



Designing and Delivering a Case Method Course

Session Objectives

- **Understand characteristics of effective case method teaching**
- **Identify special opportunities and tasks**
- **Learn how to successfully plan a case-dependent course**
- **Develop “Game plan” for case discussions**
- **Review common pitfalls**



° **SOME CHARACTERISTICS
OF EFFECTIVE CASE
METHOD TEACHING**

Outcomes

- **In-class learning substantially exceeds pre-class learning**
- **Learning extends beyond the individual class**
- **Students are engaged, energized and challenged by class discussions**
- **Students discover, articulate and develop most critical insights, with the instructor's help**
- **Students participate in applications of theoretical models, frameworks and concepts to actual business situations**

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 view points**
- **The case, supporting materials, assignment questions, and teaching plan are well designed and are part of an integrated course**



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**

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**



° **SPECIAL
OPPORTUNITIES AND
TASKS**

Special Opportunities

- Plan to use professional experience of Haas students to elucidate learning from each case.
 - Get to **know your students** by checking their professional profiles to design your calling pattern
 - Encourage students to **share** their knowledge, experiences, and perspectives
 - Encourage alternative points of view - devil's advocates add to the richness of the discussion and learnings
 - Trigger those not contributing to class discussion using **cold and warm calls**
 - Be **engaged and enthusiastic** to feed student enthusiasm and interaction among students
- Invite relevant case protagonists or **guest speakers** to share their experience, knowledge and perspectives.



Special Tasks

- **Knitting together cases to form an integrated course**
- **Managing Discussion Flow and Transitions between Pastures**
- **Accomplishing Learning Objectives**



TIPS FOR PLANNING A CASE-DEPENDENT COURSE

Integrating Case-Dependent Courses

- Segment course into **Modules and Key Topics** to be covered in each module
- Get a **first cut** on candidate cases
 - HBS site: <http://hbsp.harvard.edu/>.
 - Haas: cmr.berkeley.edu/berkeley_haas_cases.html
- Match candidate cases to **Learning Objectives and Course Topics** from your course plan
- **Whittle down** case selection by analyzing the cases and reading the Teaching Notes if available.
- **Check CTE case database** website to ascertain if the cases have been used in other courses.
- **Cull** the whittled down cases **to fit** the case sessions planned.
 - Try to have cases covering a variety of products and industries.
 - Limit cases on industries that you are not comfortable with.

Tips

- Guide student preparation by including **Discussion Questions** and/or **Key Topics** in the syllabus.
- Contact relevant **Guest Speakers** early to book them.
- Plan some **sessions for review**, integrating concepts developed through cases and setting stage for remaining sessions.
- Develop a **grading formula** that includes class participation and written analyses of cases
 - In syllabus include class participation grading scale and template for evaluating written case analyses



Conducting case discussion



GAME PLAN



Preparation: Before Class

- **Review** your **Learning Objectives** for the class session, and your plan to extract these objectives from the case
- Identify a range of **questions** to prompt and transition the discussion
- Decide how **flexible** you are going to be during class in guiding the discussion
- Review your **Board Plan** and **Calling Pattern**

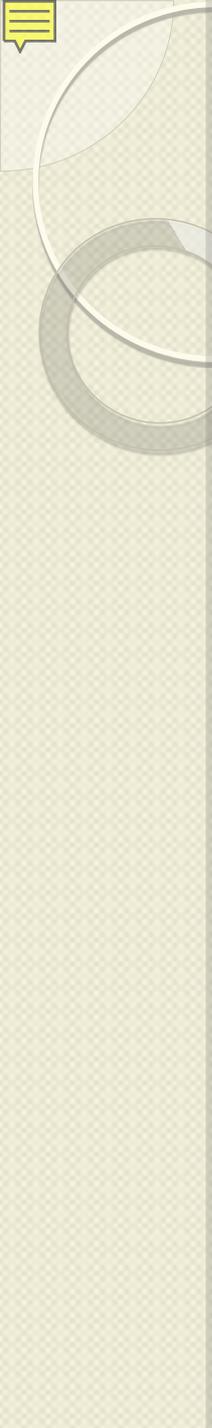
Preparation: Before Class

- Do your own **exhaustive analysis** of the case from multiple angles
 - Prepares you to tackle different discussion paths, analyses and recommendations
- Organize your thoughts on **note sheets** to access as needed during discussion
 - Allocate time for various discussion pastures
 - Plan where and how to use relevant company/industry expertise of students



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



Middle Game

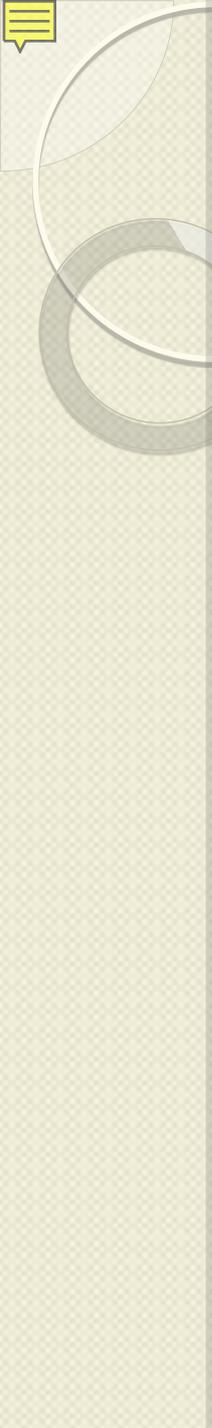
- **Kindle discussion**
 - Ask **provocative** questions
 - Play **devil's advocate**
 - Cross question to **elicit deeper thinking**
 - Solicit input from a **range of students**
 - Acknowledge and **highlight key comments**
 - **Move around** the class. **Avoid** being glued to the board or laptop.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

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

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



After the class...

