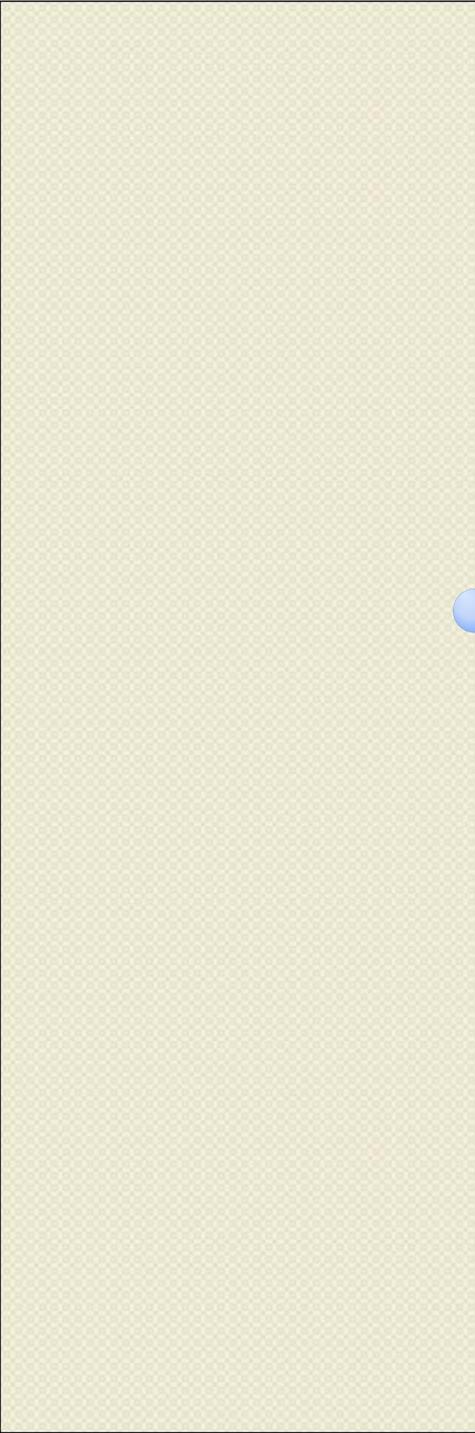# Designing and Delivering a Case Method Course

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 session**

- **Students are engaged, energized and challenged by class discussions**
  (Question the Status Quo)

- **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** *(Question the Status Quo)*

- **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 Haas 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 *(Question the Status Quo & Students Always)***

