



Workshop on Developments in the Case Study Method for Entrepreneurship Education METU/ODTU, Ankara, Turkey

17-19th June 2019

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This workshop is supported by the TUBITAK 2223D program.

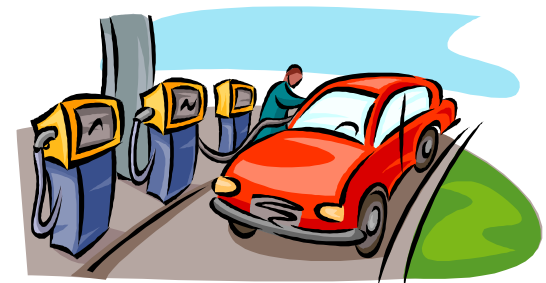
The Case Method



Student discussion of a planned sequence of cases, drawn from actual situations, with responsibility for analysis and conclusions about issues within the case resting with the students.

The case “teacher’s” role is seen as one of guiding student discussion, rather than providing answers.

The focus is on student learning through their own joint efforts.



Value of the case method?



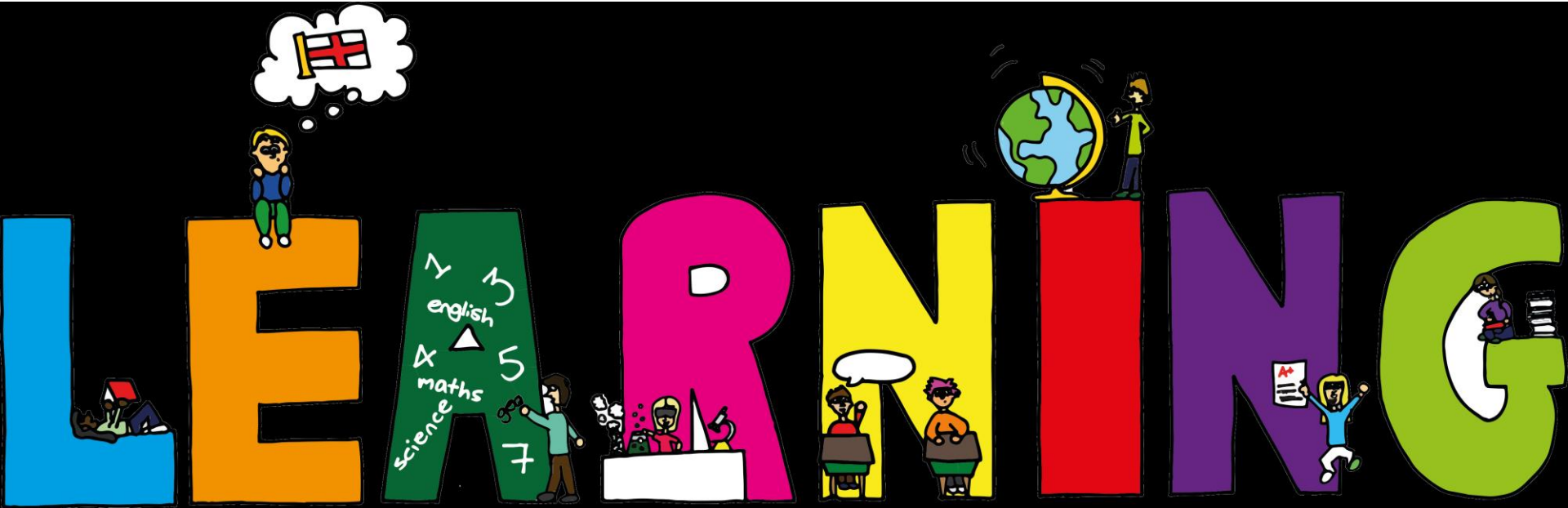
**Talk to me and
I will listen**

**Show me and
I will observe**

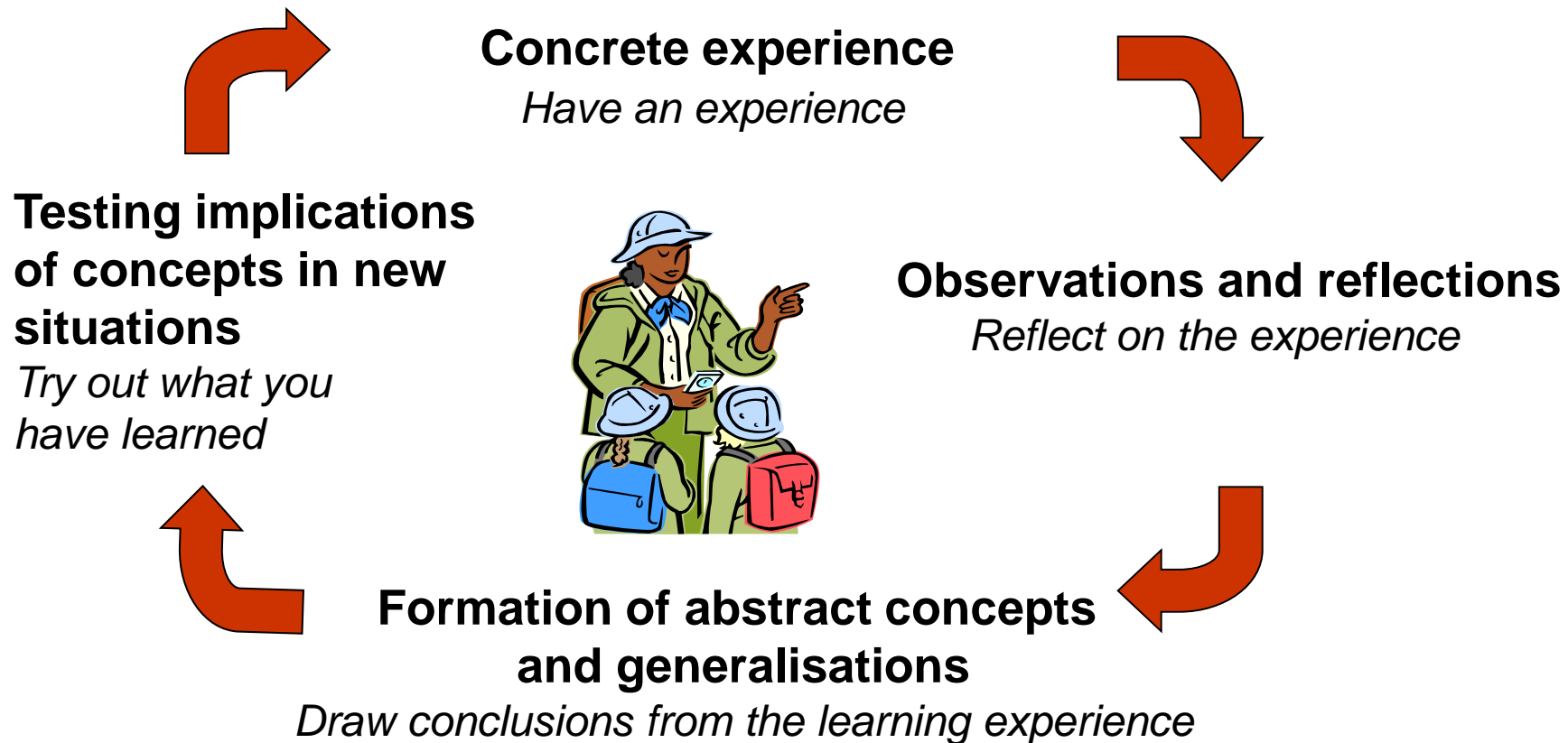
**Involve me and
I will learn**



LEARNING



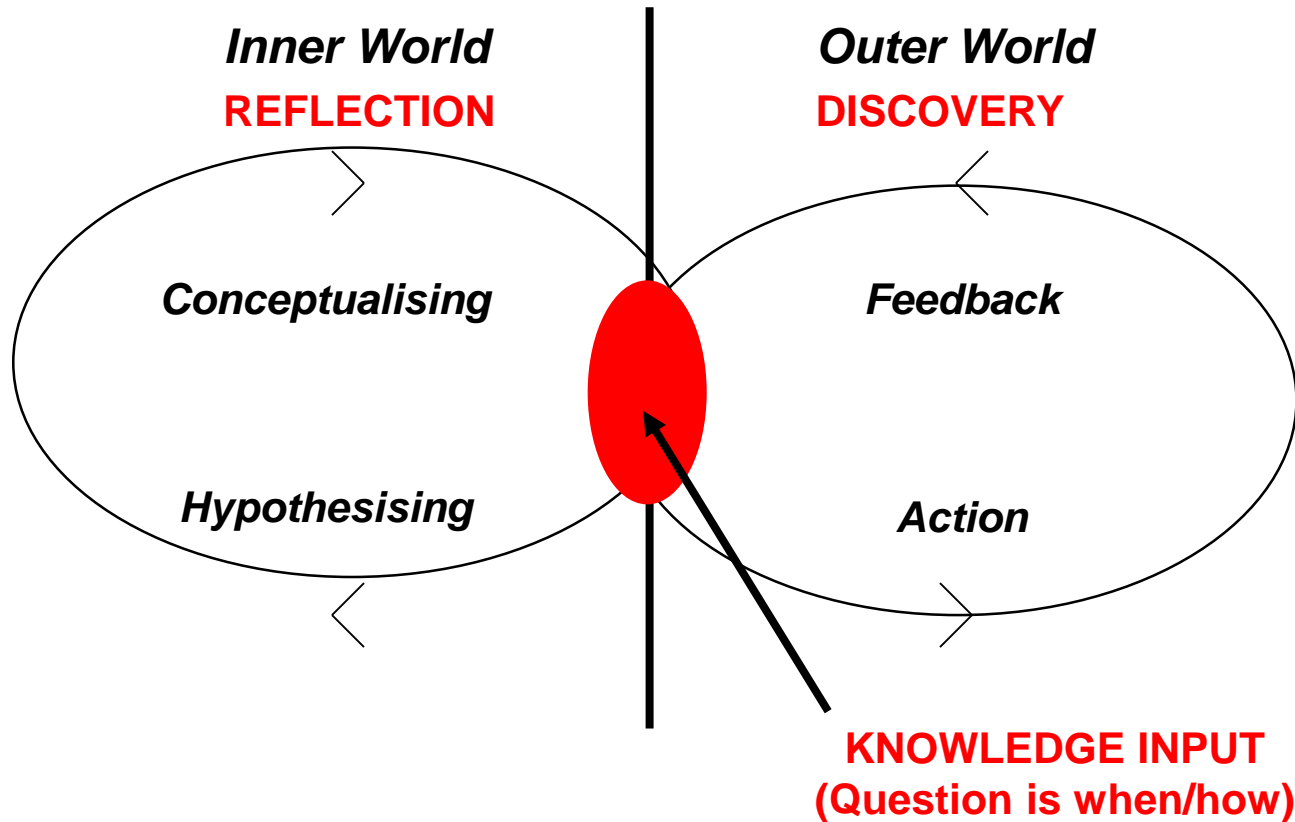
Experiential learning model



The importance of reflection in the learning process



Lancaster Model of Learning



Learning modes (alternative learning loops)



Input-discovery-reflection

