

Important Factors of the Case Teaching Method in Management Subjects

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Abstract

The case method packs more experience into every hour of learning than any other instructional approach. That's why it forms the basis of learning in many universities around the world. Case studies provide an immersion experience, bringing students as close as possible to real business situations. Judgment and experience lie at the very core of managerial success. In this article, we discussed in details the factors that business educators need to bear in mind when they apply case discussion in their management subjects teaching.

Keywords

Case Method Teaching.

1. Introduction

Because case teaching is very much a mixture of art and skill, much of the case teacher's development is through trial and error, experience, and a realistic review of past experience. This self-learning, however, can be effectively supplemented by observing other teachers, by being coached, and by discussing approaches and techniques with other devoted instructors.

The core of case teaching is the facilitation of student learning (Liu, 2006). Thus, we will look at the case discussion process from both the instructor's and student's points of view. But we begin by setting reasonable expectations for classroom performance and setting a general group of objectives for student development.

2. Expectations and Objectives

There is no single approach to case teaching. Instead, there are a wide variety of approaches that work for different people in different situations. Thus, the first factor is: Do not strive or expect to simulate another teacher's style or approach. You should, instead, develop a style that is comfortable for you. If it is not, you will not be effective. Facade does not work in the discussion classroom and has no place there. With enough devotion, concentration, and hard work, almost anyone can become an effective case teacher. Certainly a lively class is not necessarily a good one, although it is hard to believe that a boring class could hold the attention of the students and encourage them to prepare with vigor for the next one. That leads us to the second factor: Have reasonable expectations for each class, and understand that some will be better than others. This in no way should detract from the constant striving to improve your performance in each class and to contribute more effectively to the students' achievement of their objectives.

3. The Relationship and the Contract

Case discussions depend upon the active, effective participation of the students. The student must get involved and take a great deal of—in fact, the primary—responsibility for his or her learning. Thus, the relationship between the student and the teacher is vital to the operation of the case class. The more explicit the contract is, the more clearly each party can understand his or her responsibilities and rights. Probably the most important descriptor of the contract is that it be professional—that is, that each party behaves and expects the other to behave with dedication, responsibility, integrity, and a commitment to excellence. Thus, it leads to the third factor: Establish an explicit contract with the

students by showing your expectations about their performance and yours early in the course. If this is the students' first case course, it is useful to make the contract explicit in the second session, after they have participated in one class discussion. If not, the first class session is the ideal time to begin. On the students' side, it is necessary that each be committed to the "4 Ps" of student involvement in case discussions:

1 Preparation. If the student does not read and analyze the case, and then formulate an action plan, the case discussion will mean little.

2 Presence. If the student is not present, she or he cannot learn and, more important, cannot add her or his unique thoughts and insight to the group discussion.

3 Promptness. Students who enter the classroom late disrupt the discussion and deprecate the decorum of the process.

4 Participation. Each student's learning is best facilitated by regular participation. More important, the case student has the responsibility to share his or her understanding and judgment with the class to advance the group's collective skills and knowledge.

The students will, over time, grow to understand the importance of these four elements, but it is the teacher's responsibility to stress very early in the course the importance of student preparation, presence, promptness, and participation. The instructor should clearly set the example in these areas (Wang and Farmer, 2008).

The contract is a two-way street, and the teacher must be willing to more than meet the students' commitment. On the instructor's side, the professional nature of the contract and its surrounding relationship will be shown by (1) careful and complete preparation for the classroom experience, (2) concern for and devotion to the students in all dealings, including those in the classroom and in the office, and (3) striving to make the course a satisfying development experience. By and large, the more the teacher does, the more the students will do. So, show your commitment to the case discussion process by complete preparation of material and concern for student development. Nothing creates student commitment to preparation as well as having the instructor quote from memory case facts such as numbers in the first class. Students will generally prepare up to, but not beyond, the standards of preparation shown by the instructor.

Preparation to teach must include much more than just reading the case and the teaching note. The instructor must go beyond "preparing the case" to preparing to teach the case. Most new case instructors spend a great deal of time analyzing the case and calculating reams of numbers. That work is important and should not be discouraged. But, it is not enough. The instructor must develop a set of specific teaching objectives that reflect the case, class situation, course, and so forth. He or she must also have a clear idea of the general topics and diagrams that might end up on the black board, and of the questions that might be asked to encourage greater depth and focus in the discussion. The instructor must always have more than enough black board ideas and questions so that she or he can fit their use to the classroom situation. Have a complete set of teaching objectives and a copious collection of likely board structures and questions. This brings us to the classroom experience.

4. In Class

The fourth factor of case teaching is this: *Have the students accept and maintain ownership of the discussion.* The discussion must be student driven. If the teacher takes the responsibility for ownership of the class, the students can collectively and individually avoid their responsibility for maintaining the quality of the discussion, and the process will degenerate to the instructor's lecturing about the case.