  - **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**
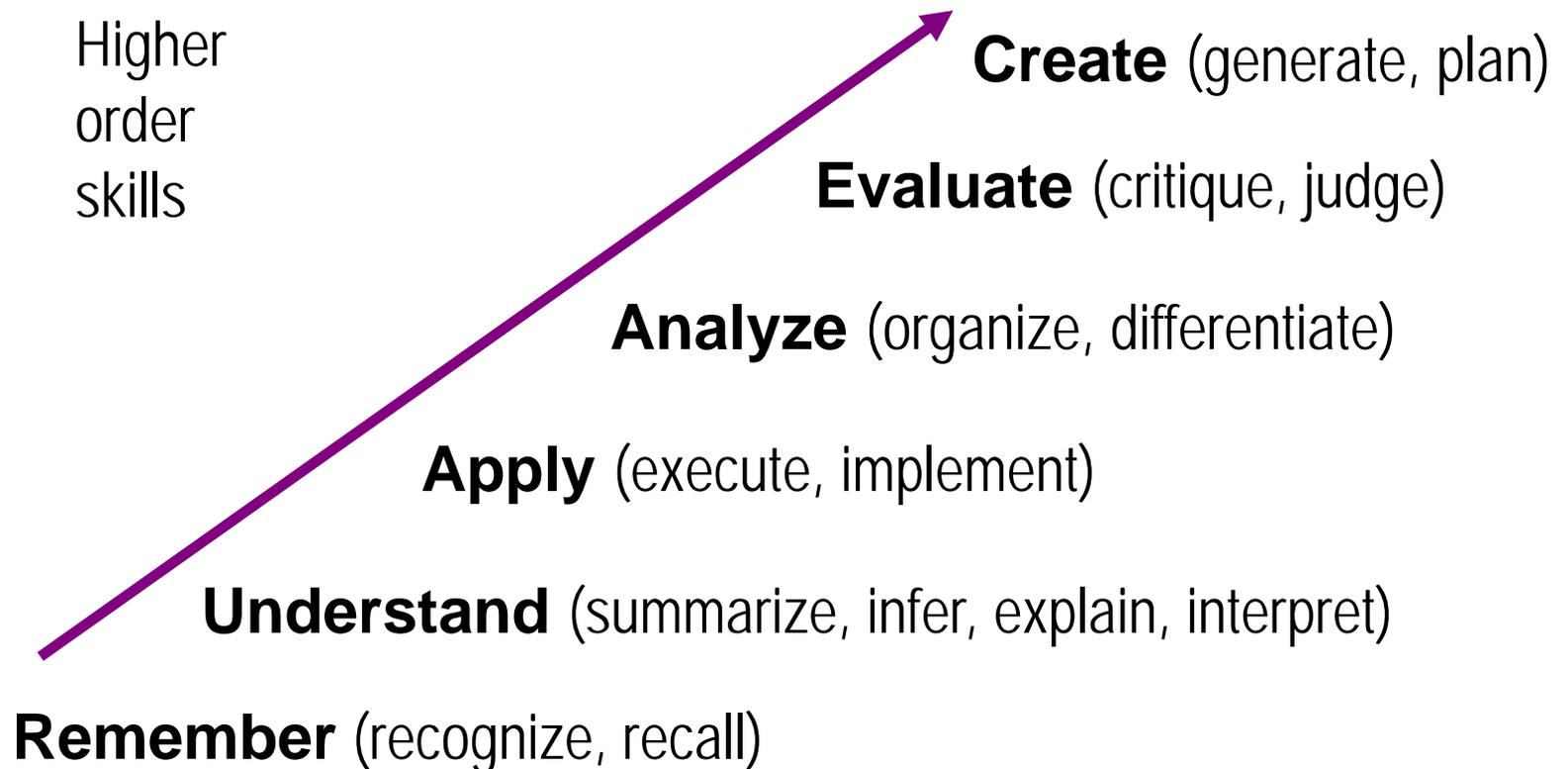
- **Accomplishing Learning Objectives**
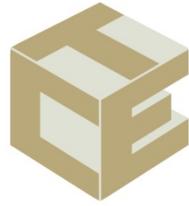
SOME GUIDELINES FOR PLANNING A CASE-DEPENDENT COURSE

WHY CASES?

Learning goals:
Higher order thinking

Higher order skills

Lower order skills

Create (generate, plan)

Evaluate (critique, judge)

Analyze (organize, differentiate)

Apply (execute, implement)

Understand (summarize, infer, explain, interpret)

Remember (recognize, recall)

Source: Anderson, Krathwohl and Colleagues 2001

Learning goals:
Higher order thinking

Individual and Group Learning

Engaging!

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 Haas 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.**

Some Case Sources

Berkeley-Haas
Case Series

HARVARD BUSINESS PUBLISHING — FOR EDUCATORS

IVEY | Publishing

DARDEN BUSINESS PUBLISHING
UNIVERSITY of VIRGINIA

Other Sources

You!

Case Selection Suggestions

- Good relevant cases are hard to find!