“ Here is some data and a procedure. Apply the procedure to the data and come back with some conclusions. ”

Input - reflection – discovery

“ Here is a theory. Let us think about how it might help us to develop a better understanding of what is happening in this situation and the circumstances in which it can be applied elsewhere. Then let us test it in another situation and discover its value in practice. ”

adapted from J.Heath (1998)



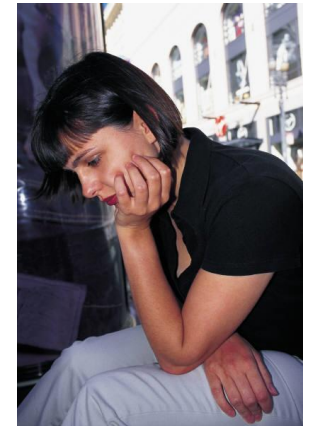
Discovery-reflection-input

“Experience this activity. Then come together and we’ll discuss what is happening and why. Then I’ll tell you what researchers have found out about it.”

Reflection



..is a form of mental processing – like a form of thinking – that we use to fulfil a purpose or to achieve some anticipated outcome. It is applied to **relatively complicated or unstructured ideas for which there is not an obvious solution** and is largely based on the further processing of knowledge and understanding and **possibly emotions** that we already possess.



One of the defining characteristics of **surface learning** is that it **does not involve reflection**.

