

Teaching with the Case Method

Frank Schultz

Special Credit and Thanks to Wasim Azhar for Designing
Original and Earlier Versions of this Presentation



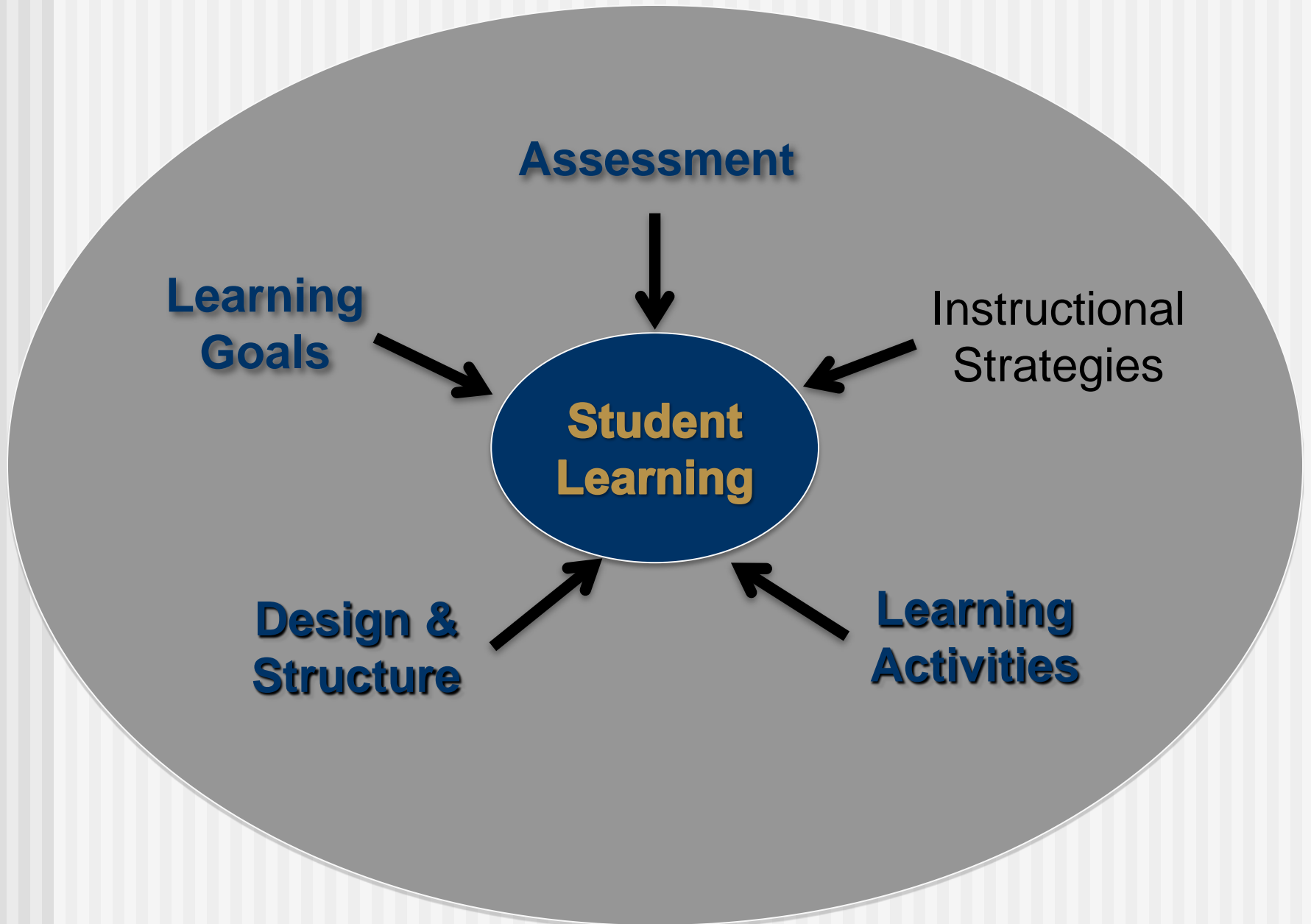
CENTER FOR TEACHING EXCELLENCE

Haas School of Business | University of California, Berkeley

Gillette's Energy Drain: The Acquisition of Duracell

What Did You Observe?

Haas' Teaching Excellence Model



Today's goals and agenda

- Why Cases?
- Before the Class
- During the Class
- After the Class

WHY CASES?

