Case Teaching Guidelines Book

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Scott Andrews

Nazlı Wasti, Hilal Terzi, B.A.S. Koene, Tao Yue, Deniz Tunçalp, Kutay Güneştepe

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Case Teaching Guidelines Book (CAT-013)
Prepared by Dr Scott Andrews

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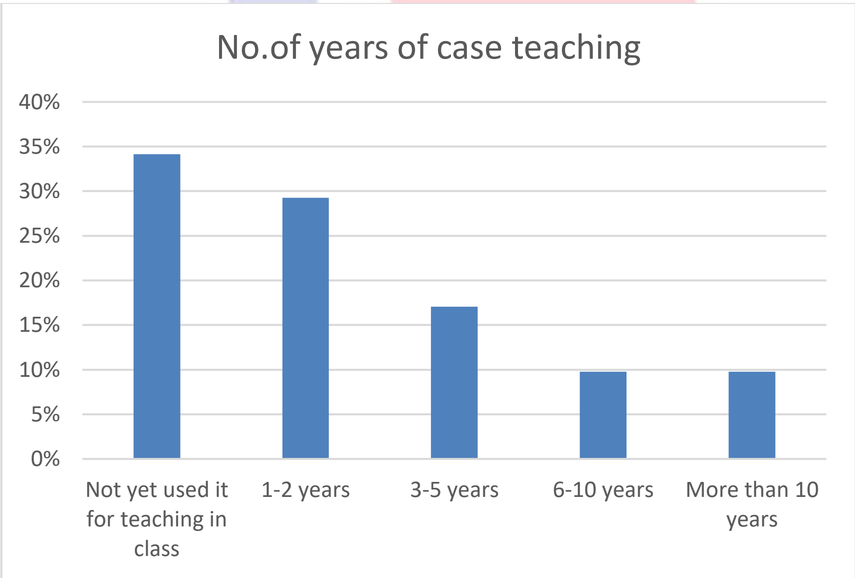
Preface

The following sections of this Case Teaching Guidelines Book provide inputs to support the Case-Study Alliance Turkey (CAT), Case Teaching Workshops. At the end of the book you will find a Quick Reference Guide to help you get started as a case facilitator. The material contained in this book is derived from over 20 years of research into the case study method, incorporating feedback from case facilitators (tutors) from across the world. The Guidelines Book is also informed by recent research conducted among over 200 current facilitators of the case method in management education, from universities and training organisations across Turkey. From this survey, it was revealed that some participants were case writers, but not tutors, and some were yet to start teaching with cases. There was a wide range of experiences of using the case method, as highlighted in the table below:



As such, this Course Book contains a unique insight into the challenges facing Turkish tutors (facilitators and writers) and students (learners) as they explore learning through the case method in undergraduate, postgraduate, and executive educational programmes across Turkey.

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1.0 Introduction to the Case Study Method

> *"Cases were introduced into Harvard's business administration courses in the early 1900's and the first book of written cases appeared in 1921"*

Heath, 2006

The use of the case study or case method in management education is almost 100 years old. It was first developed at Harvard Business School, in response to a growing need for new ways of thinking about teaching and learning in management education.

Those original pioneers and scholars of the case method at Harvard looked to their Law School and Medical School for inspiration. For centuries physicians have kept 'case notes' which have formed the basis of modern medicine as we know it today. Similarly, in the Western world, legal systems have been formed through the development of what has become known as 'case law.' So, it is not surprisingly that Harvard scholars noted these approaches and adapted them for the management case study approach, which has become so popular today.

> *"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 approach to the case method has subsequently been adopted and adapted in many different ways by practitioners from Business Schools and Management Centres across the world, and today it is fully embedded as part of the professors/tutors/facilitators toolbox for classroom delivery. Once the preserve of the postgraduate's classroom, nowadays the case method is equally as popular with undergraduate learners, post experience/executive learners, as well as work-based learners.

Growth in the Adoptions of Case (source: The Case Centre, UK, 2016)

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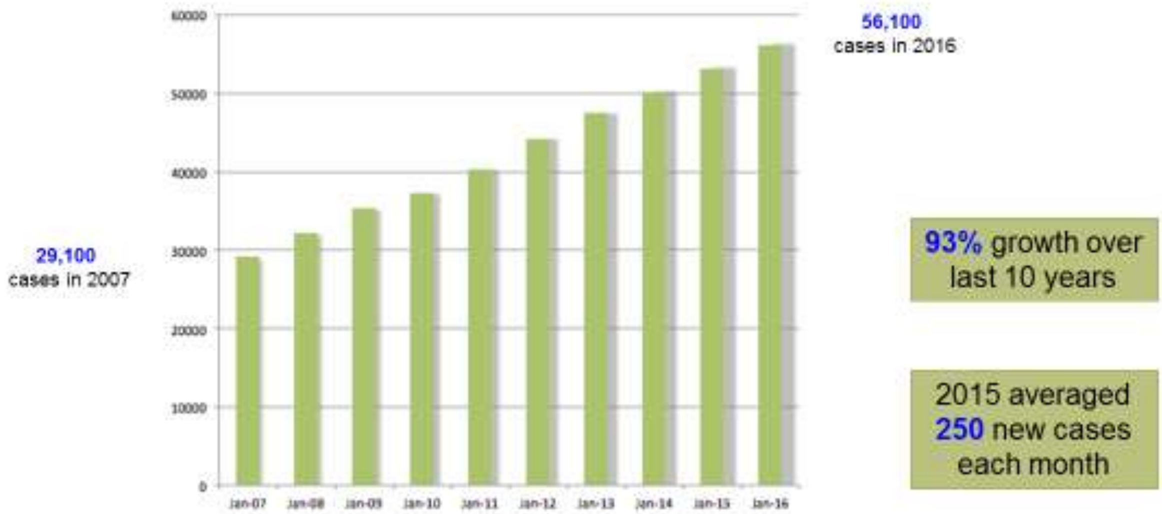

As the figure above illustrates, there has been a significant growth in the use of the case method over the past ten years. Whilst approaches to the use of the case method may vary from place to place, and a variety of technologies have been adapted to enhance the learning experience, the general principles and approaches of the case method remain the same: to encourage 'discovery' and 'reflective' learning through discussion, analysis and critical thinking, based on the narrative of a situation or sequence of events in an organisation.

This course book draws insights from those who have delivered cases in a range of learning contexts, in different parts of the world, whilst also reflecting on the way in which Turkish culture draws specific aspects of the case method into sharp focus. The case method needs not only to consider the 'management situation' that presents itself in the text, but also the nature and style of the learner (the student) who will be working with the case, in order to learn how better to respond to management-type situations. With this in mind, it is very important to also consider the culture of the classroom and the nature of the learner who will be working with the case study.

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This course book provides a number of methodologies and approaches that have proven to be successful and effective in a range of different learning environments, whether that is for small group, large group, remote learning, assessments, or in-work learning.

In this first chapter, we will begin by considering a shift in mindset from that of 'teaching' to 'learning.' The person responsible for delivering the case session may need to consider what it means to adapt delivery styles from the more traditional functions of the 'instructor' or 'teacher' or 'specialist knowledge provider.' Before embarking on the principles and practices of case teaching, it is important to consider the roles of the instructor and what it means to shift from a directed learning approach to being a 'learning facilitator.'

1.1 Roles of the Case Learning Facilitator (Tutor)

> *"Quality case teaching requires extensive preparation, careful thinking and a tremendous personal commitment."*

Erskine, Leenders and Mauffette-Leenders, 2003

The familiar Turkish approach to 'directed' learning has evolved through centuries of teaching in the classroom. However, the case method embraces a participant-centred learning approach. To achieve this, there needs to be a shift in the mindset of the student away from a dependency on the teacher/tutor as the director of learning and specialist knowledge provider.