Tasks that encourage reflection



- Ill-structured, 'messy' or real-life situations
- Tasks that challenge learners to integrate new learning into previous learning
- Tasks that demand the ordering of thoughts
- Tasks that require evaluation
- Posing the right kinds of questions
 - those with no clear-cut answers



Opportunities for reflection



Preparation

Experience

Reflection

**Reflection before
the experience**

**Reflection
in action**

**Reflection after
the experience**

**Individual analysis
Discussion in groups
Written analysis**

**Class discussion
Quick re-evaluation
Contribution in
discussion**

**Review of original
analysis
Consideration of
own blind-spots
Identification of
applications and
connections**

What do we mean by learning?



If at the end of the session students..

- **know something** they did not know before, or
- **can do something** (or do it better) than they could before, or
- **have formed a view about something** that they did not hold before

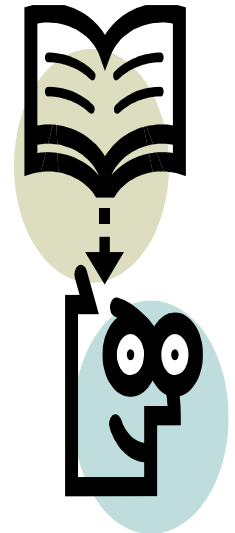
then they have learned

Can use of the case method promote learning?



“ Where truth is relative, where reality is probabilistic and where structural relationships are contingent, teaching and learning are more effectively accomplished through discussion.

With intrinsically complex phenomena, little of value can be communicated directly from teacher to student. The learning process must emphasize the development of understanding, judgment and even intuition.”



Thomas Clough - seminar participant,
quoted in Barnes L.B., Christensen C.R.,
Hansen A.J. (1984)

Critical considerations



- Who is to do the learning
- What is to be learned
- How is it to be learned
- Where and under what circumstances is the learning to take place



Beliefs about how we learn



- We only learn what we are interested in learning
- Learning depends on wanting to learn
- We learn best when we are free to create our own response to a situation
- Learning depends on not knowing the answers
- We all learn in our own way
- Learning is largely an emotional experience
- To learn is to change



adapted from J.Heath (1998)

The case method is not the panacea to all
teaching and learning problems



**Specific
learning
objectives**

**Resources
available**

**Institutional
climate / strategy / policies**



**Student
characteristics
& perceptions**

**Staff skills
perceptions,
preferences**

What is a case study?



A case study (or a case) is a description of a situation, or an account of a sequence of events, which raises issues for discussion and/or problems for analysis and solution.



adapted from J.Heath (1998)

What are the features of a “good” case?



A good case is one that

What makes a good case? (IMD)



- It fulfils **pedagogic objectives**
- Tackles a relevant important issue
- Has a personal touch
- Provides currently useful generalisations
- Contains contrasts and comparisons
- Has the data required to tackle the problem, but not too much
- Is controversial
- Is short
- Is well structured and easy to read



Writing Good Cases (RSM, Rotterdam)



- A case, not just a story
- Situation-specific, fresh topic
- Relevant, important issue
- Objective, in perspective
- Broad enough to allow generalization
- Specific enough to allow thorough exploration
- Personal touch
- Contrasts, tensions, controversy, or other dramatic elements
- Layers (immediate & root issues)
- Well structured and easy to read

Other values of the case method



- Provides a context within which to explore ideas, identify relationships, test theories, formulate hypotheses.
- Enables students to perceive their field of studies in a broader context.
- Facilitates deep, rather than surface learning.
- Develops higher level skills of synthesis, analysis, evaluation, judgement, problem solving, communication.
- Develops inter-personal skills, team-working.
- Increases involvement and motivation
– a more enjoyable learning experience.



Most popular global cases....



- Cases with a simple and clear focus
- A hot topic with broad relevance
- Shorter cases (10 pages or fewer)
- Cases about emerging economies
- Cases with teaching notes that also have concrete assignment questions or exercises
- Role plays and exercises (instructions have to be very clear)

What makes a good case teaching and learning environment?

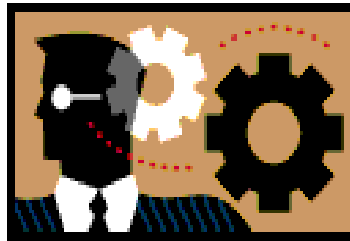


The main challenges that I face when trying to teach / promote learning through the use of the case method are

For effective use of the case method...



“a teacher requires not only knowledge of subject matter, but knowledge of how students learn and how to transform them into active learners.



Good teaching, then, requires a commitment to systematic understanding of learning”.

Selection of cases

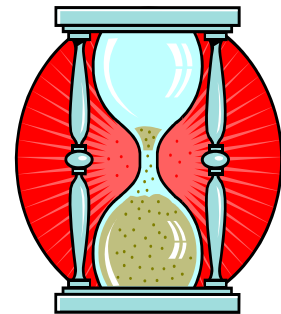


Helps if:

- Local or case or household name
- Topical issue
- Recent case
- Student empathy with decision maker
- Clear trigger points for action
- Tight time pressure

For you:

A good teaching note!



Case studies can provide practise in:



- Analysis and critical thinking
- Decision making
- Judging between courses of action
- Handling assumptions and inferences
- Presenting a point of view
- Listening to and understanding others
- Relating theory to practice



adapted from J.Heath (1998)

Roles of the Instructor



- Manager of group learning
- Good listener
- Stimulator of student interest
- Discussion leader / director
- Empowerer of students (an equal?)
- Developer of critical learning points
- Specialist knowledge provider



