



Teaching with Cases Manual

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1 Introduction

The following sections of this Teaching with Cases Manual provide inputs to support the Case-Study Alliance Turkey, Case Teaching Workshops to help you get started as a case facilitator.

The material contained in this manual complements the material provided in the Case Teaching Workshop and an earlier CAT Project course book entitled: “Case Teaching Coursebook” which can be found at:

<http://ginova.itu.edu.tr/cat/erisilebilir-kaynaklar>

<http://cat.ba.metu.edu.tr/tr/cat-dokumanlari>

This manual builds on earlier content to include types of teaching cases, the teaching plan, teaching with various forms of cases (e.g., multimedia cases), teaching with cases at the undergraduate, graduate, and executive level in Turkey.

2 Types of teaching cases

The first step towards sourcing case materials is to consider the Types of Case Study you may wish to use in your class sessions. In general, cases can be segmented into six different categories or types: the Incident Case, Background Case, Exercise Case, Situation Case, Decision Case and the Complex Case. These are detailed further in the earlier case teaching course book

The Case Centre, based at Cranfield University, hosts the world’s largest collection of all types of management case studies. This collection of over 50,000 cases includes paper-based, video cases, multimedia and online resources; and includes collections from across the world including those of Harvard, Ivey, INSEAD, IMD; as well as collections from India and Indonesia. A full search and order service is available at www.thecasecentre.org

3 The Case Teaching Plan

Whilst the case method promotes the opportunity for participant centred learning, the case tutor is still responsible as the manager of group learning and as such, it is appropriate for the tutor to have a teaching plan in mind as part of the preparation for the class discussion. With high level, advanced learners, it may not be necessary to stick too rigidly to the plan in order for the learning objectives to be developed. In these circumstances a less formal, discursive environments may be preferable. However, for less experienced learners, it is more important to manage the learning process, the pace and the direction of discussion to ensure that the key learning objectives can be reached. When planning a case discussion for a group of Turkish



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students it is important to first consider their prior experiences, their developmental level and their predisposition to participation in a class group-learning environment. Planning the case discussion and learning process requires several considerations:

3.1 Opening and guiding the discussion

Facilitating a case study class discussion is about more than just offering a range of questions for the students to respond to. The case facilitator is responsible for taking the learners on a 'journey' of discovery which may even include a few surprises along the way. Prof Malcolm McNair of Harvard Business School used to use a Shakespearian term to describe this journey, suggesting that learners ought to 'willingly suspend their disbelief' in order to enter into the narrative of the 'story' of the case.

This journey needs to consider both breadth of content and depth of analysis and ought to reflect the developmental level of the learners. Getting started on the journey is a critical opportunity for ensuring buy-in and full engagement from the learners. Typically, tutors may ask an open question for which there is no absolute right or wrong answer. These types of questions are geared to encourage a response from all participants and may include phrases like:

- On a rating scale of 1 to 10.....
- Which of the following options do you think best describes
- On a single sheet of paper write down”

These orientating types of questions enable the participants to immediately enter into the issues raised in the narrative in order to immerse themselves into the journey.

And as the journey begins, remember, you are principally responsible for guiding a process of discovery with:

1. Well-crafted questions
2. Sensitive learning
3. Constructive responses



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3.2 The Case Map

One approach to preparing the student for the class discussion is to develop a map, which the facilitator can then use to assist in guiding the learner through the class discussion 'journey.' The map contains a number of key characteristics:

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



Planning the class session is a crucial part of effective use of the case method. Having selected the case that, you're looking to deliver in the classroom and having considered any additional information provided by the author (often provided through teaching notes), it is now the case facilitators job to plan how to effectively use the time in the classroom to enable but you to support the learners on their journey through the data in the case. In this way, students should be able to proceed towards a destination (which is often referred to as the key learning objective), through a process of analysis, discussion and evaluation; whilst encounter "Interesting visiting points " along the way.