To achieve this, the case tutor needs to consider the following roles and responsibilities:

- Manager of group learning

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- Good listener
- Stimulator of student interest
- Discussion facilitator/director
- Empowerer of students (an equal?)
- Developer of critical learning points
- Specialist knowledge provider (sometimes)
- Timekeeper
- Recorder of discussions
- Summariser of group discussion
- Establisher of group consensus

Perhaps most importantly, the case tutor should be someone who shows enthusiasm, has a sense of humour, is approachable, articulate, and inspiring. The role presents some challenges to the Turkish mindset and it may be helpful to have an induction process where the learners/students are introduced to the case method and its principles and practices. During an induction, learners will be invited to consider what they can expect from their tutors/facilitators and what their tutors can expect from them. This is often referred to as 'agreeing the educational contract' and might involve the delivery of a sample case exercise to enable the students to orientate themselves with the case method and have a 'dry run' before the course begins. It is quite normal for a learner in Turkey to feel uncomfortable with the notion of challenging others in the classroom and particularly to challenge the facilitator, so there needs to be some nurturing and an agreement between all parties about an acceptable approach to the classroom discussion.

Over 200 Turkish case tutors were asked what was the hardest thing about using the case study method in Turkey. Some of the most frequent responses are listed below (a full set of responses can be found in Appendix 3 at the end of this course book):

- Hardest thing is students are sometimes lazy, they do not prepare before the class.
- Students are not used to making proper, in-depth analysis.
- Establishing the links with firms to get relevant information.

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- Not a lot of experience - both students and teachers.
- There are very few good and relevant cases which focus on Turkey.
- Students prefer a more directed approach.

The level of intervention of the tutor will be determined by a number of factors. In general, the aim of the case tutor is to become less directive in approach as the learners develop a greater confidence in the handling of the class discussion process. However, there are a number of reasons why a more directive approach might be preferable as listed below:

	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

The chosen approach to planned delivery of the case discussion will be explored later, but first it is important to consider the impact of the case study on the way we think about learning.

1.2 From Teaching to Learning

> *"Students learn best that which they teach themselves. Passive and mindless learning is ephemeral. Active mindful learning simply sticks. The case method makes learning sticky by placing you in situations that require intervention."*

Bruner and Darden, 2001

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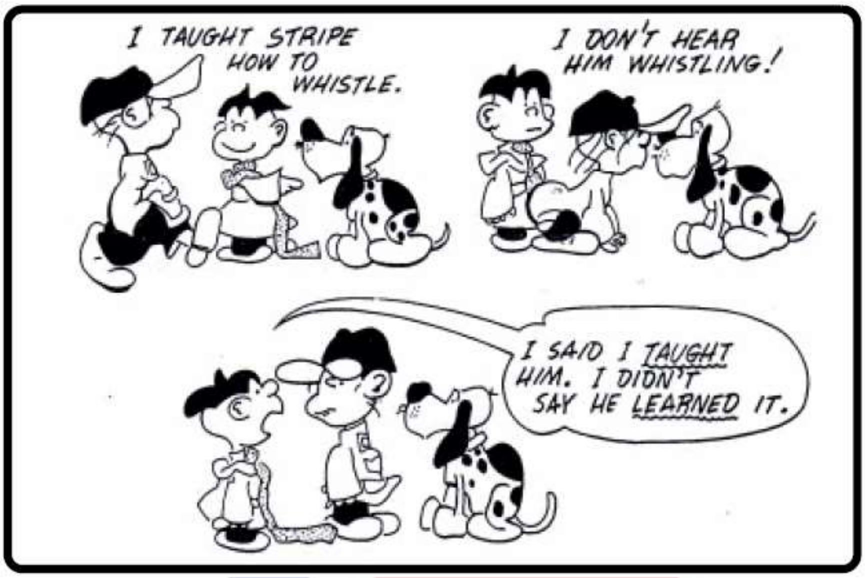
Case-Study Alliance
TURKEY



(Source unknown.)

Before thinking about how the case study can be used in the classroom, it is important to consider how it will be used to facilitate learning. Far from simply imparting knowledge, the case study offers an opportunity for student-centered learning, involving individual and group learning, discussions, and opportunities for discovery and reflection.

So, what do we mean by learning? We might argue that 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.

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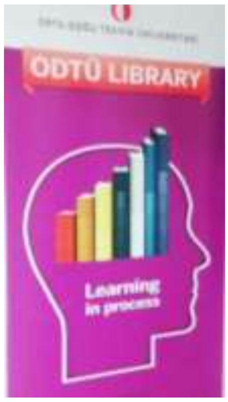
But we all learn differently, and it is important to consider how this informs the way that the case sessions are designed. For example, how do you ensure that everyone engages with the issues in the case? That everyone has an opportunity to contribute? That all viewpoints are considered? That the classroom introverts can play an equal role to the classroom extroverts?

Here are a few thoughts about how different scholars have interpreted approaches to learning:



- 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

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One ancient proverb states:

> "Tell me and I will listen
>
> Show me and I will observe
>
> Involve me and I will learn!"

So, at the heart of the case experience is the *involvement* of the learner. Students are invited to participate in a student-centred discussion where the case "teacher's" role is seen as one of guiding student discussion, rather than providing answers.

The student discussion based on the data in the case study, should be drawn from actual (or true-to-life) situations, where the responsibility for analysis and conclusions about issues raised by the data in the case rests with the students.

The focus, therefore, is on student learning through their own individual and joint efforts.

2.0 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

This is a very short case that describes a single incident. It can be used during a lecture or lesson to illustrate a concept or raise an issue for discussion. It can be read quickly and normally needs no pre-class preparation by students. Case incidents can be useful way of introducing students to the case method.

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The Background Case

The main purpose is merely to impart information on an industry, company, or in a way that has greater interest than a conventional reading or handout. The student identifies more readily with data presented in case form than he/she would with an impersonal document. A typical background case can be used as a framework within which other cases explore specific issues.

The Exercise Case

This provides an opportunity for the student to apply a specific technique and is widely used where quantitative analysis is required. The manipulation of numerical data within the context of a real situation is more interesting for the student than the use of the same skills as a purely academic exercise.

The Situation Case

This is the type usually envisaged when the term 'case study' is mentioned. The student is asked to make an analysis of the information embodied in the case and to delineate the significant relationships existing among the various items of data. This often involves the question 'why did things go wrong and how could this have been avoided?'

The Complex Case

This is a development of the situation type case where the significant issues are immersed in a mass of data, much of which is irrelevant. The problem for the student is to distinguish the vital issues from a number of superficial ones, which serve only to distract the attention. A further complication is that the embodied issues may be interdependent.

The Decision Case

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This goes a step further than those listed above. Here the student is required to state what he/she would do in the circumstances described and to formulate an action plan. In order to do this, the student must develop a variety of feasible approaches and then exercise judgment in selecting the approach which appears to have the highest probability of success.

2.1 What Makes a Good Case?

There has been much research into what are the hallmarks of a good case learning experience. At the heart of a good experience is a good case study, which contains enough data to tackle a useful and relevant issue or collection of issues, for which the students are able to make an analysis of a description of a situation, or an account of a sequence of events, which raises issues for discussion and from which potential solutions and/or conclusions can be drawn (Heath, 2006).

Professor Derek F. Abell, a seasoned case teacher and writer from IMD, Switzerland, made the following suggestions when asked what makes a good case:

- 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

In summer 2016, the same question was asked of Turkish case tutors and the following suggestions were presented (a full breakdown of responses is listed in Appendix B):

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* Brings dynamism to courses both for students and instructors
* Makes clear links between theory and practice
* Allows jumping into the shoes of the entrepreneur or the professional
* Is very useful for practice based learning
* Gives an opportunity to solve real life problems
* Contributes to analytical thinking
* Enhances decision making skills
* Maintains interest and participation in the class

Further research from Rotterdam School of Management supports the suggestions of Professor Abel and adds that a good case needs to have a clear focus, a situation-specific, fresh topic with contrasts, tensions, controversy, or other dramatic elements, and provides a multi-layered set of issues. This research continues to recommend that some of the most popular cases include the following:

* 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
* Cases that encourage role plays and exercises (instructions have to be very clear).