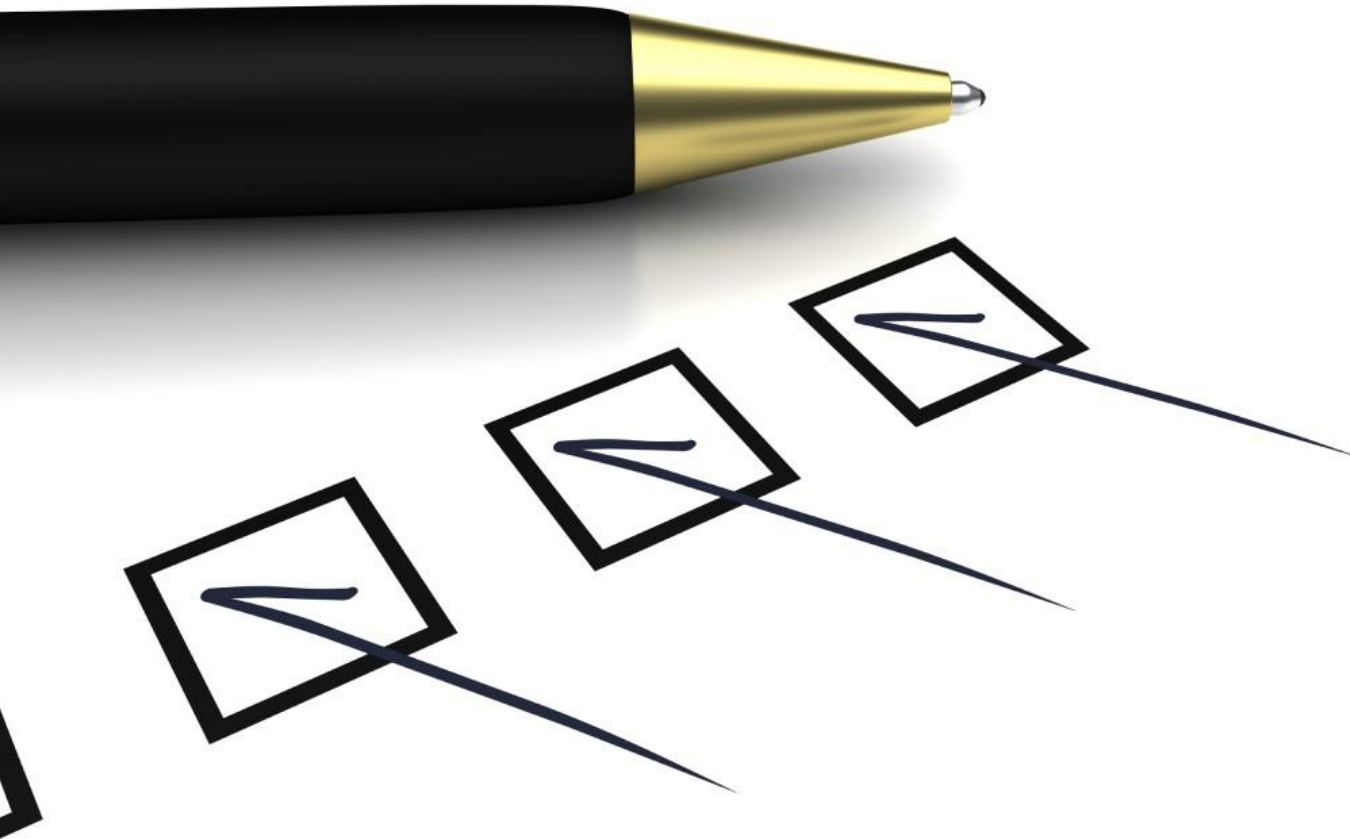
Roles of the Instructor cont.



- Timekeeper
- Recorder of discussions
- Summariser of group discussion
- Establisher of group consensus
- And, very importantly, someone who shows enthusiasm, has a sense of humour, is approachable, articulate, inspiring.



CASE PREPARATION CHECKLIST



Course planning



- Profile of class
- Learning objectives
- Resources / material available
- Selection of material
- Link to theory / other subject areas
- Sequence of sessions / input from others
- Assessment criteria
- Student preparation



Communicating the course plan



- What the course is trying to achieve
- How it will be “taught”
- Performance standards/expectations
- How performance will be measured
- How final mark will be determined



Do's and Don'ts



Do's

- Preparation
- Present the message
- Listen
- Keep open mind
- Previous experience
- Be provocative yet constructive
- Bring in further resources
- Summarise or invite summaries
- Stick to the points
- Evaluate, monitor and review

Don'ts

- Make sudden changes
- Be Repetitive
- Time waste
- Be unfair

Always

- Respect your participants – their background, behaviour & dignity
- Smile

Case teaching plan



- Specify principal teaching and learning objectives
- Say how students should prepare for the session
- Plan a 60 minute teaching session
 - opening question
 - issues to be explored (learning points)
 - management of the session
 - tactics to bring session to a close
- Follow up action
 - assessment methodology
 - links to curriculum

Pre-study meeting



- Are you here to 'learn' or to be 'taught'?
- Discussing the art of learning
- Explore the Lancaster model
- Invite initial feedback
- Setting the ground rules
- Warm-up case



Case preparation



- Who are the students?
- What is the purpose of the case?
- Master the facts
- Cross reference personal plan to the teaching note
- Does the case have any traps?
- What are the lead questions that will help the class make progress?
- Are there any intermediate issues that must be tackled before we can get to the end?
- What will be the best springboards to provoke thought/controversy?
- At what point and how will it be best to deal with the number crunching?