The exhibit at the end of this manual provides a sample template that could be used to help plan such a session. It is important for the case facilitator to be really clear about the purpose of the case and what it contributes to teaching and learning in the classroom. The facilitator should consider how students will be able to undertake the processes of 'discovery' and 'reflection' in order to draw conclusions about issues raised from the data in the case, to achieve specific purposes which might include any of the following:

- 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.



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- 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.

The provision of a set or sequence of questions will provide part of the necessary tools to support the learning process, but the teaching plan needs to go beyond this. The production of a map that allows the case facilitator to plan the journey, should include the following key considerations:

- An understanding of the prerequisites that the students bring with them into the classroom
- A collection of carefully crafted questions to enable opportunities for ‘Analysis’ and examination of the ‘Issues Raised’ in this case data
- Consideration of how theory models, matrices and good management practices from published resources, can inform the students analysis of the issues raised in the case.
- Clearly identified set of learning outcomes and consideration for key interesting visiting points where analysis can take place.

This mapping exercise can subsequently be used to develop new case teaching notes, but in the first instance they are essential for effective classroom planning. So let's look at each of these aspects of the case map in more detail:

Pre-requisites – starting the journey

Every student that comes into the classroom brings with them a ‘secret history’ of prior experiences and knowledge that can contribute to their understanding and sense-making of the issues raised in the case discussion. It is helpful for the case facilitator to capture as much information about the learners as possible prior to starting the class, in this way the facilitator is better placed to adopt purposive teaching approaches to draw from the learners their own perspectives and insights (informed by their secret histories) which can bring new dimensions to the way in which the issues in the case are examined by the class as a whole. A prior knowledge of the students who will be undertaking the case discussion, will also enable the facilitator to prepare an approach to the case, informed by these pre-requisites, to ensure that a journey takes place that best facilitates learning. In this way, the learners ought to hold



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a different position or perspective on the case by the end of the journey to that which they held at the beginning of discussion.

Carefully crafted questions

The way in which questions are formed and shaped is a critical element to the way in which the journey will be undertaken. For example, some questions enable decision-making, whilst others are there to encourage deeper analysis of the situation that is presented in the data. The way in which these questions are worded provides different 'orientations' during the case journey. This is considered further in the next section

It is important to ensure there are a balance of questions which enable analysis and those which enable progress towards the key learning objectives (KLO's). In this way, questions can be used to provide both breadth and depth in the case discussion.

Interesting visiting points

Every journey has the capacity to include 'interesting visiting points,' which are places where the learner might 'linger' in order to explore an issue in greater depth and detail. In the case journey these interesting visiting points are often the places around which analysis can take place. They may include opportunities for the introduction and/or application of management theory; for example, in the undertaking of a SWOT analysis; or they may be used for crunching the numbers as part of the financial evaluation of the case data. These parts of the case discussion may be occasions where students may feel inclined to want to move the conversation forwards, but the challenge for the case facilitator is to ensure the students linger around the issue being explored in order to probe deeper (through analysis) into the issues raised.

Student Orientation and Perspective

Sometimes students can find it difficult to know how to navigate their way through a complex case or a case where the level of management involved is unfamiliar to them. In such circumstances, it is often helpful to provide the students with an entry point into the narrative, by providing them with a particular perspective on the case. This may be as simple as asking them to look at the issues in the case through the eyes of one particular character in the case; or it may be helpful to invite them to imagine they are a consultant being asked to advise one of the stakeholders in the story about a particular aspect of the situation that they are presently facing (as discussed in section 3.4).