- Pick cases where students have to connect the dots and stretch their minds *(Beyond Yourself*)

- Cases with good teaching notes can be very helpful

- Strongly consider diversity of case protagonists

- Pick cases where you have some value adding knowledge

N.B. By the *nth* teaching of a case – you will have it mastered (relatively)

Course Design 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**

Course Design: Mixing It Up

Props/Samples
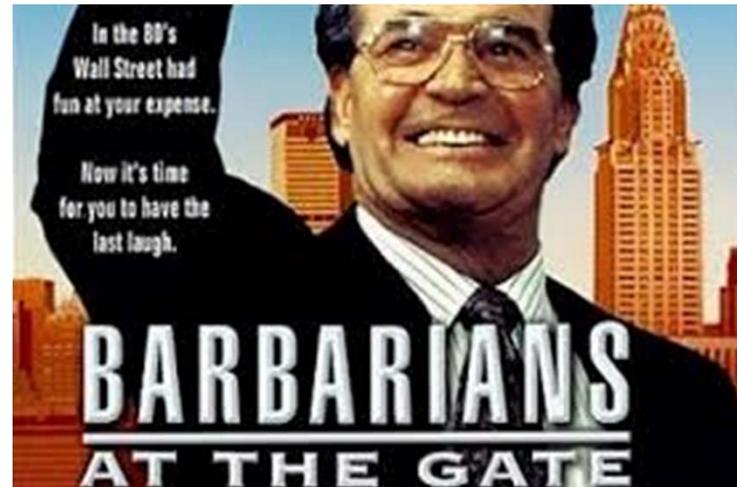
Video Clips

Guests

Study.Net

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**

Conducting case discussion

GAME PLAN

Preparation: Before the First Class:

Visit Your Classroom   Know Your Technology

Preparation: Before Class: Get to Know Your Students

| EW257.11 | Leadership | | Schultz | S | 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

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**

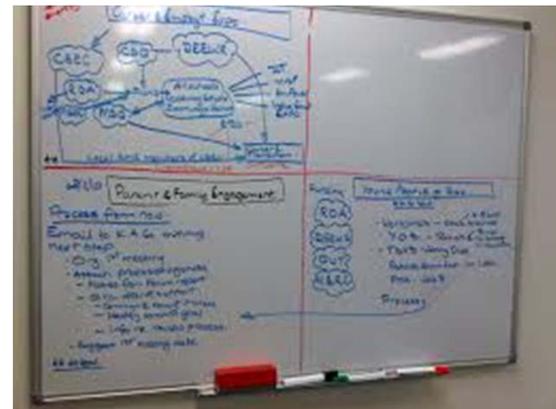# Preparation: Formulating and Reviewing Key Aspects of Your Plan

Key Takeaways

Pastures

Calling Pattern

Board Plan

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**

How Much Control?

Total Chaos   Total Control

Good Luck
with That!   New Case   Traditional
                                    Teacher   Lecture
                                                    Format

                          Experienced
                          Case Teacher

            Might Appear   Is

Challenge of Keeping on Track Once Class Starts - Notes? Slides? Memory?..

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** *(Students Always)*

- **Assign class participation grade for the class session while fresh**

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**

Some 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**

.. Some Parting Thoughts

- **Select interesting and educational material**

- **Share insights from practical experience and research**

- **Continuously update your case teaching notes**
  (Students Always)

- **It takes time and effort, but the payoff from using cases is high!**

A CP grading scale

- **1 point:** Participant has read the case and is somewhat aware of the issues

- **2 points:** Participant has prepared the case thoroughly and dug deeper and grasped the main points and key issues in the case

- **3 points:** By extensive preparation, participant has analyzed the case fully and lucidly expounded analyses:
  - proffered cogent recommendations
  - overall has contributed substantially to class learning

- **4 points:** Through extensive preparation, participant built frameworks and managerial learnings by linking case analyses and takeaways from previous cases with current case:
  - so contributed very substantially to class learning,

- **5 points:** Contributed extremely to class learning and steered class discussion to areas providing additional learning *(Confidence Without Attitude)*

- **6 Points:** Made a substantive presentation and/or taught me something about the case *(Students Always)*

Written Analysis of a case (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