The UK-based Case Centre, which contains the world's largest collection of management case studies proposes the following factors which it refers to as the ground rules for successful cases:

* One or two main issues
* Includes a protagonist
* Tells a turnaround story
* Includes a cliffhanger
* Is based on companies and brands that are familiar to the learners

In summary, a clear challenge here is to ensure the cases that are selected link well with the intended learner group. Hence it is very important to know the students well in order to ensure case selection is best suited to both their pedagogical and cultural needs. Not only should the content of the case data be familiar to the learner but also the style of writing needs to be contextualized in a manner that is suitable for the local reader.

2.2 Anatomy of the Case Study

There are a number of other questions that you may wish to ask when considering the right type of case to select for your learners. These questions should enable you to consider aspects related to the anatomy of the case including:

Setting:		
Where the story takes place	familiar to learners	unfamiliar
Topic:		
What the story is about	familiar to learners	unfamiliar
Issues:		
Matters embodied in the case	few	independent
	many	interdependent
Data:		
Information embodied in the case	little	explicit
	much	implicit
Discussion time needed:	short	long
Treatment:		
Mode of thinking required	deductive (apply theory)	convergent (analytical)
	inductive (develop theory)	Divergent (creative)
Analysis:		
Type that can be achieved	closed	open
	(one answer)	(several possible)

3.0 Preparing to Teach with Case Studies

> *"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."*

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Shapiro, 1984

So far, this course book has identified that selecting the right case is a critical component of successful case teaching. The case needs to be appropriate for the pedagogical objectives of the class session. Yet the case also needs to engage the learner to ensure they are motivated and willing to undertake the preparation necessary to ensure they are fully equipped for a classroom discussion.

The previous chapter has identified that there are many different types of case studies which differ in size, scope, format, and written style. Not only is it important to select a case on the basis of its learning objectives but it is also essential to consider the likelihood of the learner (student) group's willingness to engage with the subject matter.

The format of the case may play a significant function in motivating the learner to engage with the text. While content is important, the style of presentation also plays a key role in facilitating the learning process. The case can be presented in a range of different formats, from a large paper-based set of data, to a range of sequential mini cases.

As we will discover later in this book, cases can also be made available in video format, online, or as multimedia learning tools. So, having chosen the case that you wish to use with your learners, what are the next steps for preparation for delivery to the class?

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3.1 Case Class Preparation

It is important to consider the profile of class as you are planning your classroom discussion. Clearly, large groups need to be managed differently to smaller groups. Preparation with larger groups in mind may necessitate the need to break up the class into smaller groups and set brief assignments/questions for general feedback to the whole group to ensure maximum participation.

The learning objectives of the sessions and the resources/materials available to support the discussion should be considered to ensure the approach to delivery is best suited to the achievement of the learning objectives.

No case study sits in isolation, but rather should be delivered as part of a programme of learning and, as such, clear links to theory and to other subject areas ought to be considered when planning where in the programme schedule to locate each case study.

If the case is to be assessed, then the purpose of the assessment and the introduction to the assessment objectives should be planned. This is considered later in the book in Section 6.

Here is a list of some of the other items you might wish to consider as you prepare to deliver case based classroom sessions:

- Who are the students?
- What is the purpose of the case?
- Have I/the students mastered the facts?
- Cross-reference personal plan to the teaching note (see further details in section 4.2)

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- 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 lectures/future topics/other topics?
- Establish clear opening and conclusion to the case discussion
- Planning the use of the board – (a) What main headings should I use? (b) How should I structure the board?

3.3 Preparing the Student

For some students in Turkey the case method of learning may be a very unfamiliar approach which requires some careful induction and support to ensure the learners are fully equipped for the learning experience. To do so, it is proposed that students might be asked to undertake seven general considerations as part of their case preparations:

What are the key issues of the case?

There is normally a central key issue in the case, but there may also be a number of sub-issues which can be either independent or interdependent in relation to the main issue. These linkages between sub-issues often provide the opportunity for discovery in the case analysis.

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Who are the key stakeholders?

This question invites the learners to anticipate all the different key stakeholders in the case and to appraise the key issues raised by the case from a number of potential viewpoints or perspectives. It is often by analyzing from different viewpoints that a richer and fuller picture emerges of the real issues brought up in the case.

What extra data would it be helpful to access in order to more fully appraise the issues raised in the case? And where will I find this?

The traditional Harvard philosophy of the case method was that all the data required to address the issues raised in the case could be found within the narrative of the case. However, this approach has long since declined in popularity, given the introduction of the internet, which has enabled learners to access a myriad of data sources on the organisations presented in case studies (or like-type organisations). Often today, cases can serve as signposts which encourage learners to investigate issues further, by drawing on data from third party sources by their own independent and group based investigations, which they can then bring with them to the classroom discussion time.

What skills are being tested in this case?

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Whilst the original premise of the case study was to provide students with the data through which they could 'solve' the case, cases have since emerged to provide a whole range of different teaching and learning objectives which deploy many different skills; for example:

- 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

Are there any case snags or hidden issues?

There are often a few hidden surprises in the case study which provide opportunities for further exploration and/or analysis. Sometimes it may be necessary to provide an interjection during the class discussion to introduce a new piece of theory or some further data/exhibits in order to promote the discussion further. It is important that students know '*where'* to access all the relevant data and '*what*' to do to effectively analyse the data, in order to be in a position to make an evaluation.

Often case snags and hidden surprises can be found in the chronology or time structure of the case. It may be helpful to instruct students to make a timeline of all events outlined in the case as part of their initial preparation for the class discussion. This should make it easier to determine links between different sections of the case, which is particularly helpful in larger case studies.

What management theory, models, or learning tools may support this case analysis?

It is important for learners to consider the role of theory to inform the way they think about the issues raised in the case. Sometimes students can be invited to draw from a specific

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model or aspect of good management practice to inform their analysis; other times it might be more helpful to encourage students to think for themselves about which aspects of management theory that they have previously engaged with could be pertinent to this case data. In addition to these '*deductive'* (theory applying) approaches, the case may also be positioned to promote '*inductive'* (theory developing) approaches to learning. When case studies are introduced in the early stages of a course or module, then a more directive approach may be adopted by the case tutor in order to assist a discussion through which the evolving or developing of a theoretical concept can be derived.

Scrutinizing the Opening and Closure of the case

Often the main issue raised by the case – the headline – can be found in the opening section. It is quite common for case writers to reinforce this main issue/point in the concluding section of the case. A contrasting of the opening and closing sections is a useful approach to clarifying the key points from the case which may need to be addressed by the students.

3.4 Deciding on Viewpoint

For every story there is a storyteller, so the case writer must decide who is to tell the story. The case may be written from many different perspectives. Sometimes the perspective that has been chosen by the writer may not be the best perspective for your target learner group, in which case it is important to ask the question, "How can I modify the way in which the learner engages with the case data to ensure the perspective is most suited to the learning opportunities that my particular students need?"

The choice of viewpoint will determine how much you can let your reader know. Hence it is a key issue in relation to the expository structure of the case. Learners can be invited to address the issues in the case from two major points of view—omniscient (all-knowing) or character (actor).

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Omniscient Viewpoint

When authors choose to present the data from this viewpoint it permits the learner to see, know, and explore everything that serves the storyline. Thus, it provides the greatest freedom as the story is told from outside, commenting on anything the author chooses. Students may then address the issues impersonally as the all-knowing god-like viewer, without crediting the comment to any particular character within the story.

Although the omniscient viewpoint provides great freedom for the learner, it has several shortcomings. Firstly, it can make it more difficult to involve the learner directly in the case issues. If the author's voice intrudes too obviously, it is harder for the reader to forget that this is just another case. Secondly, here is the risk that the author's assessment of the situation will emerge and pre-empt the reader's own evaluation of the case.