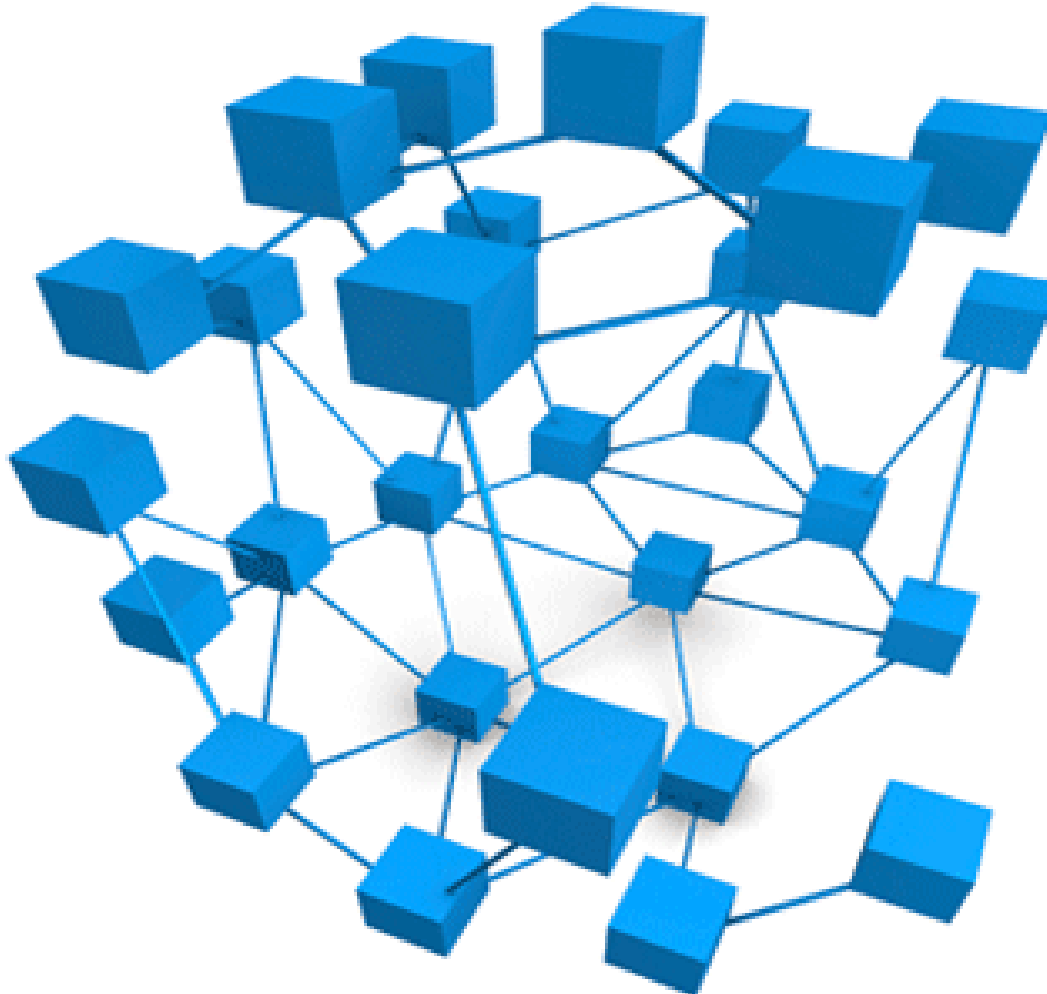




- Knowing the students, what is the likely direction of our discussions?
- What would be the best structure for the discussion?
- How much time is necessary for the various blocks of the discussion?
- How can I connect issues raised to earlier lecture / future topics / other topics?
- Establish clear opening and conclusion to the case discussion?
- Board plan?
 - What main headings should I use?
 - How should I structure the board?



CASE CLASSIFICATION



Case Classification



There are three ways to classify the case:

1. Types of case – content
2. Mode of treatment of the case data
3. Presentational formatting

1. Types of cases



- Incident case
- Background case
- Exercise case
- Situation case
- Complex case
- Decision case



2. Mode of treatment of case data



- Field or Desk Research
- Simple or complex, Long or short
- Single or multiple issue
- Issue raising vs problem solving
vs problem identification vs decision making
- Perspective - level of management
- Inductive or Deductive
- Divergent or Convergent



3. Case Presentational Formats



- As a single case or in bite size pieces?
 - Chicken and egg case
 - Sequential case
 - Envelope case
- Additional materials
- The development of the teaching note/Map
- Media format
 - Paper based
 - Video based
 - Web based
 - Interactive CD-ROM



CASE MAPS



The case map



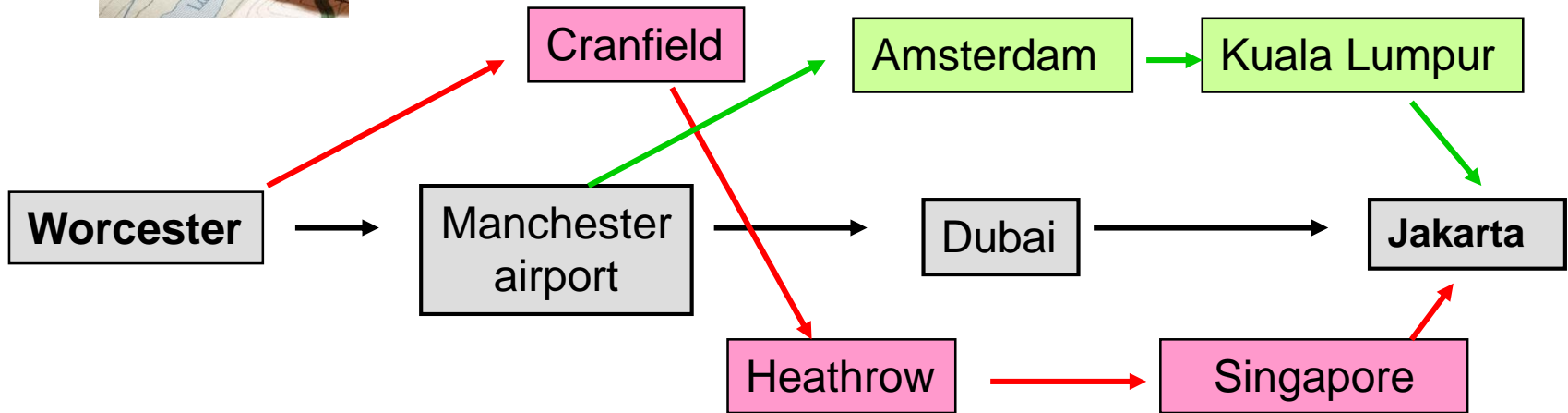
- Provides a framework for a journey
- The starting point – what do the students bring into the classroom
- The destination – key learning objective
- Interesting visiting points (analysis)
- Directions – carefully crafted questions



Components of an effective case teaching session



- Data
- People
- Map





Case teaching plan

Case title: _____ ← **Data - Map - People** → Target learner group: _____

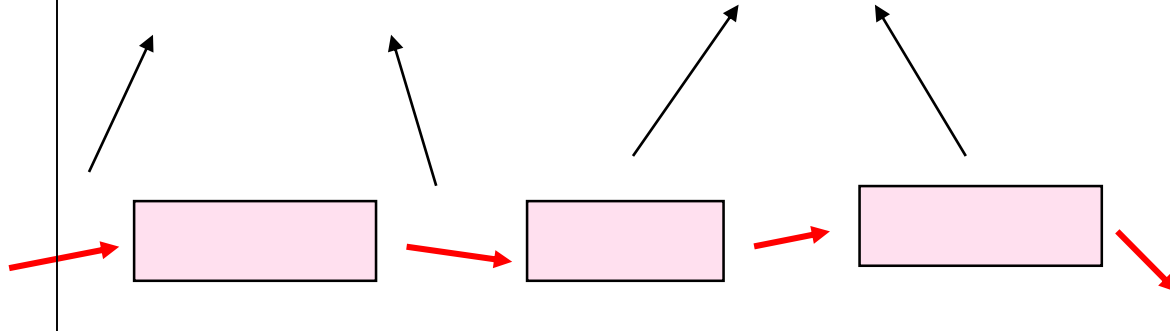
Class prerequisites

Carefully crafted questions – directing

Interesting visiting points – analysis

Key learning objectives

Starting point



Destination point

Orientation and mode of treatment of the case _____

CLASS DISCUSSIONS



Case teaching



Guiding a process of discovery with:

- Well crafted questions
- Sensitive learning
- Constructive responses



Adapted from J Heath (1998)

Theories of teaching



- **Transfer theory**
lectures, reading lists, duplicated notes
- **Shaping theory**
laboratory, workshop, practical instructions (recipes), exercises
- **Travelling theory**
experimental methods, simulations, exercises with unpredictable outcomes, discussion, independent learning
- **Growing theory**
as for travelling theory but less structures - more spontaneous

adapted from J.Heath (1998)

Directive vs non-directive styles



	More directive	More non-directive
Pedagogical objective	to illustrate a concept	to encourage students to develop their own concepts
Nature of the case	unstructured	clearly structured
Timing in the course	at the start	later-on
Student preparation	not very high	good
Students' experience	inexperienced	advanced or experienced

Leading case discussions



Question

- What is the problem here?
- **How do you feel about..?**
- What do you notice about?
- **What other examples are there?**
- What might be done to?
- **What else might be done?**
- Would you do that?
- **What would be the 'cost'?**
- What would you do?