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When deciding on viewpoints, it's important to take into account the students own level of development and prior experiences; for example, a student who has only recently left home to participate in an undergraduate degree programme may feel insufficiently experienced to be able to adopt the mindset of a CEO of a major global business. Determining the most reasonable viewpoint or perspective for the student to adopt with the case is a critical factor to promote effective learning

Key Learning Objectives - the destination point

Ultimately the key destination point for the journey is the pursuit of the key learning objectives (KLO's). However, as a case tutor, this is often also the starting point for case planning. The map needs to guide the learners in a certain set of directions in order to pursue a set of learning objectives. It often helps in discussion-planning to determine the KLO's first in order to ensure that the rest of the planning is undertaken with the pursuit of the KLO's in mind (as the destination point). Once this destination point is determined, the directing and orientating-type questions can be developed to help the learners to progress the journey through interesting visiting points and onwards to the destination. The challenge is to ensure that the number of objectives is not so many as to cause confusion leading to an overly complex journey, and not too few as to leave the students with a sense that the journey has failed to derive sufficient meaning. Commonly, tutors develop case maps with 3-4 KLO's for a single class 'journey.'

4 Defining the right questions

The types of questions selected need to be specific in order to determine the direction/orientation of the discussion. For example, some types of question can promote forward movement and others can enable more depth of analysis:

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?

Orientation:

- Problem identification
- Attitude/opinion eliciting
- Attention drawing
- Thought provoking
- Problem solving/reducing
- Generation of alternatives



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- Would you do that? Personal preferences
- What would be the 'cost'? Proposal evaluation
- What would you do? Identification

In summary, a template could be developed using the exhibit at the end of this Manual, to help to determine the nature of the journey for the learners.

5 Teaching with various presentational forms of cases (e.g., multimedia cases)

Traditionally the case was produced as a paper-based narrative, which may be segmented into a range of subsections and which contains tables, graphs and images as exhibits that are normally located at the end of the narrative. Twenty years ago, the average size of the management case study was more than 25 pages, whereas by 2016, the average size had reduced to just 14 pages.

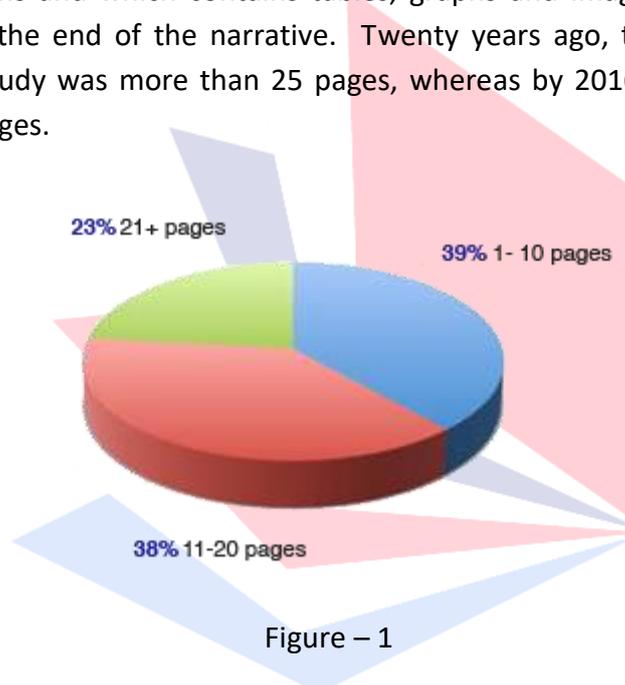


Figure – 1

Source: The Case Centre, UK, 2016

This may, in part, be due to the number of undergraduate learners who are using cases today and for which larger complex data sources may be inappropriate learning resources. It may also be a symptom of a changing socio-cultural mindset, which today finds students able to access a lot of information which is normally contained in smaller bite-sized formats. As such, the case method has evolved and today there are plenty of examples of cases which have been segmented into sequential bite-sized versions of case A, which leads to case B, which leads to case C, etc; as part of the slow unfolding of a larger story. These 'sequential' cases enable learners to access smaller amounts of data for analysis before additional information is provided to widen their perspective on the issues being investigated.



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"Multimedia cases present a wonderful opportunity. They mirror the real world, where so much data can be included and students can engage in a more exploratory way to come up with endless new solutions."