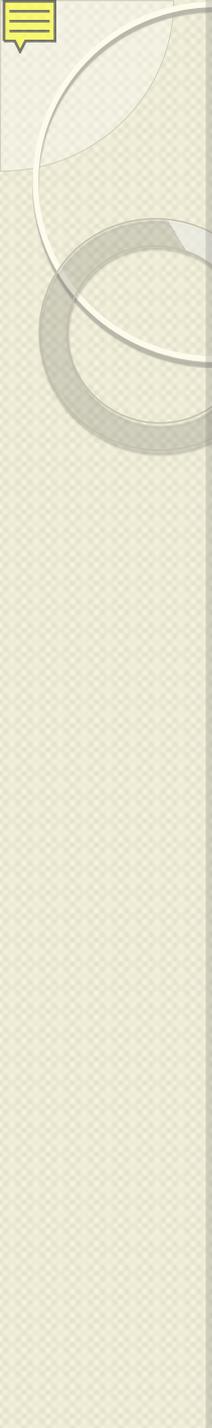
- **Make notes for next time:**
 - what went well
 - what could be improved
 - any new insights
- **Think about additions / modifications for future sessions based on this class discussion**
- **Assign class participation grade for the class session while fresh**

A CP grading scale

- **1 point:** Has read the case and is somewhat aware of the issues
- **2 points:** Has prepared the case thoroughly and dug deeper and grasped the main points and key issues in the case
- **3 points:** By extensive preparation has analyzed the case fully and lucidly expounded analyses
 - - proffered cogent recommendations
 - - overall has contributed substantially to class learning
- **4 points:** Through extensive preparation has been able to build frameworks and managerial learnings by linking case analyses and learnings from previous cases with the current case,
 - - contributed very substantially to class learning,
 - - steered class discussion to areas providing additional learning
- **5 points:** Contributed extremely to class learning and taught me something about the case



PITFALLS TO AVOID



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**

Common Pitfalls (contd)

- **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**

Pivotal Session A: First Class

- **Establish Learning Contract with students**
- **Lay out Course Objectives and Syllabus**
- **Explain Grading Scheme, including class participation grading scale**
- **Cover important deliverables and dates**
- **Emphasize importance of case preparation, class participation, and active listening to enhance learning**
- **Ask students to have name cards in front of them in every class, and to try and sit in the same seat**
- **Run through class protocol and other administrative details**
-- office hours, internet communication, class laptop policy etc.

Pivotal Session B: A Third to Middle of the Course

- **Solicit student feedback on course dynamics**
- **Incorporate suggested modifications that you consider justified and possible and that can add value to class learning**
- **Provide cogent rationale for aspects that remain unchanged**
- **Check which students have had relatively less airtime**
 - ***Plan to engage them in case discussions through cold calls and warm spotlights***
 - ***Send emails encouraging them to participate in class; ask them to let you know ahead of time if they are exceptionally prepared for a case session***

Pivotal Session C: Last Class

- **Review key takeaways and learnings gleaned through each session over the course**
- **Prepare students for future learnings**
 - **give references for future learning of subject matter**



Parting Thoughts

- **Elements of successful case method teaching are similar to those for any other method:**
 - **Trust your students!**
 - **Focus on student learning and learning objectives**
 - **Be prepared, engaged, and enthusiastic about the subject matter and the case situation**
 - **No one right method**
 - **First few sessions crucial to set tone**

Parting Thoughts - continued

- **Select interesting and educational material**
- **Share insights from practical experience and research**
- **Continuously update your case teaching notes**
- **It takes time and effort, but the payoff from using cases is high!**

WAC grading

- **Dimension 1: Depth of Analysis and Cogency of Recommendations**
- **Dimension 2: Content and Presentation**
- **Dimension 3: Quantitative and Conceptual analyses and understanding**

WAC: Areas to assess

- **Substantive work/effort**
- **Lucid managerial presentation, good flow of material**
- **Relevant numberwork to support analysis and recommendations,**
 - use of key metrics
- **Use of frameworks, templates, charts and exhibits to illustrate points,**
 - amplify and support analysis and recommendations
- **Extraction of key issues facing the company/protagonist,**
 - prioritizing goals,
 - gleaning relevant information from case,
 - assessment of options available,
 - delineation of recommendations supported by cogent rationale,
 - stating key managerial learning/takeaways from the case