Orientation

- Problem identification
- Attitude/opinion eliciting
- Attention drawing
- Thought provoking
- Problem solving/reducing
- Generation of alternatives
- Personal preferences
- Proposal evaluation
- Identification

Adapted from J Heath (1998)

Testing analytical support for contribution



Could you explain the reasoning behind your idea?

What evidence did you use to determine that?

Is there data to support’s idea?

Could you tell us what assumptions you made to proceed with your analysis?

Can you see anything we have left out?

I’m interested in knowing how you determined that?

Clarifying contributions



Let's make sure we understand what you are saying...

then restate the essence of what the student said

Are you saying that...?

Could we say that...?

Is this the essence of what you are saying...?

then reword and restate what the student said

Evaluating the case



- Wrapping it up:
 - “How else could we approach this?”
 - “What else could we explore?”
 - “On a single sheet of paper....”
 - “On a rating scale....”
- Written response submitted
- Tutor feedback to response (annotating)

Feedback - giving & receiving

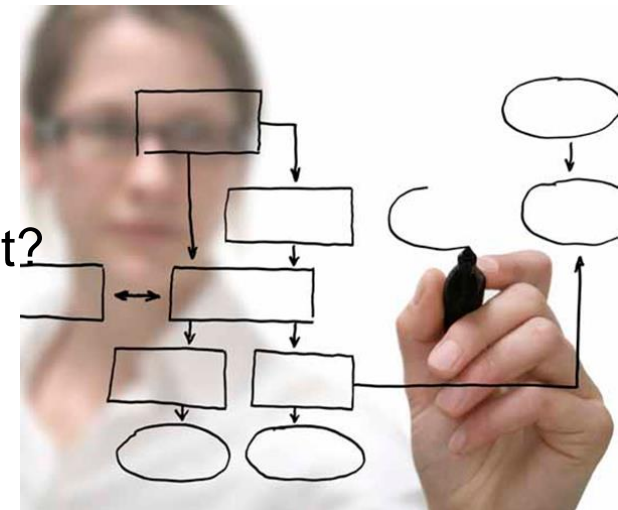


- Before, during and after the case study
- Offering a choice of cases
- Through questionnaire/survey
- E-mail discussion groups
- What are you evaluating?
- How helpful is the feedback?

Evaluating the class session



- Were students motivated? Willing to contribute?
 - Was the atmosphere conducive to learning?
 - Did students feel free to speak/volunteer ideas?
-
- Were you/they well prepared?
 - Were the learning objectives achieved?
 - Was it as good a case as you first thought?
 - Was the session enjoyable?
 - How could it be improved for next time?



Using different audiences



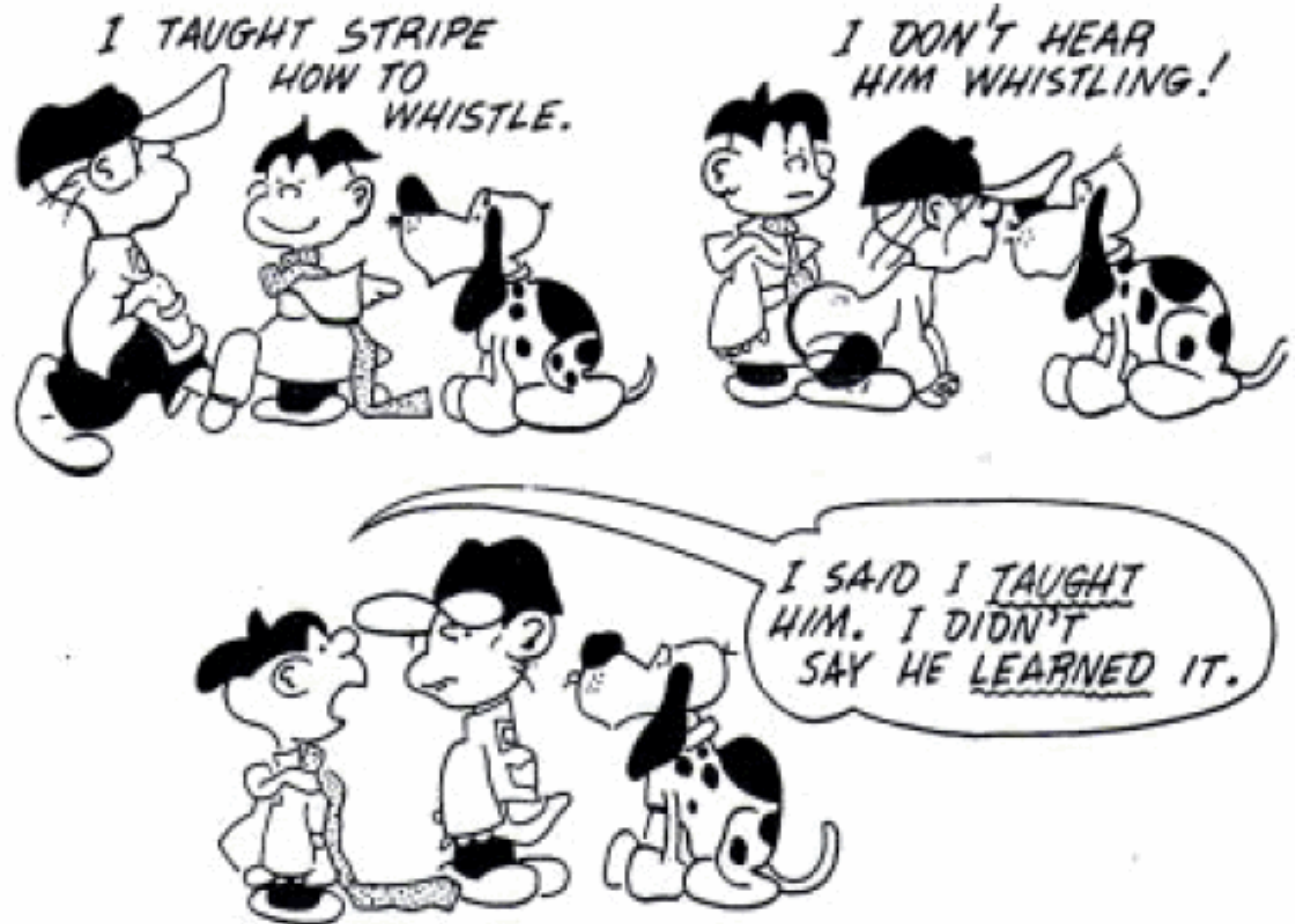
- How big is the group
- Purpose of the case
- Can the group be more effective if segmented?
 - If so how?
 - Role play
 - Sequence “multi-part” cases
 - Multi-role cases
 - Role of a second ‘observer’
 - Feedback presentations