Need Theory and Application



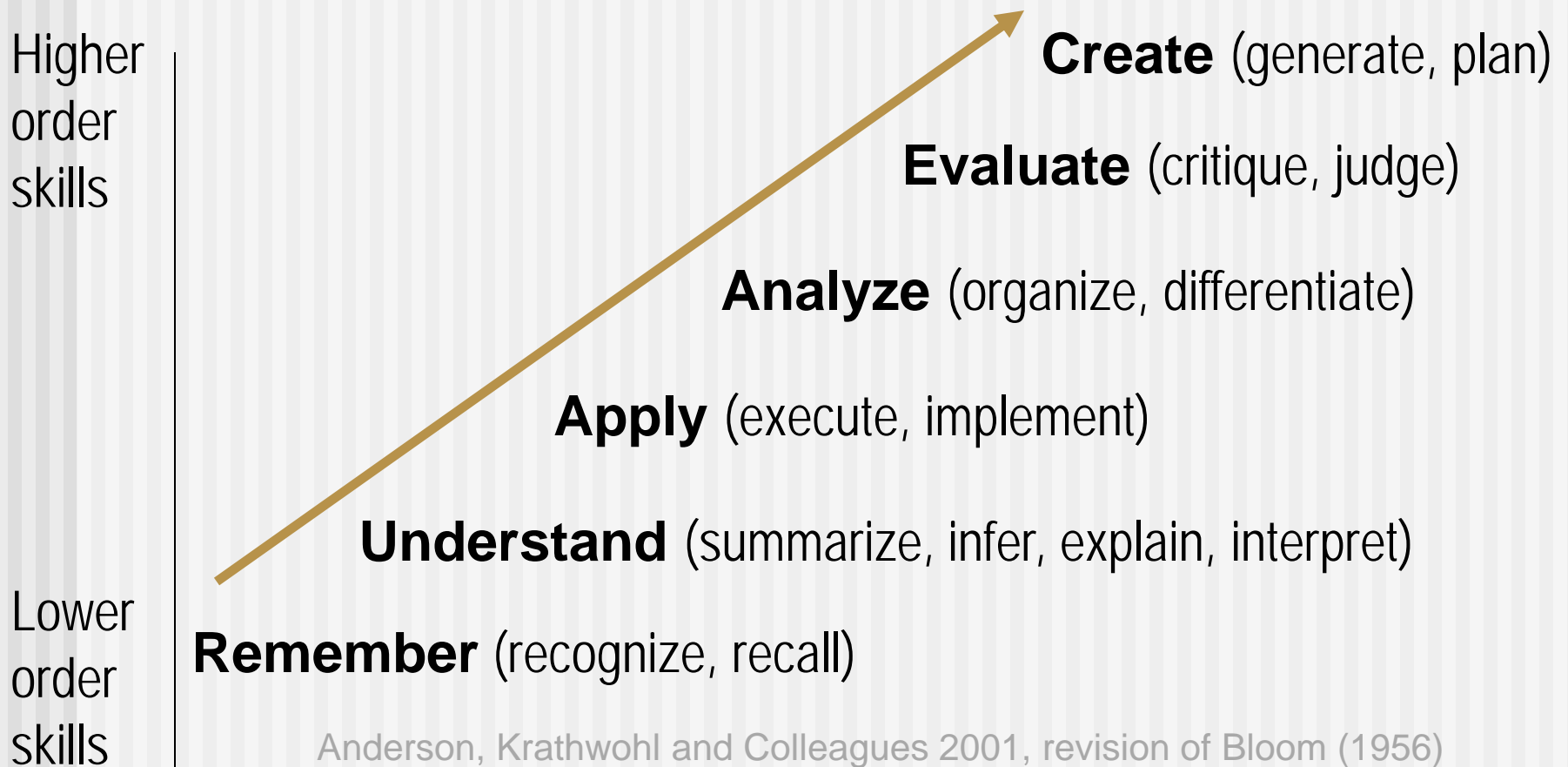
Enhances Pre-Class Learning



Learning goals: Higher order thinking



Learning goals: Higher order thinking



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 view points**
- **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



Other Sources



THE WALL STREET JOURNAL.



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

- 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!