Character Viewpoint

Character viewpoint lets the story be told through the eyes of one or more characters (actors) within the story (case), knowing and revealing only what the character knows and feels. Included within this category are first-person and third-person (major character) viewpoints, narrator-observer (minor character) viewpoint and multiple viewpoints.

First-person and third-person viewpoint has the advantage of telling the story (case) from one point of view. However, 'I', 'he' or 'she' can only relate what he or she knows or feels.

Narrator-observer viewpoint is that of a minor character within the story, whose position or special knowledge, makes this person a convincing observer. It may also be someone to whom the reader can relate more readily than the other characters in the story. Dr Watson, the narrator-observer of the Sherlock Holmes stories, is a prime example of the use of this viewpoint.

Multiple viewpoints involve telling the story from the point of view of several characters in turn.

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For the case facilitator, the teaching and learning objectives for which the case is being written will influence the choice of viewpoint.

If we wish to put the learner into the position of a decision maker within the case situation it may be appropriate to adopt a first person or third person viewpoint. Only those events that this person experienced, knows about, and had views upon are reported. The learner is presented only with the data available to the decision maker and nothing more. Thus, the case decision maker's situation is reproduced. In the same circumstances, and armed with the same data, what would the student do?

Multiple viewpoints can be useful in many case situations. For example, various members of his/her staff may present a manager with different perspectives and opinions on a situation. From these the manager will have to form his/her own understanding of the situation and decide the action it requires.   This type of case can also lead to a role-playing exercise in class.

The narrator-observer (minor character) viewpoint may be helpful in providing a person within the case to whom a young student can more readily relate than to senior managers. For example, a trainee, or graduate on a work placement/internship, may be in a good position from which to observe the actions of different people in a work situation in which he or she is not directly involved. From such a vantage point the 'facts' and 'opinions' of the situation may be reported in a detached and relatively neutral manner.

An omniscient viewpoint may be appropriate where the case writer is attempting to replicate the viewpoint of an external analyst or consultant. He or she may have collected data on a case situation from a number of sources and is now to produce a report, perhaps for senior management or some outside authority.

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Examples (source: Heath, 2006)

The short case incident below is narrated from three different viewpoints.

1. ***An awkward incident (omniscient viewpoint)***

   Mary O'Hara, a training school supervisor, was approached one morning by one her trainees who were obviously very agitated about something. Pointing to a man leaving the office, the trainee said that she had just seen him searching through the pockets of her coat. The coat was hanging on a rack near the door with several others.

   Mary recognized the man leaving the office as the company's maintenance electrician.

   She asked the trainee if there was anything missing from her pockets. The trainee said she didn't think so.

   Mary O'Hara was uncertain what she should do now.

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2. An awkward incident (first-person viewpoint)

"One morning, soon after I became a supervisor at the training school, one of my trainees came up to my desk in a very agitated state. She said that she had just seen a man searching through the pockets of her coat. The coat was hanging on a rack near the door with several others.

I looked up and saw a man leaving the office. It was the company's maintenance electrician.

I asked her if there was anything missing from her pockets. The trainee said she didn't think so.

I wasn't sure what to do next."

3. An awkward incident (narrator-observer viewpoint)

"The incident occurred when I was a trainee. Our supervisor, Mary O'Hara, had a desk near mine. One morning one of the other trainees went up to Mary's desk in a very agitated state. She told Mary that she had just seen a man searching through the pockets of her coat. The coat was hanging on a rack near the door with several others.

I looked around and saw a man leaving the office. It was the company's maintenance electrician.

Mary asked the girl whether there was anything missing from her pockets. She said she didn't think so.

It seemed to me that Mary didn't know what to do next."

4.0 The Case Teaching Plan

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"A case is a text that refuses to explain itself."

Ellett, 2007

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 environment 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 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:

4.1 Opening and Guiding the Discussion

"Once I have started the case by calling on someone, I then generally throw the discussion open to others who may have raised their hands. Who to call on next? I am conscious of several things at this point. I very much want the conversation to hop around the class, from one side to another, from front to back, so that everybody gets involved."

Schmenner, 2002

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Case-Study Alliance
TURKEY

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, an early case pioneer of Harvard Business School, used 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 ….”

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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. 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 to students' comments

In order to manage this process as part of a journey for the learner, it is often helpful to construct a tutor's map to accompany the case study data, which the tutor can use to irientate themsekves within the data.

4.2 The Case Map

The case map can be constructed and used by the facilitator 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 are 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 facilitator's job to plan how to effectively use the time in the classroom to enable the learners to be guided and supported on their journey through the data in the

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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 encountering "interesting visiting points" along the way.

The exhibit at the end of this book 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:

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

The provision of a set or sequence of questions provides only 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 pre-requisites that the students bring with them into the classroom.

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- A collection of carefully crafted questions to enable opportunities progress through the issues (breadth) and for 'Analysis' and closer critical examination of the 'Issues Raised' in this case data (depth).
- Consideration of how theories, models, matrices, and good management practices from published resources to 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 us 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 personal 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 as possible about the learners 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. The more the case facilitator can understand the behaviours, experiences and competencies of the students who will be undertaking the case discussion, the more likely they will be able to prepare an approach to the case journey which best supports their learning. In this way, the learners ought to hold a different position or an enhanced perspective on the case by the end of the journey to that which they held at the beginning of discussion.

Carefully crafted questions

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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 in further detail 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 (KLOs). 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

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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).

When deciding on viewpoints, it is 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 (KLOs). 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 KLOs first in order to ensure that the rest of the planning is undertaken with the pursuit of the KLOs 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 KLOs for a single class 'journey.'

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4.3 Defining the Right Questions to Facilitate the Case Discussion

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:	Orientation:
• What is the problem here?	Problem identification
• How do you feel about..?	Attitude/opinion eliciting
• What do you notice about?	Attention drawing
• What other examples are there?	Thought provoking
• What might be done to?	Problem solving/reducing
• What else might be done?	Generation of alternatives
• 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 course book to help to determine the nature of the journey for the learners.

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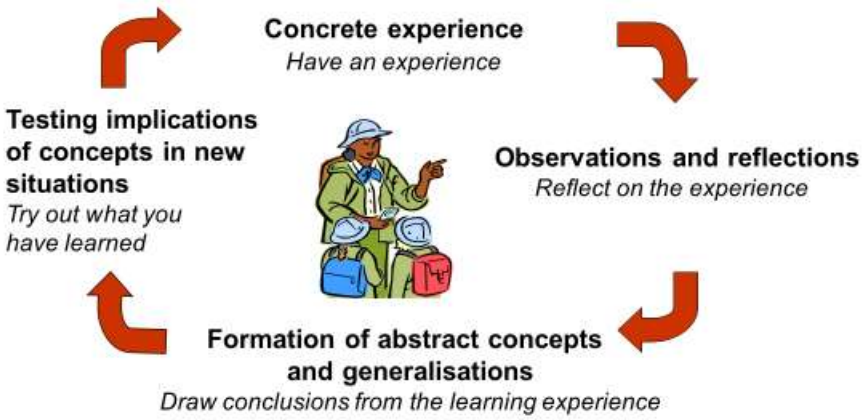
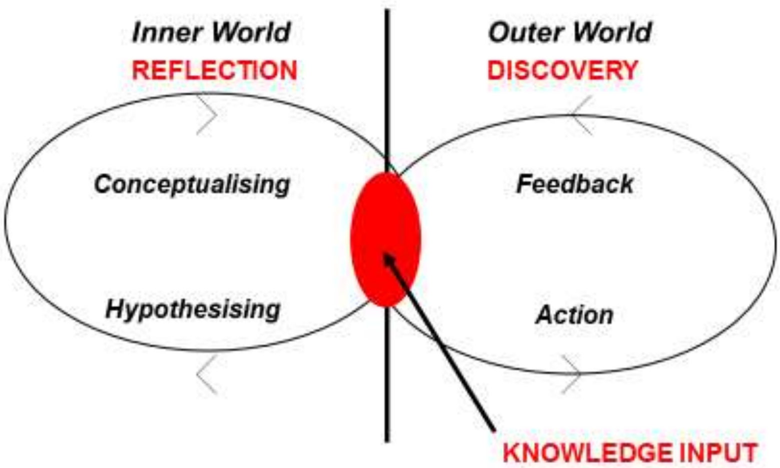
4.3 Theories About Learning Through the Case Method

The case method adopts a threefold approach to experiential learning involving knowledge input, discovery and reflection. The Kolb cycle, an illustration of which is adapted below, is a commonly adopted model to express the different dimensions of experiential learning:



The following model of learning identifies that there are three different ways of learning – input, discovery, and reflection:



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It is proposed that, when looking at how to relate theory to practice using the case method, different learning loops can be adopted as exemplified below:

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."

