier viewpoint. Being both, expressive of one's own ideas, and, open to those of others, are very important. Discussions evolve, and, so each participant must develop with each stage of development of discussions.
- d) Assume that people have read the case. Straight away aim at the most important issues, discuss their analyses, and converge towards your preferred solution (if the class accepts your views).
- e) Prepare beforehand to make significant contributions of vital, original ideas and recommendations for actions. Be careful: do not equate excessive talking with meaningful contribution to the discussions; avoid following expanding others' viewpoints or ideas; avoid asking information types of questions.
- f) Have all the important facts and information of the case clearly organized on a "framework." You can refer to the framework as you discuss with your class. You will have all the information at your fingertips.
- g) In your discussions, stay close to facts and credible information from the case and elsewhere (internet, recent published reports, business press, industry publications, secondary data, etc.) as you argue. Keep on presenting facts to prove your point of view. If you start to feel that your point of view is not as valid, change your viewpoint. Adopt a more viable, operation-able viewpoint. For the next case onwards, prepare more thoroughly. Think harder before making up your viewpoint. Be sure to create likely criticisms.
- h) Derive important lessons of the case discussions, such as: the existing and newer concepts brought to light, and the extent to which they are applicable in some catalytic, supporting circumstances, special implementation guides.

Conclusions

Some meaningful conclusions are:

- a) Prepare very thoroughly. Organize your case data and information on a framework type of notes. Be very clear about what is to be done and why? Choose the most optimum course of action. Review this framework so you will be able to use it fluently in the heat of classroom discussions.
- b) Anticipate all possible arguments that you could encounter. Have prepared all the correct, well supported counter arguments. Be ready with financial and other quantitative data which are well organized and ready for presentation in the form of arguments.
- c) Mention the concepts and ideas from all chapters that may be relevant to the analyses of the case, even those chapters that are not taught in class. Show the connection between theory and the case situation.
- d) Demonstrate your clear understanding of the organizational situation, the definition of its problem(s). If the organizational situation is very complex, i.e., it has too many interrelated problems and issues; organize them with a clear mind. A clear mind is a triumphant mind. Finalize in your own mind what you think is the best assessment of the organizational situation. And, also from the confusing maze of the many issues, choose the correct mix of solutions. Be decisive. Yet be flexible to adapt as you go about implementing the solution.
- e) Have clear supported conclusions and recommendations for actions. Show how you would implement your recommendations. What additional resources would you need? In what situation would your recommendations work best? Certain recommendations are better pursued immediately, other, later. Develop a time line for implementation of actions and activities.
- f) Do all your recommendations address (or solve) all the important problems and issues facing the organization? Or, do they fall short?
- g) What is the main moral of the case? What are the main conclusions of and findings from the case? What should the students finally take with them after the class discussion? How does this case analyses help in the learning of the subject of the course? From this case, what do you take to the concepts?
- h) What are the likely future concepts and applications, even in the broadest forms, regarding this issues and practice?

It may be argued that case should be supported by other techniques of teaching. Case method all by itself can be incomplete and so it should have supporting methods of instruction. Although it is a well regarded approach for education of business school students, it needs some supplemental approaches to help the students' better grasp of the underlying concepts that may help the students to analyze the case better.

Experience in the use of the case method would result in being a capable and skilled case instructor. Teaching (using any kind of approaches) is a blend of art and science. It is a skill that comes about from continuous practice and experimenting. Practice in using the case method, like in any other specialized activity such as playing chess, and,

whether as a student or an instructor of case method, contributes towards greater self-confidence, fluency and facility. There is no substitute for an experienced case method instructor.

It would be beneficial for the students to have the students discuss among themselves in small groups in the classroom to familiarize and upload the issues the case, often under the instructor's guidance on some broad issues for the small group discussions. Then the students would re-group in class as a whole to discuss the case, with the instructor leading the discussion. The students reading beforehand about a broad series of potential relevant concepts would improve the understanding of the issues in the case. These approaches would enhance the effectiveness of the case method. Besides the experience and maturity in the case method of the students and the instructor, the effectiveness of the case method is only as good as the quality of preparation of the cases before class. Good case preparation is the prerequisite of a good classroom case discussion.

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Author's Information

Dr. Yezdi H. Godiwalla is Professor of Management in College of Business and Economics, University of Wisconsin-Whitewater, USA, for nearly four decades.

He is a recipient of his current University's highest valued award, "Roseman Teaching Excellence Award", and, the College Research Award. He is also a recipient of, "The First Runner Up, Most Favorite Marketing Instructor", award from his PhD studies university, Oklahoma State University, USA.

He has BA Honours, Ranchi University, India; MBA, Indian Institute of Management-Ahmedabad; and PhD, Oklahoma State University, USA. He has some six years of practicing executive experience with Tata Steel company, Jamshedpur, India, and, Godrej and Boyce Co., Bombay, India. He has almost 50 years of professional and academic experience in the fields of strategic management, international management, social responsibility, and organizational theory and behavior in industry, university and consulting settings. He has conducted numerous professional conferences and seminars for scholar and practitioners. He has published 3 research and scholarly books, and, he has published or presented over 300 scholarly, peer-reviewed: journal articles, academic conference research papers, academic conference discussions/reviews, academic book reviews, and academic/professional seminars. In administrative roles at the university, he has served as: the management department chairman, and, organization committee chairman. He has also served on numerous faculty and administrative committees in his university and in academic and professional organizations and on boards of reviewers of scholarly journals.