Teaching with the Case Method

Frank Schultz

Special Credit and Thanks to Wasim Azhar for Designing Original and Earlier Versions of this Presentation
Gillette’s Energy Drain: The Acquisition of Duracell
What Did You Observe?
Haas’ Teaching Excellence Model

- Learning Goals
- Design & Structure
- Assessment
- Instructional Strategies
- Learning Activities

Student Learning
Today’s goals and agenda

- Why Cases?
- Before the Class
- During the Class
- After the Class
WHY CASES?
Need Theory and Application
Enhances Pre-Class Learning
Learning goals:
Higher order thinking

Anderson, Krathwohl and Colleagues 2001, revision of Bloom (1956)
Learning goals: Higher order thinking

Higher order skills

Lower order skills

Remember (recognize, recall)

Understand (summarize, infer, explain, interpret)

Apply (execute, implement)

Analyze (organize, differentiate)

Evaluate (critique, judge)

Create (generate, plan)

Anderson, Krathwohl and Colleagues 2001, revision of Bloom (1956)
Individual and Group Learning
Engaging!
BEFORE CLASS
Pre-Conditions

- Mutual respect between instructor and students, and between students
- Instructor and students come to class on time and are very well-prepared
- Instructor and students apply rigorous standards and are willing to take risks and consider alternative viewpoints
- The case, supporting materials, assignment questions, and teaching plan are well designed and are part of an integrated course

Credit: Wasim Azhar
Roles and Responsibilities

Instructor:
- Prepares both content and process
- Listens thoughtfully throughout discussion
- Manages class flow and structure
- Responds flexibly to student comments
- Poses challenging questions, employs cold/warm calls, and follow-ups to promote high quality class discussion
- Facilitates students ‘discovery’ of the case learnings
- Provides appropriate closure to discussion segments, class sessions, and course modules

Credit: Wasim Azhar
Roles and Responsibilities

Students:

- Prepare the cases thoroughly for class discussion
- Participate and listen actively throughout class
- Contribute ideas, analysis, synthesis and personal experiences (instead of simply presenting case facts)
- Build on each other’s comments and critique and debate different viewpoints
- Consider it a ‘fitness gym’ rather than a ‘tanning salon’ for learning

Credit: Wasim Azhar
Case Sources

Berkeley-Haas Case Series

HARVARD BUSINESS FOR EDUCATORS

Ivey Publishing

Darden Business Publishing

University of Virginia
Other Sources

FT
FINANCIAL TIMES

THE WALL STREET JOURNAL.

You!
Case Suggestions

- Good cases are hard to find!
- Pick cases where students have to connect the dots and/or where you can look brilliant
- Cases with teaching notes can be very helpful
- Try for a variety of industries
- Strongly consider diversity of case protagonists
- Pick cases where you have some value added knowledge
- By the eleventh teaching of a case – you will have it down
Study.Net

- Where you will post all cases and readings
- Copyrighted Material Must Go Here
  - Non-copyrighted material can go in bCourses
  - NEVER post Teaching Notes anywhere
- Will show you if other faculty have used the case
  - First to Use Gets Ongoing Priority
- Check CTE Website for Syllabi and Previous Use of Cases
Get to Know Your Students!

Kettner, Lauren (Lauren)
Sonoma State University
Communication Studies
LifeScan, Inc.
Employee Communications Sr. Specialist
2014

Lacroix, Matthew (Matt)
University of Notre Dame
Management Information Systems
KPMG
Senior Associate, IT Advisory
2015

Lai, Eric (Eric)
University of California, San Diego
Electrical Engineering
SPAWAR
Project Manager
2015
Planning!

Key Takeaways

Pastures

Calling Pattern

Board Plan
Planning!

Visit Your Classroom

Know Your Technology
Planning - Mixing It Up

Props/Samples

Video Clips

Guests
How will you grade?

- You must provide an incentive for rigorous preparation
- Case writeups
- Case presentations
  - Individual or Team
- Class participation

- Clarity in advance is critical!
DURING CLASS
How Much Control?

Total Chaos  
Good Luck with That!

Total Control  
New Case Teacher  
Traditional Lecture Format

Experienced Case Teacher  
Might Appear

Is
Keeping on Track Once it Starts
Notes? Slides? Memory?
Opening Moves

- Post Agenda on board showing roadmap of topics

- Select student to be Opener considering
  - Student background/experience
  - Course timing
  - Level of complexity of case
  - Other?

- Begin developing Board Plan in conjunction with opener’s comments as canvas for discussion

Credit: Wasim Azhar
Middle Game

- Kindle discussion
  - Ask provocative questions
  - Play devil’s advocate
  - Cross question to elicit deeper thinking
  - Solicit input from a range of students
  - Acknowledge and highlight key comments
  - Move around the class. Avoid being glued to the board or laptop.
  - Spark debate, sometimes moving behind students to make them debate with each another:
    - employ role play;
    - poll students on decisions and recommendations

Credit: Wasim Azhar
Middle Game - continued

- Actively manage the discussion
  - Select *pivots* to steer discussion
  - Keep an eye on the clock to plan *transition points* to new pastures
  - Elucidate learning objectives with *leading questions*
  - *Tie-in* previously-made points to current comments
  - Build an *integrated canvas* on the board along with the discussion
  - Spread the *air-time*; avoid air-hogs.
  - Be *flexible* regarding directions discussion can take
  - Use a ‘*parking lot*’ for valid but tangential points raised

Credit: Wasim Azhar
End Game

- Elicit Takeaways and Learning from participants and build on them with your own wrap-up; follow up on unresolved issues
- May discuss any recent developments depending on objectives
- Use Powerpoint slides to:
  - Summarize discussion and analysis
  - Connect case analysis to theory / frameworks
  - Link class discussion to previous classes; set stage for next class
  - Draw attention to relevant research and articles of related interest

Credit: Wasim Azhar
AFTER CLASS
Wait, It's Not Over

- Class participation grading
- Posting followup information in bCourse
- Other grading (i.e. case writeups) – shoot for before next class session – your course evaluations will be impacted by your grading turnaround time
- Notes for next rendition
Common Pitfalls

- Failing to trust the class
  - Set contract early with the class
  - Don’t over-structure sessions
- Falling back into lecture mode, making it a ‘tanning salon’
- Not having enough material for class session
- Trying to do too much in a single session
- Lacking enthusiasm:
  - Speaking in a monotone
  - Not moving around in class
  - Calling on stale hands or airhogs

Credit: Wasim Azhar
Common Pitfalls

- Not managing time and transitions well, - having a haphazard discussion
- Insufficient preparation
  - Not matching case complexity to level of students
  - Preparing the wrong case
  - Not having enough material for discussion
- Calling Patterns not thought out

Credit: Wasim Azhar