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."

Learning Styles Theory

When planning the case discussion, it is worth considering the types of learning styles exhibited by the learners. We all learn differently and we all exhibit different learning styles. A person develops a preferred learning style which is influenced by his/her personality, previous learning experiences, and environment. Typically, these approaches can be categorised into four broad types, summarised below (adapted from Honey and Mumford, 2001):

Activists

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Activists involve themselves fully and without bias in new experiences. They are open-minded and enthusiastic about anything new. Their philosophy is: 'I'll try anything once'. They dash in where angels fear to tread. They revel in short term crisis firefighting. They tackle problems by brainstorming. They tend to thrive on the challenge of new experiences but are bored with implementation and longer term consolidation. They are gregarious people constantly involving themselves with others.

Activists learn best from activities where there are new experiences, problems, opportunities from which to learn; they can engross themselves in short 'here and now' activities such as business games, competitive teamwork tasks, role playing exercises; they are thrown in at the deep end with a task they think is difficult; they are involved with other people and solving problems as part of a team.

Reflectors

Reflectors like to stand back to ponder experiences and observe them from many different perspectives. They collect data, both first hand and from others, and prefer to chew it over thoroughly before coming to any conclusion. They tend to postpone reaching definitive conclusions for as long as possible. Their philosophy is to be cautious: 'Look before you leap'. They are thoughtful people who like to consider all possible angles and implications before making a move.

Reflectors learn best from activities where they are allowed or encouraged to watch, think, mull over activities; they are able to stand back from events and listen/observe; they are allowed to think before acting, to assimilate before commenting; they have the opportunity to review what has happened, what they have learned; they can reach a decision in their own time without pressure and tight deadlines.

Theorists

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Theorists adapt and integrate observations into complex but logically sound theories. They think problems through in a vertical, step-by-step, logical way. They tend to be perfectionists who will not rest until things are tidy and fit into their rational scheme. Questions they frequently ask are: “Does it make sense?” “What are the basic assumptions?” They prefer to maximise certainty and feel uncomfortable with subjective judgements, lateral thinking, and anything flippant.

Theorists learn best from activities where what is being offered is part of a system, model, concept, theory; they have the chance to question and probe the basic methodology, assumptions or logic behind something; they are in structured situations with a clear purpose.

Pragmatists

Pragmatists are keen on trying out ideas, theories and techniques to see if they work in practice. They like to get on with things and act quickly and confidently on ideas that attract them. They do not like ‘beating around the bush’ and tend to be impatient with ruminating and open-ended discussions. They are down to earth people who like making practical decisions and solving problems.

Pragmatists learn best from activities where there is an obvious link between the subject matter and a problem or opportunity on the job; they are shown techniques for doing things with obvious practical advantages; they have the chance to try out and practice techniques with coaching/feedback from a credible expert; they are given immediate opportunities to implement what they have learned.

Having determined the type of learners in each class group, the case tutor is in a better position to place the learners into blended syndicate groups which provide a mixture of different learning styles to foster a greater likelihood of student engagement

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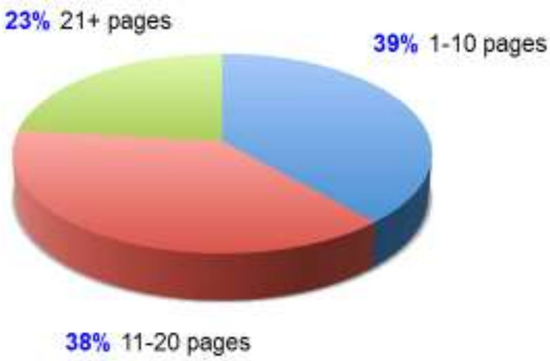
4.4 Teaching with Various Presentational Forms of Cases (e.g., multimedia cases)

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:



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'

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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.

> "*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, which has led to 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 mapping a route 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 student 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'Cinneide, 1986

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In additional 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 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 sheet of 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*. While 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 as well. It is important to remember that the principal 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

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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/CD ROM or video material, it is important to ensure the correct IT support is in place to address any configuration issues.

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

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 such learners would normally have insufficient world-experience from which to draw to inform their appraisal of issues in the case. Or as one Harvard professor once noted:

> "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

In a relatively short period of time, however, 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

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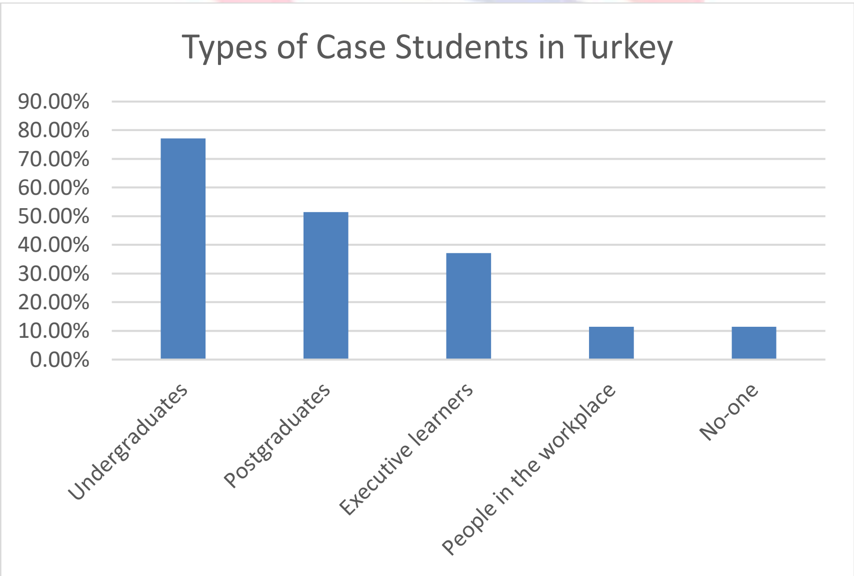
case was a whole and complete learning package. This resource developed ahead of the evolution of online web-based material. Today, the learner is easily able to access massive data searches which can, when managed sensibly, provide significant support to the analysis of the case. For example, if the 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.

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

The UK-based Case Centre recognize that there is a growing demand for further training and scholarly research into the use of the case method, to target approaches to different groups of learners. The first 'undergraduate case development' workshop was hosted by the Case Centre in 1999 and these workshops continue to be offered on a frequent basis today. In a recent survey of over 200 Turkish scholars the use of the case method in Turkey across different learner groups revealed that its adoption among undergraduate learners is very significant:



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However, the use of the case method with different learner groups does present challenges and often leads to a re-thinking of the types of approaches 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 to 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, which 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.

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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 management roles in the workplace often find excessively long cases to be difficult resources 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 1 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.

5.0 Evaluating Case Study Participation

At the end of the case session it is useful to consider how the learner has captured the learning outcomes from their experience of the discussion. This is where the class time switches from 'discovery' learning to 'reflective' learning. There are a number of ways in which the case facilitator can sum-up the class discussion and bring closure to the case 'journey,' with questions such as those listed below:

"How else could we approach this?"