EW257.11

Leadership

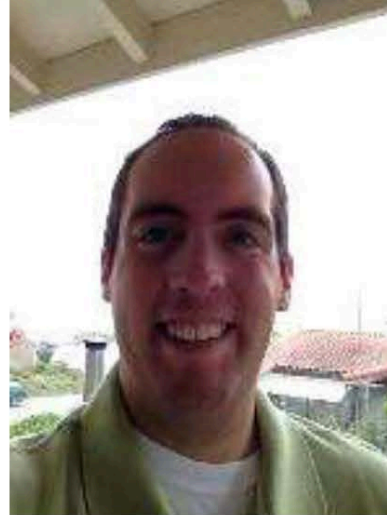
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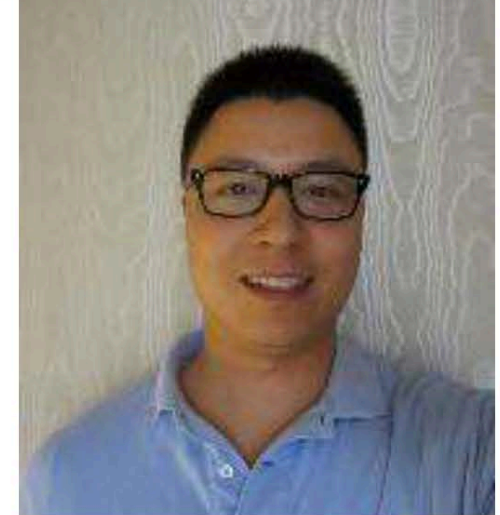
9/12/2013 9:00:00 AM C110



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



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



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



Planning!



Key Takeaways



Pastures



Calling Pattern



Board Plan

Planning!



Visit Your Classroom



Know Your Technology



bCourses Courses ▾ Assignments Grades Calendar

Configure Communication Preferences

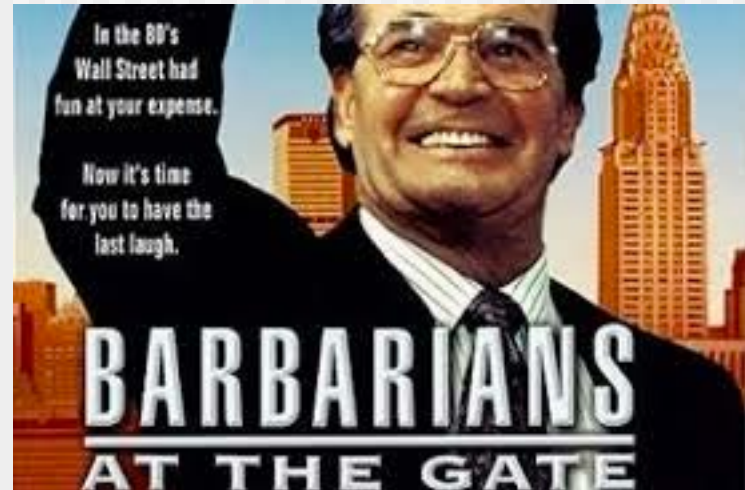
Now that you're registered with Canvas, you might want to configure what notifications you receive as your courses progress. Canvas is flexible enough to let you choose how and if events you'd like to be notified. When things happen in your courses you can choose to be notified via email or text to your cell immediately, daily or weekly.

[Configure Communication Preferences](#)

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

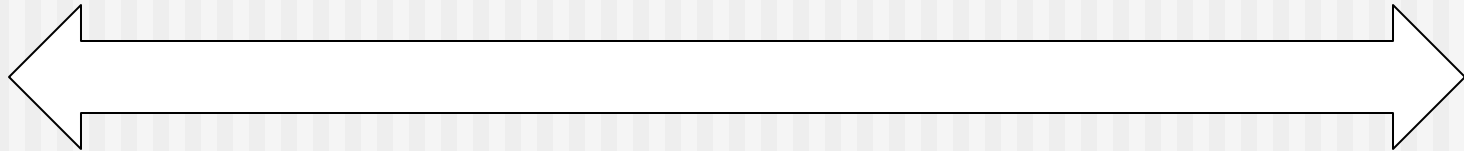
- Clarity in advance is critical!

DURING CLASS

How Much Control?

Total Chaos

Total Control

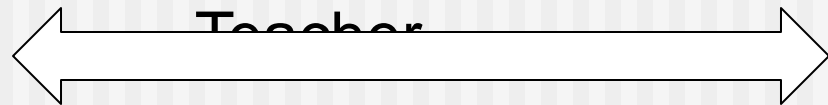


Good Luck
with That!

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, Its 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