

Twenty-Five Questions to Ask When Using Cases with Undergraduates

A Technical Paper by Scott Andrews & Trevor Williamson

“The case method is not only the most relevant and practical way to learn managerial skills, it’s exciting and fun. But it can be confusing if you don’t know much about it”
(Hammond, 1976) Harvard

This paper seeks to explore the key questions that need to be addressed in order to ensure best practice for case use with undergraduates. Even within undergraduate circles, it is widely appreciated that many different types of learner can be found. So this is by no means a ‘how to..’ article but rather intended to provoke further thinking on the issues related to using cases with often younger and less experienced learners. With this in mind, the paper doesn’t seek to answer questions but rather to ensure that the correct questions are being raised. As such 25 of the most widely reviewed and discussed issues collated from a wide pool of practitioners of the case method are presented below, with additional prompters to serve as a template for future case selection and undergraduate course planning.

The use of cases in management education has established a widely accepted track record over many decades since its first use amongst Harvard Masters Students in the early 1920’s.

“Case method provides the means for allowing students to either develop theory or make their own theories-in-action explicit in a forum where they can be re-examined in ways that are not likely to happen elsewhere” (Clawson, 1995) Darden USA

However, it is only in recent years that the management case, once the preserve of the post-graduate learner, has become a regular tool in the undergraduate tutor’s toolkit.

“Thinking out original answers to new problems or giving new interpretations to old problems is assumed in much undergraduate instruction to be an adult function and, as such, one properly denied to students.” (Gragg, 1940) Harvard

The growing use of cases with undergraduates is widely recognised given the growing diversity of cases submitted to global collections (varying in length and format) and the growing demand for further training in case use amongst undergraduates.

“A case must be written in a simple, narrative absorbing style to keep the class engaged. At the end of the day, a case should have learning value for the students.”
(Vedpuriswar, 2003) ICFAI India

“Good cases are like onions – the more you peel away the outer layers, the more you discover inside” (Abell, 1997) IMD Switzerland

A. ABOUT THE LEARNER

1. Who are the learners?
 - How many of them are there?
 - Where are they in terms of their degree programme? – Stage 1, 2, 3, 4
2. What previous experiences of cases do my students have?
 - How many cases have they experienced?
 - What types of cases have they experienced?
 - What roles and responsibilities have they had to demonstrate in previous cases?
3. What previous experiences of the world do my students bring into the classroom?
 - Have they completed a placement?
 - Are they adult learners?
4. What are their prior experiences of different approaches to learning or different teaching methods?
 - To what extent are they likely to understand, appreciate, accept the role / value of case teaching?
 - Can some reluctance to engage be anticipated?

B. ABOUT THE CASE

5. What type of case best meets the needs at this moment in time?
 - exercise case
 - decision making
 - complex
 - situational
 - incident
 - background
6. What aspect of learning and development is being tested with this case?
 - Is it the best tool to test and develop these aspects?
 - Am I able to clarify to the students the expected learning outcomes?
7. How does the case best engage, motivate and inform the student?
 - Is the topic/subject/organisation/setting appropriate for the students?
 - Is there scope for incorporating role play into the case?
 - Will the students be working independently and/or in groups?
 - Is it the right length?
 - Is it the right level of complexity?
 - How onerous will student preparation be?

8. How does the case best engage, motivate and inform the tutor?

- Is there sufficient material for the tutor to use to guide a journey of discovery?
- Is there a teaching note?
- How onerous will tutor preparation be?

9. How can existing cases be 'modified' for undergraduates to make them more effective learning tools? [note without infringing copyright]

- Is there more than one set of learning outcomes?
- Could this narrative be used to explore the situation from other perspectives/subject disciplines?
- What are the hallmarks of a good undergraduate case?
- Which particular types of cases have proven successful with these undergraduates and why?

C. THE CASE, THE LEARNER AND THE COURSE PROGRAMME

10. How does the case fit in with the current course programme?

- Am I sure the learning objectives of this case match the teaching and learning objectives of this session/course/unit/programme?
- If not, what do I need to do to achieve closer alignment?
- Is there scope to link with other units / colleagues on the programme for joint teaching, joint assessment? What is the value in an integrated approach?

11. Does this case fit into a series of cases?

- Are there other cases that could provide a better 'fit' that could be used instead of or to complement the chosen case?
- In what way will teaching with this case contribute to achievement of the teaching and learning objectives of the programme? (subject / skill development, etc)
- How does the teaching of this case fit in with other approaches to teaching and learning in this subject area such as the lecture, workshop or seminar?

12. How should delivery be structured to best achieve the teaching and learning objectives?

- as an introduction to a topic?
- as one of a series in one unit?
- integrated with others across the programme?

13. Is the case to be assessed?

- How will achievement of teaching and learning outcomes be assessed?
- How can student feedback be offered to promote further learning?

14. Who or what is being assessed?

- Individual or Group
- Peer assessed
- Class contribution
- Written work

D. THE LEARNING ENVIRONMENT

15. What is the learning environment?

- What resources are available?
- What are the limitations of the room?
- What electronic resources are available?

16. How I am going to deliver this?

- class discussion?
- alongside taught element in workshop manner?
- role play?
- video recorded presentations ?

17. From which different viewpoints could the case be delivered?

- How does this reflect the students' prior life experiences?
- How can students draw from previous learning to associate with the situation/key characters?

18. How large is my class group?

- How can cases be used effectively in large module groups?
- How do large groups affect different activities throughout the case exercise (eg role play)?

19. What pre-classroom planning is needed for effective undergraduate case use?

- How much time is available?
- How can I break down the different 'visiting points' into allotted time limits?

20. What part (if any) do the students play in the establishment of the environment?

- Choice of cases?
- What role/perspective will the student be asked to take?
- What difficulties are posed by the undergraduate classroom culture?

21. What do I need to do to improve the learning environment?

- change desk layout / seating arrangements?
- book other equipment ?
- discuss with colleagues to have a more integrated approach?
- make clear expectations to students in terms of contribution / preparation / awareness of assessment methodology?

E. CASE RESOURCES & ENHANCING THE LEARNING PROCESS

22. What further resources are available that might enhance the learning experience?
- How can these strengthen the link to academic theory?
 - Can guided reading be offered?
 - Links to on-line learning resources?
 - In what capacity could the students be considered to be a 'case resource'?
 - What would be included in the 'education contract' that you might draw up with your undergraduates?
23. How can new case material be developed for undergraduates?
- From where could new materials be sourced for undergraduate cases?
 - To what level can students be case writers for future teaching cases?
24. What other creative initiatives can be taken to enhance the learning process?
- guest speakers?
 - company visits?
 - product examples?
 - promotional literature?
25. How can I build in some reflection to deepen the learning experience?
- reflection on decision taken?
 - reflection on learning process?
 - reflection on individual performance?
 - What feedback should I give to students to promote this?

References

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About the Authors

Scott Andrews and Trevor Williamson are regular users of the case method. Their work with cases incorporates case writing, case teaching and case training. They have run many training workshops on how to use cases with professors and academics from management schools across the world as part of a training programme run by ecch (formerly the European Case Clearing House).

Scott is based at Cardiff University and he tutors on a number of undergraduate courses which regularly incorporate case use. He is also an Associate Lecturer at the Open University Business School. Scott primarily lectures in Marketing and Management Strategy. Trevor is a Principal Lecturer and Co-ordinator of Post-Graduate Admissions at Manchester Metropolitan University's Business School where he directs a number of programmes primarily in Finance and Risk Management to both undergraduates and postgraduates..