Gregory B Fairchild, Assistant Professor of Business Administration,

Darden Business School

By contrast to these smaller data sets, it has sometimes proven easier to encourage students to investigate larger complex sets of data if their format is electronic rather than paper-based. Hence the evolution of the multimedia case study. Online, web-based and CD-ROM cases have emerged to provide a range of different structural and formatting options for the learners, which enable them to navigate a broad range of approaches (or routes) through a particular case study; whilst having greater command over the navigating of the journey. One case writer once compared this approach to the offering of a buffet, where students are invited to help themselves to different servings of data from different sources, in different formats according to their own particular choices. Another popular metaphor has been to contrast the case journey through the data to that of a journey through a multi-level department store, which has different items for sale on different shelves, in aisles which are arranged in different floors. By offering the learner the freedom to select their own approach through this electronic data, the 'empowered' learner may be more motivated to engage with the text and prepare for a group discussion.

"In recent years, the case method has received special attention and more universal adoption – not just on educational programmes but also on training courses. The development of video technology has given cases a new lease of life and a growing number of 'open learning' packages incorporate a significant level of case studies in video format."

O'Kinneide, 1986

In addition to text, video has emerged as an increasingly popular data source. According to recent research conducted by the Case Centre on global trends, 18% of the top 50 bestselling cases in 2015 had supporting video.

Once, video formats would serve as a supportive exhibit to the case data; but in certain instances, the video has emerged as the primary formatting tool for the case itself. Given the traditional Harvard philosophy of creating a 'slice of reality' in the classroom, it is reasonable to assume that the introduction of video formatting enables the learner to capture a more realistic picture of the issues and characters linked to the case, and in many ways, this can



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bring the case alive to promote greater engagement with the data. For example, it is far easier to empathise with a character in the case if you can see and hear the character explaining the circumstances in his/her own words, rather than just read words on a paper. The inclusion of 'intonation' and 'body language' that comes with video formatting enables a greater alignment and emotional connection to the issues facing the character.

Choosing the right format of case is an important choice for the Turkish Case tutor. Recent research has confirmed that one of the challenges facing the use of cases with students in Turkey, has been the level of motivation and/or engagement with the data. However, whilst certain formatting approaches might foster greater interest and curiosity among Turkish students, it is important to ensure that case selection is based on improving opportunities for *learning* rather than *entertaining*. Whilst it is reasonable to assume that curious and motivated students are more likely to engage with the data and hence to pursue learning, the approach to tutoring with alternative presentational formats, and especially with video cases, needs careful planning too. Remember, the principle philosophy of the case method is participant centred engagement, however, to replace written data with a lengthy video interview may encourage a more *passive* rather than *engaged* response by the learner. One way in which this can be avoided is to ensure that only short lengths of video are captured at any one time with accompanying challenges set for the learners to ensure engagement with the data from each section of the video. Nonetheless, data from the UK-based Case Centre identifies that there has been a growing evolution of video and multimedia cases.

A final thought about non-paper based case study selection relates to IT management. Computer and video formats and platforms are constantly evolving and if students are requiring to use their own resources to access online/CDROM or video material, it is important to ensure the correct IT support is in place to address any configuration issues.

6 Using Cases at the Undergraduate, Graduate, and Executive level

In a recent survey of over 200 Turkish scholars the use of the case method in Turkey across different learner groups is revealed:



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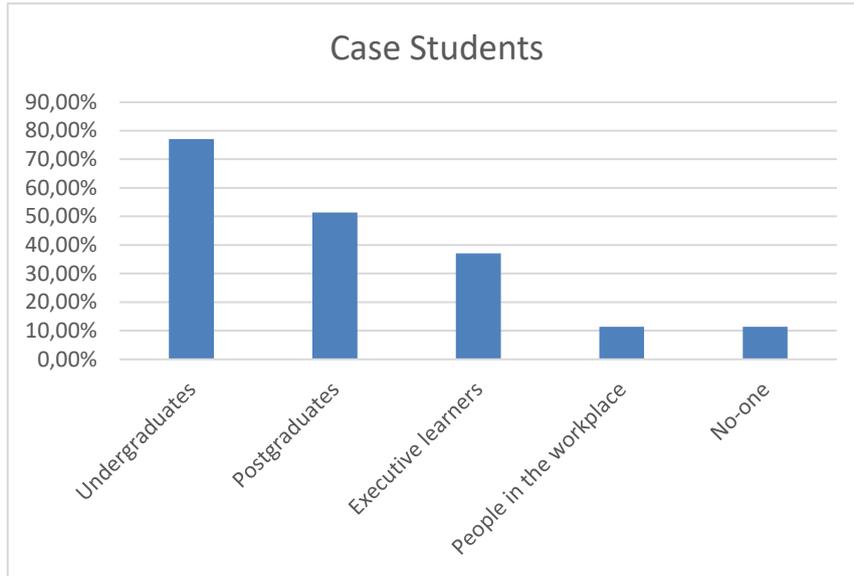