There are *several approaches* to encouraging the students to take ownership of the class. One is the contract described earlier. Another is: *Avoid making a choice about the case decision, but force each student to do so.* It is useful to state in the course introduction that "the only person who doesn't need to make a decision about the case is me, the instructor." All students should be expected to have a plan

of action for the protagonist in the case to ensure that they maximize their learning and can participate actively and effectively in class.

The instructor should understand that in the discussion process, action drives analysis. That is, if a student has made a decision about what to do, the instructor can always focus on the supporting analysis with a question like “Why would you do that?” or “What evidence supports that approach?” The action orientation ensures that the analysis that is done will be relevant to a decision, not just analysis for its own sake.

If the instructor does not have an answer to the case or a choice of an alternative, how can she or he manage the discussion? *Use themes to manage the discussion. Themes include topics, areas of analysis, and decisions.* The instructor who has a set of themes can manage the class in subtle fashion to ensure that decisions are aired and topics covered. He or she does not have to show the answer. In fact, doing so is counterproductive, because it encourages students to develop answers that meet the teacher’s views, rather than approaches that fit the case situation or the student’s skills and abilities. Because implementation is so important, each student must develop approaches and answers that fit her or his talents and judgments.

Use questions to manage the trade-off between depth and breadth, and to heighten conflict. Most cases have too much material to cover in one class session, so the teacher must make choices between depth and breadth. The essence of case discussion is the airing of conflict between two or more opposing views (Kay and LeSage, 2009). The best discussions include opposing views that are supportable and reasonable. One of the instructor’s tasks is to clarify and heighten conflicts. The clarification and heightening provide a richness and excitement to the discussion. Students should be encouraged to openly and honestly consider differences of opinion.

Listen. If student ownership of the discussion is important, the role of the instructor as listener is perhaps the most critical element in establishing that ownership (Kim et al., 2006). The instructor should limit his or her own comments during the discussion and be sure to listen hard and carefully to each comment. This encourages the students to listen to each other and to view participation as serious. Most important, the instructor’s listening establishes the primacy of students’ comments in the classroom.

Listening is a part of another important role: *Provide respect and protection to students and their comments.* Respect and protection are an important part of encouraging students to participate and test ideas. Protection, however, does not mean that standards are low and any off-the-wall idea, even one carefully thought out, is accepted and embraced. It does mean that such a comment is not ridiculed but is gently shown to be “full of holes,” preferably by other students’ comments. Part of the development of standards is to manage conflict so that well-considered, carefully conceived comments gain their rightful merit in the discussion.

A reasonably fast pace makes the class more enjoyable and gives the opportunity for greater coverage. *Body language can be used to help pace the class and manage the discussion.* In large classrooms, the teacher’s degree and pace of movement will be reflected to some extent by the pace of the class. It helps to move around the classroom and to stand at different points. Nonverbal gestures can also help manage the discussion. They can, for example, encourage the shy, hesitant student or discourage the student who shouts out comments without being recognized to speak. The teacher’s physical position can also help the students talk to one another (Ryan and Louie, 2007). Standing at the side or back of the classroom so that other students are between the speaker and the teacher helps students talk to one another. A stronger message, which must be used very selectively, is delivered by standing behind the student who is speaking. When the students consistently talk to one another rather than to the teacher, they truly take ownership of the class.

Use summary and “offline” lectures to deliver general comments or important related material. Most case discussions end with the instructor delivering a few (2 to 20) minutes’ worth of general comments that review and highlight the discussion (with attribution to students’ comments), structure the issues, and generalize to other situations. There is no reason for a case discussion not to include

some lecture. But the instructor should not turn it into a lecture about a case. “Offline” lectures during the discussion can be used to clarify related issues (a legal or regulatory subject, for example) or to cover adjunct material.

5. Conclusion

The case method packs more experience into every hour of learning than any other instructional approach. That’s why it forms the basis of learning in many universities around the world. Case studies provide an immersion experience, bringing students as close as possible to real business situations. Judgment and experience lie at the very core of managerial success.

In this article, we discussed in details the factors that business educators need to bear in mind when they apply case discussion in their management subjects teaching. The case discussion process depends on a delicate set of relationships: teacher-to-student, student- to-student, and class-to-material. Once the process becomes established, it can accomplish a great deal. Because of the delicacy and power, it is important to nurture the discussion process even if that means trading off some coverage of a case. The instructor, in all that he or she does and particularly with respect to the relationship between the student and teacher, sets the example for the class. Finally, because the students’ development is so serious and important, and the teacher and classroom experience has such a strong impact, the outstanding instructor must strive for excellence.

Acknowledgements

This research is supported by Shanghai Full English Course Development Fund for Universities and Colleges (Grant No. B.08-0115-13-001) and the National Natural Science Fund of China (Grant No. 71302048).

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