"What else could we explore?"

"On a single sheet of paper…."

"On a rating scale…."

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By asking these questions, the facilitator is promoting reflection before the discussion has been completed. This may also provide a useful reflective insight for the facilitator as well as the learners, by enabling insights to be drawn on the degree to which the learning objectives have been achieved.

At the end of the class session it is helpful for the facilitator to ask a number of reflective questions in order to address the opportunities gained during the class time:

- 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?

6.0 Using Cases for Assessment

The case method has been used as an assessment tool for almost 100 years, with written reports, reflective papers, and classroom contributions being assessed. When assessing with written papers and/or exams there are a few questions that need to be addressed:

- How does the assessment support Key Learning Objectives?
- Can the assessment be developed to be an assessment *'for'* learning as well as an assessment *'of'* learning? (ie., What is its contribution to learning?)
- What type of case would be most suitable for the assessment? (size/format)
- How can you provide effective feedback to further promote reflective learning?
- Will learners be able to preview the case prior to the assessment or not?
- What is the expectation of the student – what are they being marked against?

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When considering assessment of classroom contribution, the learner ought to know the criteria against which they are being assessed. The many different types of developmental indicators for the case have already been illustrated in earlier sections of this book, but in addition, the table below provides some suggestions of possible areas where students might be rewarded and some where they might be punished:

"punish"	"reward"
reluctance to contribute	initial efforts to break the ice
restating the case	positive / creative thinking
general statements	insightful comments
verbosity	persuasiveness / sharpness
paralysis through analysis	mental agility / risk taking
off-the-point comments	balancing intuition and analysis
taking oneself too seriously	humility / sensitivity towards others

7.0 Case Teaching Notes

As of December 2015, 46% of cases in the Case Centre collection had teaching notes. However, for the 50 most popular cases this figure rises to 95%, demonstrating that cases with teaching notes are far more popular for other case users. According to the Case Centre, on average 1485 teaching notes are downloaded from thecasecentre.org each month, with notes varying in size:

- Longest: 120 pages
- Shortest: 1 page
- Average: 11 pages

The teaching note represents a formal presentation of the case author's own map, providing insights into how the case was constructed and for what purposes, with illustrations of how it might best be used in class discussions to achieve certain Key Learning Objectives (KLOs). Users of the teaching note are able to derive the benefits of the authors' own insight and discover how cases have been received in class sessions.

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In general, most teaching notes ought to include the following sections:

Summary of the case

Some cases are intentionally constructed to provide hidden, ambiguous, or misleading data. Given that the teaching note is solely for the eyes of the case tutors, the summary of the case ought to provide a very clear explanation of the content of the case and the situation that is being described in the narrative.

Teaching objectives and target audience

These are the KLOs which provide the starting point for mapping the journey that the learner is expected to take. The target audience provides an insight into the likely development level for which this type of case is targeted.

Teaching approach and strategy

This section begins to explain the journey that students might take in the class discussion and should detail the settings in which the case has been/is most likely to be an effective learning tool. The author may choose to suggest some of the following:

- Approaches to 'teaching' the case
- Student preparation requirement/questions to be addressed

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- Approach to be adopted - classroom discussion/role play/others?
- 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

The management of the journey involves processes related to breadth (getting from A to B) and depth. This latter point is reflected in the analysis section of the teaching note, which highlights the '*interesting visiting points'* from the map. These often correspond to the way in which the data in the case links to management theory. During this section the author may provide details on the following:

- 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

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This section may contain suggested additional readings/sources of other learning support material to be used in conjunction with the case, specific readings which can be assigned from a list provided and, where appropriate, useful web links.

Feedback

The UK-based Case Centre stipulate that all cases submitted their global collection should have already been tried and tested in the classroom. The teaching note often provides feedback from the tutor related to how the case worked in the classroom, highlighting lessons learnt – what works and what does not work with different student groups. This feedback might also provide an indication of the case's suitability for written assessment or examination.

What happened next….?

Where known, the teaching note might present details of the actual outcome of the case situation and some follow-up facts.

Exhibits

As well as exhibits at the back of the case study, the teaching note sometimes includes exhibits which provide you as the tutor with further information. Sometimes these resources can be used as additional handouts to learners either pre-discussion, during, or post-discussion. Exhibits may be used for the following:

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

In addition to these core sections, some teaching notes also contain the following:

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- New perspectives on the case
- Discussion notes
- Assignment questions
- Teaching questions
- Time span
- Background materials/slides

A note of caution: For a busy case tutor, there is a tendency to immediately default to the case teaching note and effectively adopt the *map* produced by the author. However, this is invariably flawed as the case author never intended the case for your specific students. It is far more effective for you, as the case tutor, to develop your own *map* with your own students in mind - the *pre-requisites* that they bring into the classroom, the *interesting visiting points* that you want to showcase, the *KLOs* that you are seeking to achieve – and then to cross reference your map to the author's map to see if this adds value to your own planned journey. To do otherwise, will likely lead to an ineffective and less precise journey, both for you and for your learners.

8.0 Concluding Thoughts for Teaching Cases in Turkey

> *"I believe the case method should be adopted for at least 1/4 of undergraduate, and 1/2 of postgraduate education in Turkey*."

Anonymous Turkish Management Scholar and Case tutor, 2016

Case studies are being used in a very broad range of different business and management subjects. The two figures below demonstrate the range of current usage in business and management subjects in Turkey (based on recent research among Turkish case tutors), in comparison to global usage figures from the Case Centre:

Usage of the Case Method in Turkey by Subject:

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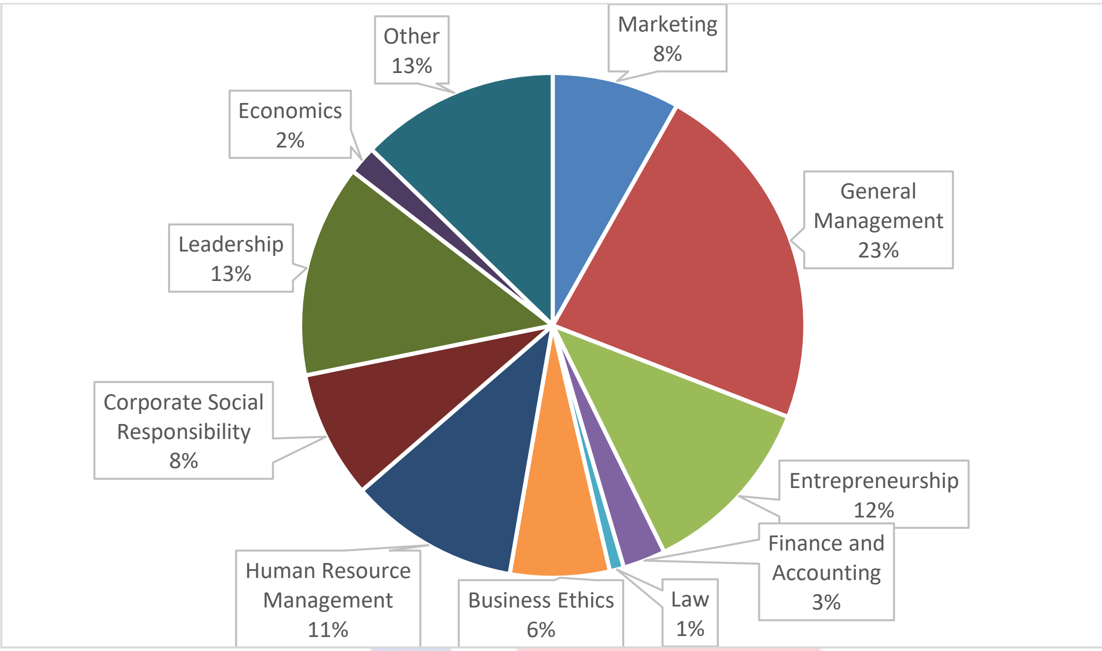
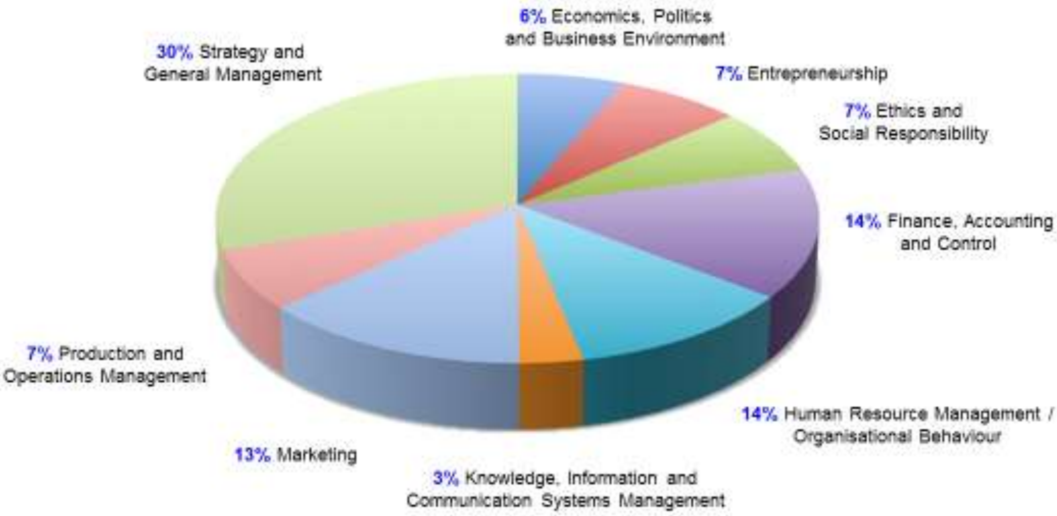