Problem shooting



- How many right answers?
- Ambiguous information
- Non-stated issues
- Irrelevant information/red herrings
- No solution is reached
- Note taking
- Time consumption
- Getting everyone involved

CASE ASSESSMENTS



(Source unknown.)

Cases for assessment



- Learning objectives
- Type of case
- Size / format
- Contribution to learning
- How to assess?
 - verbal contribution
 - written contribution
- Feedback

Use for examinations:

- Size
- To preview or not?
- Expectation of the student
- Marking:
 - what to mark? how to mark?
 - the contribution to learning
 - feedback

Assessment criteria



	Criterion
Process	Prioritisation
	Knowledge
	Numerical skills
Presentation	Structure
	Business communication
	Format
Overall	Business awareness
	Breadth
	Depth

Class contribution



“punish”



“reward”

reluctance to contribute
restating the case
general statements
verbosity
paralysis through analysis
off-the-point comments
taking oneself too seriously

initial efforts to break the ice
positive / creative thinking
insightful comments
persuasiveness / sharpness
mental agility / risk taking
balancing intuition and analysis
humility / sensitivity towards
others

Class participation/evaluation



QUALITY QUANTITY	LOW	HIGH
LOW	1	3
HIGH	2	4

No contribution = 0

Peer assessment



Student name	Trevor	Hazel	Gemma	Scott	Marks allocated
Trevor		120	120	60	300
Hazel	100		100	100	300
Gemma	120	100		80	300
Scott	120	100	80		300
Individual total	340	320	300	240	Group mark
Individual mark	$(340/300 \times 60)$ 68	64	60	48	60%

Obstacles to case teaching

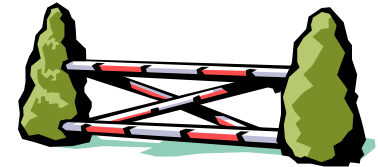


Institution related

- attitudes towards case teaching
- other demands on lecturers' time
- resource constraints

Instructor related

- different skills requirement
- afraid of losing control
- not properly prepared
- co-ordination with others



Student related

- attitudes towards case teaching
- numbers/experience/diversity

Obstacles to case teaching

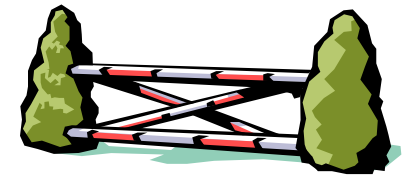


Case related

- long, old largely descriptive
- “irrelevant” cases

Facilities related

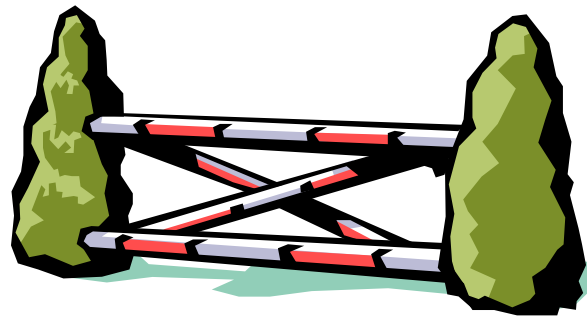
- shape of classroom
- seating arrangements
- timetabling/room availability



Student related

- subject matter too technical
not judgemental/managerial

Obstacles to case teaching at...



The main obstacle to using cases at my institution is

.....

CASE TEACHING NOTES



Bestselling cases in 2017

Discover the key figures behind the cases that sold the most copies in 2017

Authors & schools

278



Authors

from

35



Schools

in

11



Countries

Most featured author
Debapratim Purkayastha



Most featured school
Harvard Business School



Most featured companies



The cases

93%

with a
teaching note

Publication date



47%

with a
translation

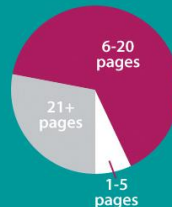
Data source



20%

with
video/software

Length



Featured industries



Find out more

See full details of the bestselling cases, and discover more about previous bestsellers:

www.thecasecentre.org/bestsellingcases2017

	SCHOOL	TITLE OF CASE	DISCIPLINE	NO. PAGES	FIELD DESK	TN?
1	HBS	WOLFGANG KELLER AT KONIGSBRAU-TAK (A)	Human Resource Management / Organisational Behaviour	18	Field research	Y
2	HBS	COLA WARS CONTINUE: COKE AND PEPSI IN 2010	Strategy and General Management	22	Published sources	Y
3	University of California of LA	ZARA: STAYING FAST AND FRESH	Production and Operations Management	20	Field research	Y
4	HEC Paris	MICHELIN FLEET SOLUTIONS: FROM SELLING TIRES TO SELLING KILOMETERS	Marketing	15	Field research	Y
5	Georgetown Uni, Uni of Bath, Universidad de Sevilla	ZARA: THE WORLD'S LARGEST FASHION RETAILER	Production and Operations Management	18	Field research	Y
6	IBS Center for Management Research	NETFLIX: LEVERAGING BIG DATA TO PREDICT ENTERTAINMENT HITS	Knowledge Information and Communication Systems Management	19	Published sources	Y
7	London Business School	RED BULL: THE ANTI-BRAND BRAND	Marketing	14	Published sources	Y
8	INSEAD	THE EVOLUTION OF THE CIRCUS INDUSTRY (A)	Strategy and General Management	6	Field research	Y
9	Harvard	CITIBANK : PERFORMANCE EVALUATION	Finance/Accounting and control	9	Field research	Y
10	INSEAD	RICARDO SEMLER: A REVOLUTIONARY MODEL OF LEADERSHIP	Human Resource Management / Organisational Behaviour	13	Field research	Y