Figure – 2

Traditionally, the case method was developed with the post-graduate (or post-experience learner in mind). Even as recently as 20 years ago, there were many western management centres that were critical of the use of the case method with undergraduates, suggesting that they normally would have insufficient world-experience from which to draw to inform their appraisal of issues in the case.

In a relatively short period of time, the case method has evolved to be a very widely adopted approach for undergraduate management education across the world, supported partly by a change in case formatting and partly by a change in the philosophical approach to case structuring. Traditionally it was held that all the data needed to address the issues in the case could be found in the data contained in the case. In other words, the case was a whole and complete learning package. This resource developed ahead of the evolution of online web-based material. Today, the learner is easily able to access massive data searches which can, when managed sensibly, provide significant support to the analysis of the case. For example, if the case is of a known organisation, the student is able to access the organisation's website, company records, articles written about the company and of comparable companies, or organisations facing comparable issues to those of the case context. As such it is no longer viable to assume that students will only use data from the case itself to address the issues in the case.



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The evolution of shorter cases and sequential cases also enable bite-sized access to an organisation's data, which makes the process more manageable for the less experienced learner.

However, the use of the case method with different learner groups does present challenges and often a need to re-think the approach to the classroom discussion. The onset of the case for the undergraduate student has meant that often younger, less experienced learners are participating in case discussions as part of a much larger class group. It is not unusual to hear of undergraduate case classes that exceed 100 participants, which clearly presents challenges to the tutor in terms of developing genuine engagement and participation within the case journey. In the survey of over 200 Turkish case tutors, it was discovered that the average case class size was 27 learners, with a lowest average group size of 5 and the highest recorded average group size of 60. To accommodate larger undergraduate groups there are three important factors to consider are:

- The pace of the discussion - not going too fast in case you lose people on the way through confusion, and not going too slow as to create opportunities for student distraction.
- The use of break-out/small groups – by inviting larger groups to break into smaller groups of 3-6 members, to address 2-3 questions and then feedback, there is a greater likelihood of all students participating.
- The use of role play – by breaking the group down to assume different roles (or perspectives) of different characters, this enables greater collaborative participation when feeding back to the larger group

The approach adopted to delivering the case sessions should also take into account the developmental level of the learner. For example, executive learners might be very happy to receive a set of cases over a period of time which will be facilitated by a tutor adopting a similar and informal approach to each case, whereas a less experienced undergraduate learner might prefer a more diverse or eclectic mix of different types of cases in different formats, delivered in different styles to maintain interest and motivation.

The level of motivation of the learner will have an impact on the approach that the tutor can take to working with the case data. Often postgraduate and executive learners demonstrate a higher level of motivation, but this does not necessarily mean they are able to provide a greater level of preparation time for the case discussions. Executive learners, who are participating in case classes whilst continuing to conduct themselves in leadership and



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management roles in the workplace, often find excessively long cases to be a difficult resource for class preparation. For example, one case development programme for business directors stipulated that all cases should be no longer than 1-2 pages in length. For these types of learners, case selection needs to take on board, not only their *developmental level* but also their capacity to manage excessive volumes of data as part of the preparation for class discussions.