Submissions to the Global Case Collection from across the world by Subject (source: The Case Centre, UK, 2016):



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Source: The Case Centre, UK, 2016

As the diagram above demonstrates, the use of the case method is now a global phenomenon, but very few of the resources presently available focus on the Turkish market. Harvard, Ivey, INSEAD, IMD, RSM and LSE are all renowned case writing organisations generating large volumes of high quality cases written for their own students. However, none of these organisations write cases specifically with students from Turkey in mind. In other words, the types of cases and case teaching plans that will best serve the needs of the Turkish learner are more likely to come from within Turkish universities than elsewhere. Even where existing cases do fit the needs of Turkish specific management programmes, it is important that the teaching plan and the style of delivery is personally developed to ensure that it best fits with the pedagogic needs of the targeted learner group.

As Prof Abell from IMD states, a good case is one that is personal! To develop a personal delivery style that reflects both you – as the case tutor – and the socio-cultural mix of your classroom will provide greater scope for an effective learning experience.

In a survey of case tutors, one recent participant stated:

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"I think these workshops may help the prospective case writers to build a literature on Turkish case studies, thus provide lecturers a larger body of cases from which they can choose the best fitting cases for their subjects."

With this in mind, the Case study Alliance Turkey (CAT) Project seeks to develop both case teaching and case writing skills to promote the evolution of a case collection constructed by scholars in Turkey for users in Turkish classrooms. The CAT project includes the delivery of a range of case study teaching and writing workshops. For further details about this project please see www.cat.ba.metu.edu.tr.

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9.0 Quick Reference guide

Twenty-Five Questions to Ask When Using Cases

> *"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)*

This quick reference guide seeks to explore the key questions that need to be addressed in order to ensure best practice for using cases in class discussions. It is widely appreciated that many different types of learners can use case studies, so this is by no means a 'how to..' guide. but is rather intended to provoke further thinking on the issues related to using cases. With this in mind, this quick reference guide does not seek to answer questions but instead tries 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 classroom discussion 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)*

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"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)

"Good cases are like onions – the more you peel away the outer layers, the more you discover inside." (Abell, 1997)

A. ABOUT THE LEARNER

1. Who are the learners?
    - How many of them are there?
    - Where are they in terms of their degree programme? – Early, Mid, End?
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 work-based placement or internship?
    - Are they adult learners?

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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?

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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 the target learner group 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 your learners in the past, and why?

C. THE CASE, THE LEARNER AND THE COURSE PROGRAMME

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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 and/or 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?

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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?

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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 amenable are large groups for different activities throughout the case exercise (e.g. role play)?

19. What pre-classroom planning is needed for effective 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 present classroom culture?

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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 PROCES

22. What further resources are available that might enhance the learning experience?

- How can these strengthen the link to theory in the subject area?
- Can guided reading be offered?
- Can links to on-line learning resources be provided?
- In what capacity could the students be considered to be a 'case resource'?
- What would be included in an 'educational agreement' that you might draw up with your undergraduates?

23. How can new case material be developed for my target learners?

- From where could new materials be sourced for the types of cases that work well with my learners?
- To what level can students be case writers for future teaching cases?

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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?

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About the Author:

Dr Scott Andrews has been a keen advocate of the case study method for more than 20 years, and has delivered case teaching and writing workshops to hundreds of scholars and academics in over 40 countries from five continents. He has spoken about the case method to many professional and public organisations including the World Health Organisation, The World Bank, The British Academy of Management, The European Academy of Management and the North-Eastern Decision Sciences Network in the US. He has been an international case trainer with the UK-based Case Centre for 20 years, and is currently based at the University of Worcester as the Strategic Lead for Work Based learning.

For Further details see http://www.worcester.ac.uk/discover/21720.html

Or contact: scott@smart-partners.co.uk

Scott is a part of the Erasmus + funded Case-Study Alliance Turkey (CAT) Team, which also includes partners from Rotterdam School of Management, Istanbul Technical University, and the Middle East Technical University. For further details of the CAT Project, its partners, other case teaching and writing resources, and details of future case workshops, see www.cat.ba.metu.edu.tr

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APPENDIX 1: About the Case Centre:

The world's largest and most diverse collection of management materials

- 56,000+ cases by individual authors as well as leading business school collections
- 10,500+ management articles
- 4,400+ individual chapters from management education books
- 25,200+ teaching notes & instructor materials
- 140+ multimedia items
- 600+ videos to accompany cases
- www.thecasecentre.org/collection

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APPENDIX 2 – QUESTION: What are the main benefits of using the case method in Management Education in Turkey:

ANSWERS:

- Interesting
- A projection opportunity of real work life.
- integrating the theory and application
- It is the easiest and most effective tool for teaching students as the cases are the reflection of real business life
- Case studies help students to synthesize, evaluate, and apply information and concepts learned in lectures and texts.
- Seeing real-life events - Asking the right questions (rather than answering the questions the professor asks) - Finding the problem (rather than interpreting on solution on a given problem)
- They examine what they learn. Their discussion abilities are improved
- Much more involved students
- Understanding of academic concepts with the help of the applications. With this way learner can visualize the idea of the concepts more easily.
- Case study helps the students to visualize the concepts in a better way.
- Turn theoretical information to practical application, just like experiencing professional cases
- They can visualize what they have learned
- Interaction among and with students, connection to business problems relevant to their work
- It helps to grab the real picture in business. Theories, applications mentioned in classes are a bit vague, but using case method help students to understand phenomenon's more easily and they become more solid and understandable with a case study.
- Case studies provide real life learning. Learners can make the situation more concrete.
- Interactivity+correlation of the theory and the real-life examples
- Relating theory to understanding/theoretical concepts to practice.
- Theory can be taught in an applied way, which makes it easier to learn & remember.
- Students are bored of theoretical knowledge and they want to hear and think about the real cases. Also it brings dynamism to courses both for students and instructors; since every class is a unique experience due to various inputs from the students have different perspectives . Students are more active through case analysis and I believe this way of learning is more effective than passive listening.