The case teaching note



- Summary of the case
- Teaching objectives and target audience
- Teaching approach and strategy
- Analysis
- Additional readings or references
- Feedback
- What happened next



Teaching approach and strategy



- Detail the settings in which the case has been / is most likely to be an effective learning tool
- Suggest approaches to ‘teaching’ the case
 - Student preparation requirement / questions to be addressed
 - Approach to be adopted - classroom discussion / role play?
 - Suggested flows of discussion / debating points
 - Suggested openings
 - Recommendations on making transitions in the discussion
 - Ways to close the discussion / capture key learning points
 - Assessment methodologies / assignment questions
 - How to consolidate the learning

Analysis



- Identify and present the central case problem or issues to be dealt with in the analysis
- “Do the work” on the case content - both quantitative and qualitative - that might surface in the discussion
- Indicate techniques to be used in the analysis/offer comprehensive answers to questions posed
- Suggest organising rubrics for emergent discussion data that structure and highlight pedagogically important discussion areas
- Point out key areas of analytical conflict



Additional readings or references



- Suggest additional readings / sources of other learning support material to be used in conjunction with the case
- Specific readings can be assigned from a list provided
- Provide useful web links



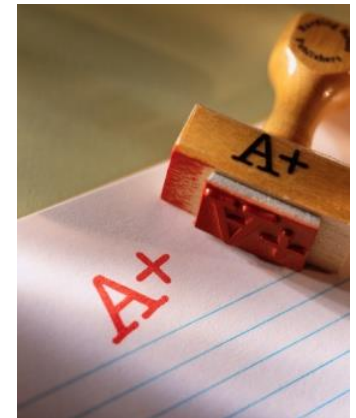
Feedback



- Indication of how the case worked with different student groups
- Indicate the case suitability for written assessment or examination

What happened next?

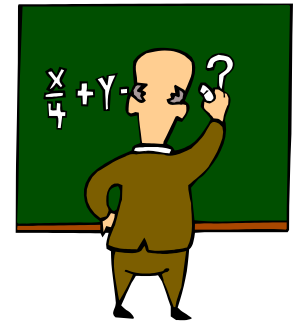
- Where known, present the actual outcome of the case situation and some follow-up facts



Exhibits



- To present complex (especially numerical) data clearly
- To present spatial relationships (organisational charts, process relationships)
- Suggested board plan
- Prepare exhibits as transparency masters



TN - additional functions



- New perspective on case
- Discussion notes
- Assignment questions
- Teaching questions
- Time span
- What happened next....
- Background materials/slides



Teaching notes – Look at your sample case(s)



How helpful were the case teaching notes?

Which sections were most helpful?



What are the main tips that you have picked up by reading and discussing these teaching notes?

What else would you have liked to see to improve the helpfulness of the teaching notes?

Developing the case study



1. Data collection
 - need specific vs trawling

2. Data restructuring
 - deciding structures
 - writing and editing the case

3. Case enhancement
 - a) supplementary material
 - b) Teaching note

Adapted from J Heath (1998)

Sources of case data



- **Armchair cases**
Based on the writer's own experience
- **Desk research**
Based on company reports, newspaper or magazine articles, television programmes
- **Field research**
Based on interviews and/or observations in the host organisation



Case writing according to McNair



- **Create interest** and

“a willing suspension of disbelief”

- **Case structure**
 - Time structure
 - Narrative structure
 - Plot structure
 - Expository structure



Time structure



- *chronology, historical sequence*

- Make it clear when case events occurred.
- Avoid the present tense (unless in reported speech).
- Avoid words such as *this year, currently, recently*. Use actual dates instead.

Source: Heath (1998)

Narrative structure



- the flow of events in an unfolding story

The first task in writing a case is to tell a story, to present an interesting and readable account of the events and circumstances of the case situation.

Source: Heath (1998)

Telling stories



- Stories matter. They are where we lose ourselves in order to risk other possibilities, where we can escape and play, or confront and confess.
- We do not listen to stories; we join in.
- And in accompanying the players of that story we meet many sides of ourselves that we can take back to our lives when the playing is over.
- But good stories need to be told well if they are to envelop us. Flair, humour, truth and insight are all tools that must be well honoured.



Source: Stephen Clark, A very big gig, Sunday Telegraph, 17/11/96

Expository structure



- disclosing, unearthing and communication of information

- Provide opportunities for discovery.
- Decide how explicit you need to be for the target reader group.
- Do not over-estimate the reader's knowledge.
- Do not under-estimate the reader's intelligence.

Source: Heath (1998)

Plot structure



***- the clash of people and ideas
the elements of drama within a case***

There is usually a central theme or issue - the main storyline or plot - together with a number of subplots that have some kind of impact on one another.

These typically concern the actions and motivations of the “actors” in the case situation.

Source: Heath (1998)

Writing the case



Suggestions:

- keep the case writer out of the case
- opinions may be more important than facts
- check all verbs and adjectives for the impression they convey



Consider:

- choice of words
- sentence length
- use of quotations
- change of pace
- degree of repetition
- means of representing data
- Internal consistency
- emphasis

Adapted from: Heath (1998)

The written case - the classic form



In the first paragraph you make a statement about the issue which must be decided in the company.

In the second paragraph you give a little background about the company and its place in the industry.

In the third paragraph you tell how the situation requiring action developed.

Then, as needed material is available, you give additional data about the way management handled earlier events leading up to the issue, and the data from which alternative courses of action might be visualised.

You carefully leave out of the case your own opinions and evaluation.

Case researching & writing



Assuming you are developing a case which incorporates both field and desk based data....

- Identifying the need for the case study
- Identifying appropriate opportunities
- Making first contact with the organisation
- Agreeing parameters for the case research
- Deciding the boundaries of the case study



Case researching & writing cont.



- Undertaking desk research
- Initial field research within organisation
- Writing up the first draft
- Compiling the support material
- Checking draft against original objectives
- Further field and desk research
- Formal release authorisation

Reflections on learning...



What was the most important thing you have learned from this workshop?

What conclusions have you drawn about using the case method for teaching and writing?

What actions will you take as a result of these conclusions?