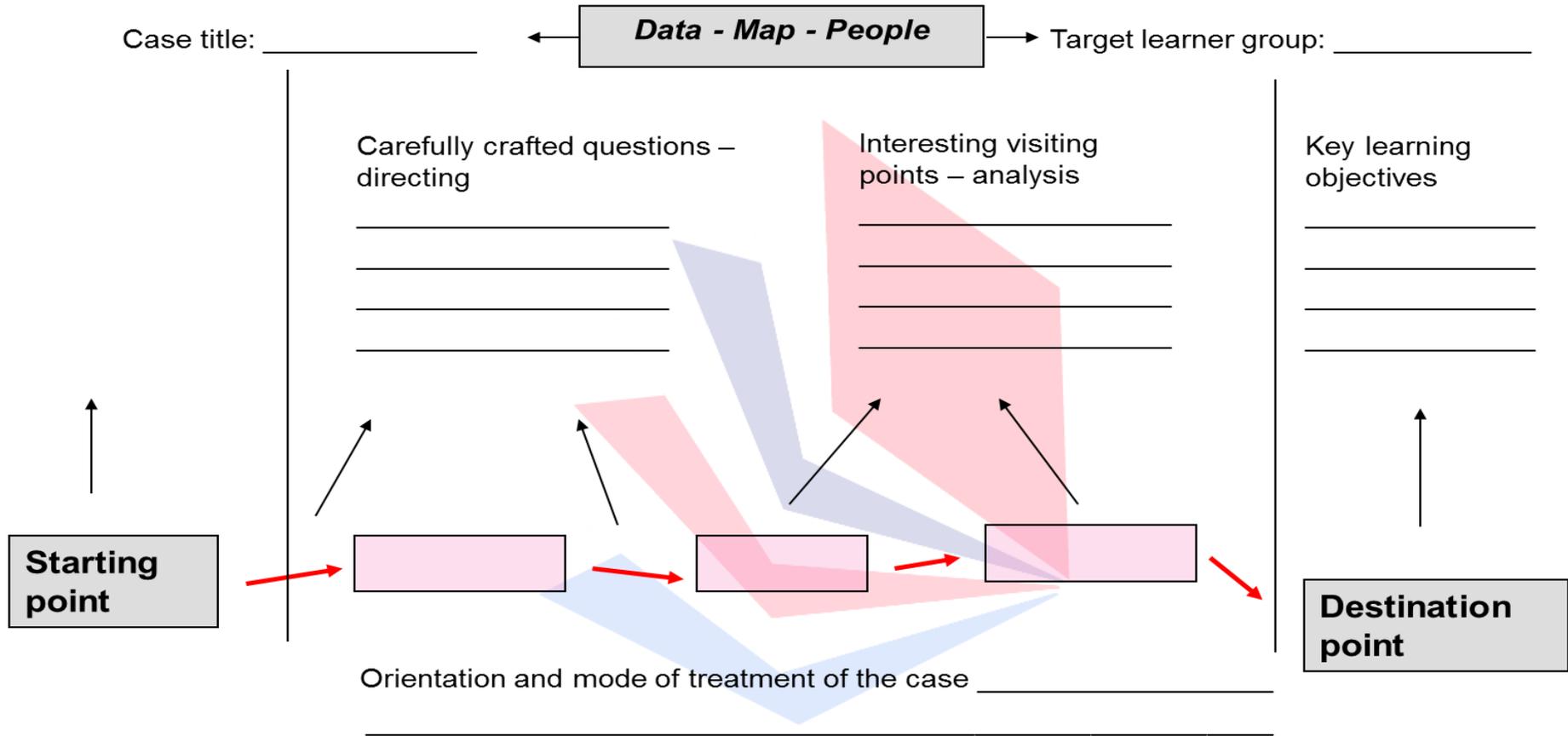
In summary, the number one consideration is to ensure you genuinely KNOW YOUR LEARNER group to ensure you plan with their preferred learning style, developmental level and available time for preparation in mind.



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Case teaching plan



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