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- They can link between the theory and practice
- Students like it more than traditional lecturing, hands-on learning
- Getting out of the student way of thinking and jumping into the shoes of the entrepreneur or the professional, picking the variables up as to which ones should one pay attention and how much, which ones should one not consider that much. What kind of variables are visible, what are invisible but essential to learn...
- it is very useful for practice... learning is more effective than just theoretical presentations
- Interactive learning, more engaging method of teaching, executives can also reflect on their experiences.
- More engaging, since it is story based. they get to know different settings and companies.
- It gives an opportunity of solving real life problems; contributes to analytical thinking; and enhances decision making skills
- Practical and theoretical mixing way of learning
- See the practice of the theory taught in the lectures.
- It helps me to see if the students are on the same page with me for a specific topic.
- Make it easier for them to understand the subject
- It provides a learning environment living in such a real world while dealing with a case. because of this, I think most of the students face real world problems before face them.
- Linking theory with a practical example/virtual experience that makes learning more effective by addressing several channels. The case method allows to address emotion as a very important element for learning. The case provides also a red line and avoids to "get lost" and to go too far away in the discussion.
- Personally, I do not prefer to teach theory like a traditional instructor, rather I prefer classroom discussions. The main benefit of cases is creating an interactive learning atmosphere.
- Theoretical side of subjects will be backed up by cases. Learners will practice decision making and learn the way of thinking managers have
- Getting interest of my students and increase their participation in the class. Their attitudes towards class also were changed in a positive way.
- Linking and associating theory and real life
- Engaging the learner

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EXHIBIT 3 – QUESTION: What is the hardest thing about using Case Studies in Turkey?

ANSWERS:

- To find appropriate cases.
- There occurs a problem in analysis deriving from cultural differences if the case used in class is based on foreign work environment.
- Lack of cases about Turkish companies and lack of cases in Turkish
- It is not quite easy to find local case studies especially in English that is why I generally use case studies of foreign firms
- Turkish students are more used to teacher-centred education. Case studies shift the emphasis from teacher-centred to more student-centred activities. Therefore, using case studies in Turkey is challenging.
- To get permission from companies to use their data
- Only a few case studies in Turkish language. Really a big big problem. - Also very few cases that apply to the Turkish context.
- There is not enough material in Turkish
- The education system is different and memorising based up to undergrad levels. It's hard to change the style of it.
- I do not see any specific thing which is harder or making harder the usage of it. Unfortunately the usage of case studies is not prevalent.
- It's very hard to find cases in Turkish. This a problem especially for the students who don't speak English.
- Some of the cases (brands, services, and topics etc.) are unfamiliar for Turkish students. It may lead to become difficult for students to understand and analyse these kind of cases.
- Selecting the case study suitable for Turkish Business Context
- Finding high quality cases on Turkish companies
- Even writing case studies is troublesome. Nobody wants to give true information, neither the companies nor the legal authorities. Success stories are overrated, and stories related to mistreatment & such negative information are swept under the rug. Teaching something that companies wish to hide may create some trouble.
- There's not many people who write case studies in Turkish context. Generally case studies written abroad do not fit Turkish context (generally because of cultural differences)
- The students are not familiar with the HBS type cases which are very long and detailed. We mostly use shorter cases. Particularly undergraduate students are very impatient and unwilling. It's getting harder to manage the discussions with Gen-Y's.

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- Finding case studies appropriate to subject.
- Learners in Turkey in general would like to have one correct answer. The discussion that leads to usually more than one correct answer frustrates Turkish learners.
- Hardest thing is students are lazy they do not prepare before the class. Then you have to tell the case before the discussion. So it would be nice to have good slides with interesting visuals so that students would be interested by the case and understand it before the discussion takes place
- People don't use to make in depth analysis
- Students do not read the cases, do not come prepared. The companies in the cases are foreign companies, students cannot associate with them.
- Establishing the links with firms to get the information, spending enough time to learn their dilemmas
- Case studies in Turkey are not clear
- May be find applicable stories and cases
- Not a lot of experience - both students & teachers. Not many cases from Turkey (students could associate with cases more)
- There are very few cases where Turkey or the broader region is used.
- Population is high in Turkey which means the number of cases are high and also the culture is different which may causes sales and marketing problems
- Students prefer just listening and they request ready knowledge rather than thinking, questioning and discussing a topic.
- Students do not like to read..
- Obtaining real case stories
- There is not enough cases written or collected from different areas. Also, it is hard to write a (full - with all teaching resources) case...
- It ıs really hard to find a good case about Turkish firms, and also many of the cases are in English and many students are not capable of reading.
- Lack of enthusiasm of learners (cultural issue) during their whole life we force kids to obey their elders and ask them not to bother themselves with issues. "it is none of their business" some think. So some Turkish students find it odd.
- Finding the beneficial resources (both as a person and as a printed document)
- Acquiring genuine cases
- Students prefer a more directed approach

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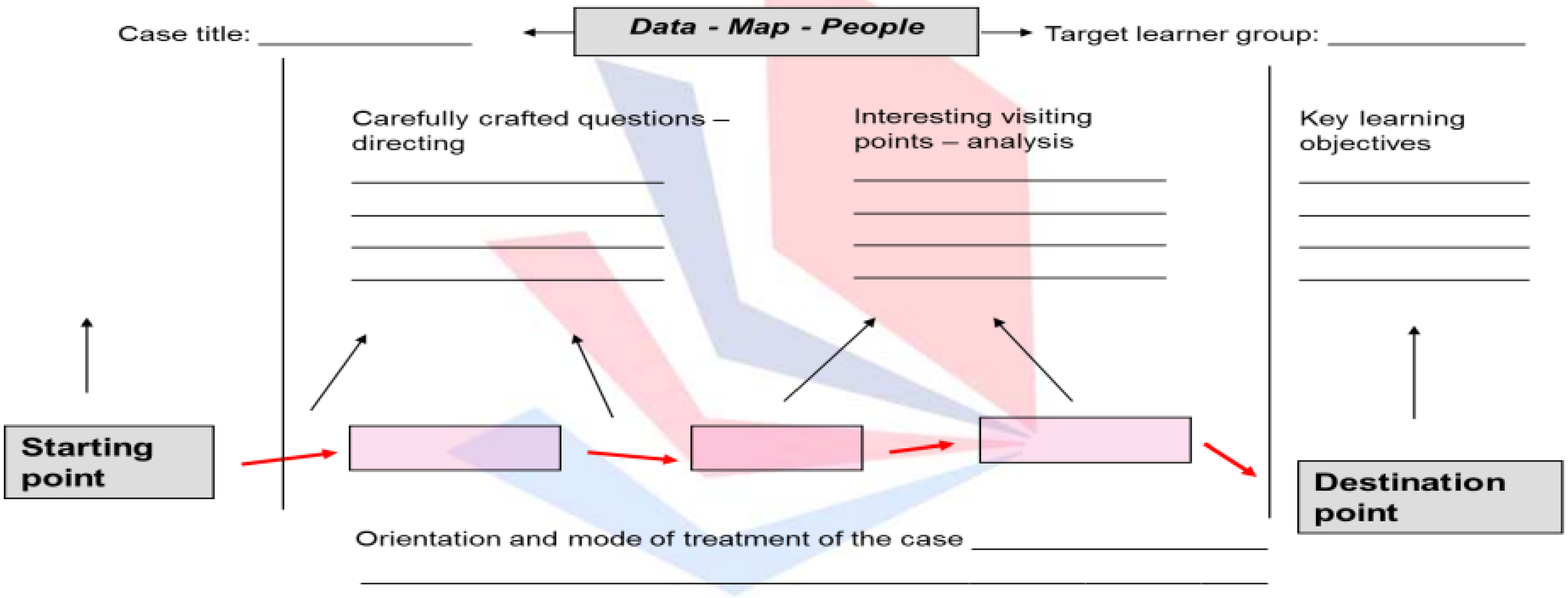
Case teaching plan



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