

Is Case Teaching Right for You? Insights on Case Teaching for the Case Novice

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Case teaching isn't for everyone. Based on my own very small sample, many of those who have tried it either say it was their best, or worst, teaching experience. In this article I summarize case teaching information that I gained from a two day workshop on case teaching presented by Ivey Business School at Western University. I also include many of my own insights and opinions. I am admittedly a novice in case teaching. This may be helpful for those just beginning to contemplate case teaching; alternatively, it may be much less helpful for the experienced case teacher. To begin, here are ten questions I suggest you ask yourself if you're considering teaching with cases:

Questions about You

1. Am I comfortable giving up control of my classroom?
2. Am I comfortable having the students do most of the talking in class?
3. Do I feel that it's relatively more important to develop critical thinking skills than to cover a lot of content in this course?

Questions about Your Students

4. Will students in this course prepare materials ahead of time if asked to do so?
5. Will students in this course actively participate in class if asked to do so?
6. Will students in this course (learn to) be comfortable critiquing each other's ideas, and having their own ideas critiqued?

Questions about Your Course

7. Does the course material contain complex, interrelated concepts?
8. Does the course material have many "grey areas", with more than one right answer?
9. Does the course material require students to make complex decisions?

Bonus Question

10. Do quality cases, or case materials, exist for my course topic?

If you answered yes to all, or most, of these questions, then case teaching might be a rewarding route for you and your students. Great case teaching experiences depend upon many things, including a

flexible instructor outlook, advance student preparation, a complex topic area with subjective outcomes, and the availability of strong case materials. If you've ticked these boxes, then read on for a very abbreviated perspective on how to teach with cases.

Tips for Teaching with Cases

Getting Started

First I'd like to reiterate—I do not have a great deal of experience teaching with cases (yet). I do have fresh knowledge regarding case teaching, from a two-day seminar at one of Canada's premier case teaching institutions, the Ivey Business School at Western University. For that I thank the U of L Teaching Centre Advisory Council and the Faculty of Management Teaching Excellence Committee for their financial support.

At the heart of case teaching is the notion that students will learn more, and learn it more deeply, if they arrive at the solution themselves, rather than having it given to them. Case teaching is sometimes said to have begun at Harvard Law School, though this basic teaching philosophy can be traced back to the Socratic Method. Case teaching has been popularized in business and management schools/faculties, however it is also used in many other fields. Many if not most fields of study can potentially benefit in some way from a case teaching approach.

Case teaching seeks to help students solve problems on their own through critical thinking. To solve a problem, a case teacher will break it down into a series of questions, leading students to the answer. Rather than lecturing or instructing, a case teacher asks questions and facilitates student discussion, so that students learn from each other. The primary goal for a case teacher is to encourage students to ask good questions, not to give them the answers.

Selecting a Case

For some, case teaching is all encompassing. All material throughout the course is delivered via case discussion. For most however, cases accompany and supplement other course material. Larger cases may serve as the focus of an entire class period, or several class periods. Smaller cases may be handed out during class for students to read with no advanced preparation, consuming only part of the class period.

The structure of cases varies, thus offering different teaching opportunities. Cases may provide all the necessary information for decision making, in an organized manner. Alternatively, they may be missing desirable information, contain unneeded information, and intentionally lack organization. These devices are intended to challenge the student in a manner more similar to real-world scenarios. Some cases state a decision that was taken and seek a critique of the decision, others request that a decision be made. Some provide specific decision alternatives, others do not. Which type to choose depends upon the instructor's learning goals and students' abilities.

The basic foundation of a case includes:

(a) What is the dilemma?

(b) What data are available?

(c) Who is the cast? What are their backgrounds?

(d) When and where does this take place, and what impact does that have?

Basic Case Teaching Process (Rowe, 2016)

(Erskine and Leender, personal communication, as cited in Rowe, 2016)

Set-up

Arrange the room in a horseshoe, so all can see, and speak to, each other.

Have a board to record class discussion

Opening

Begin with greetings and class announcements

Introduce the case, what it's about and why you selected it

Discussion

During the discussion you may choose to ask the questions below specifically, or seek to draw them out in a less direct manner. A staged learning process can be very helpful for all or part of this process. This involves first having individuals address the central questions on their own, then having them discuss it in a small group, and finally sharing the small group outcomes and discussing further as a large group. It's important that the class agrees on the case basics before proceeding with how to solve the problem. Discussion should address the following issues:

1. WHO: Identify who must make the decision (the actor).
2. WHAT: Identify the actor's responsibilities and what decision must be made.
3. WHY: Why did the problem occur?
4. HOW: How might the problem be solved? What are your decision alternatives? Try to get the class to list as many potential alternatives as possible before you begin discussing the details of each.
5. CRITIQUE: Now you can begin to reduce the number of alternatives. Students can discuss pros and cons for each. Work toward consensus.
6. SOLUTION: Identify the class' preferred decision. Time permitting, you may first want to have the class identify decision criteria. What criteria must be met for a decision to be considered or selected? It is also valuable to identify any assumptions you must make. Most cases do not provide all of the desired information. What is missing? How are you filling these gaps? Guiding students to become aware of how they are weighting factors and interpreting information can lead to better decisions.

7. ACTION PLAN: Discuss how to implement the decision. It's useful to have the class determine a reasonable timeline for implementation. For each task that must be accomplished, indicate who, when, how much, from where, and how you will monitor and control this. A good solution must be realistically actionable in a reasonable time frame.

Conclusion

Summarize key lessons learned. Tie class discussion to the theoretic principles you wished to demonstrate with the case. This step is vital in order to solidify the learning that has transpired. There should be a sense of closure.

Communication Tactics

Case teaching tends to be a more confrontational teaching style than a standard lecture approach. Students are asked to share their views and ideas, and others do not always agree. The instructor can further impact the classroom environment by choosing different interaction tactics.

The instructor must decide whether or not to "cold call" students. Pretty much universally students do not like cold calling, but cold calling serves the very valuable purpose of assuring that students are prepared for class. It is quite difficult spending an entire class period discussing a case that few students have prepared.

The instructor must also decide whether to ask directive or open questions (or some combination), specifically considering when and why to use each, as well as how students may respond. Directive questions are useful for guiding students, if you are concerned that they may not get to the place you hope in a reasonable time frame. After students become more familiar with the case approach, it may be less necessary to guide them.

Listen carefully as students speak. Make eye contact and give the speaker your full attention. Ask further clarification questions; engage in a dialog. Then, make notes on the board to preserve the student's comments. Link together students' suggestions.

It's important to keep control of class discussion in order to effectively manage both time and learning. However, it is equally important to "let go". Cases are about students learning from each other, and from their own reasoning. Cases are not about "filling the vessel", or imparting the instructor's knowledge. Cases usually do not have one "right answer"—if all parties remember this, then students will be more willing to participate, and interaction will be richer.

Closing Comments

Giving up control in the classroom can feel risky. With a lecture, the instructor charts the course. Getting from point A to point B is predictable. Not so with case teaching. Case teaching is much more about the process of inquiry than the material itself. If you are interested in pushing your students toward critical thinking, and wish to see them take ownership of their own learning, you may want to give it a try.

Reference

Rowe, W. G. (2016, May 10-13). Case Writing Workshop. Ivey Business School Western University, Canada.