

# Case Method and Integration of Academic Activities



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# Overview

- What is the case method?
- Pedagogy
  - Different types of case study and how they are used
  - Facilitating case discussions in the classroom
  - Measuring case method learning outcomes
- Writing case studies
  - Steps in developing authentic case studies: from recruiting sites to publication
  - Publishing case studies
- Broader impacts
  - Case method: impacting the individual and institution
  - Opportunities for funding case method projects

# WHAT IS THE CASE METHOD?

# The greatest strength of the HBS MBA Program (MBA '82)

The case method	34%
The quality of the faculty and what I learned from them	11%
The quality of my classmates and what I learned from them (while in school)	32%
The networking opportunities it afforded me after I graduated	14%
The location and facilities it offered	2%
Other	8%

# Focus: Discussion Cases

- Expose participants to realistic situations
- Encourage higher order learning
- Provide a structured forum for sharing participant experiences

# Shugan (2006, p. 113-114)

- **First, the Socratic case method is extraordinarily effective for teaching many skills (e.g., applying written law); however, it is ancient and inferior to the scientific method...**
- **Second, the case method weakens the link between research and classroom, removing critical incentives for relevant re-search...**
- **Third, surrendering teaching to those with little knowledge of the vast marketing literature cuts the quality of marketing education...**
- **Fourth, the case method can teach false confidence...**
- **Fifth, we could lose our best students. Better students, who have already acquired analytical thinking skills and confidence, might seek more scientific content and technical training...**
- **Sixth, some great research might never reach the classroom because translating it into the case-method format is too challenging...**
- **Seventh, the case method rarely exposes students to the latest tools for making better decisions...**

# Implicit Assumptions

- 1. Equates the case method with the Socratic Method**
- 2. Assumes that a case study developed for discussion is not a product of research.**
- 3. Asserts that the quality of a marketing education depends on the amount of knowledge of the vast marketing literature that has been acquired.**
- 4. Expects that the case method causes students to develop excessive confidence, presumably as a result of their ability to come up with the “right” answer.**
- 5. Speculates that our best students will be drawn towards the scientific and analytical approaches he prefers.**
- 6. Asserts that great research can be too analytically demanding to be suitable for the case method.**
- 7. Assumes that useful research mainly flows from academia to practice, as opposed to moving in the opposite direction.**

## **II. CASE METHOD PEDAGOGY**

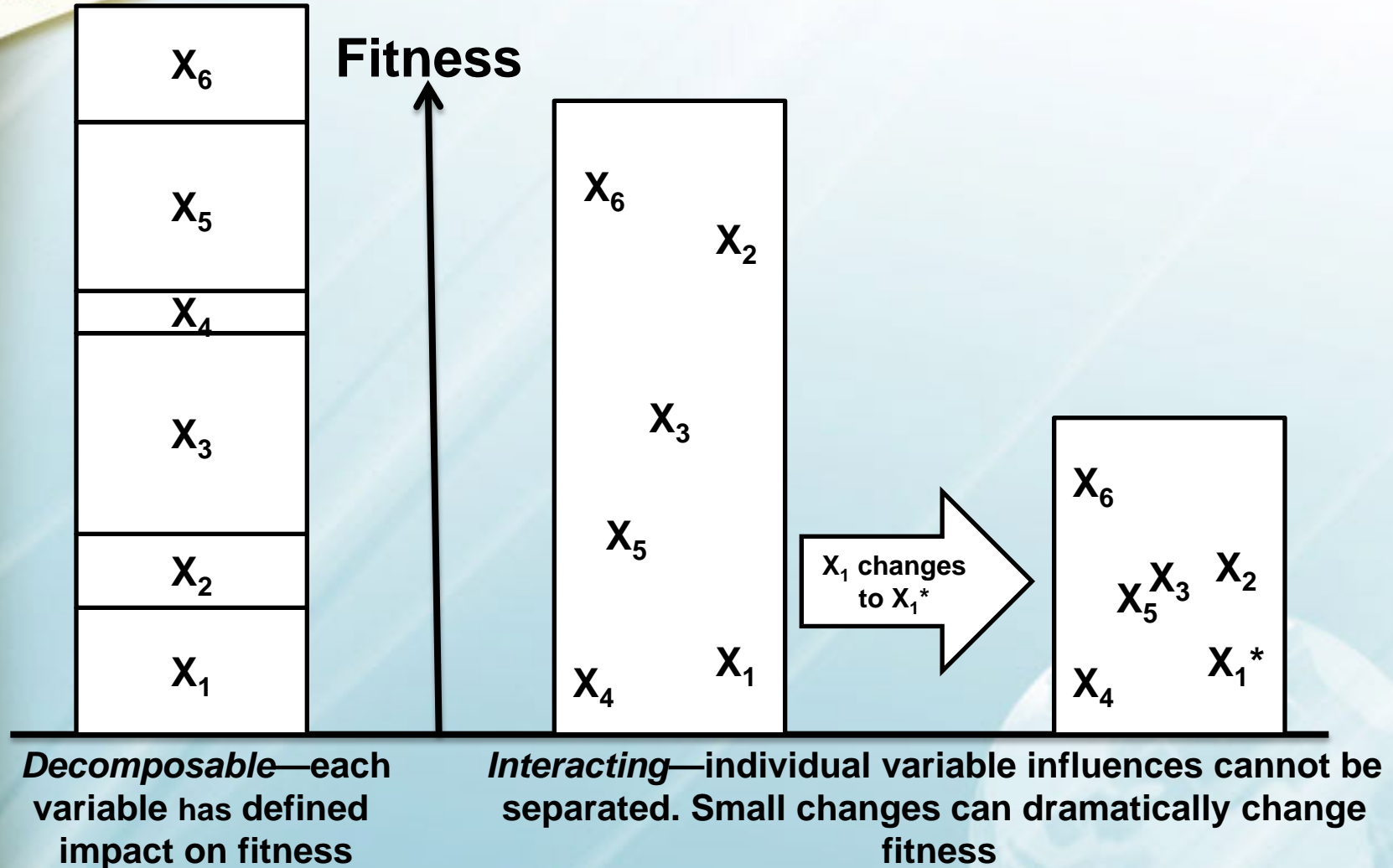


**10 MINUTES...**  
**SKIM THREE LITTLE PIGS A,B,C**  
**ANSWER “SUITABILITY” FORM**

# Sources of Complexity



# Decomposable



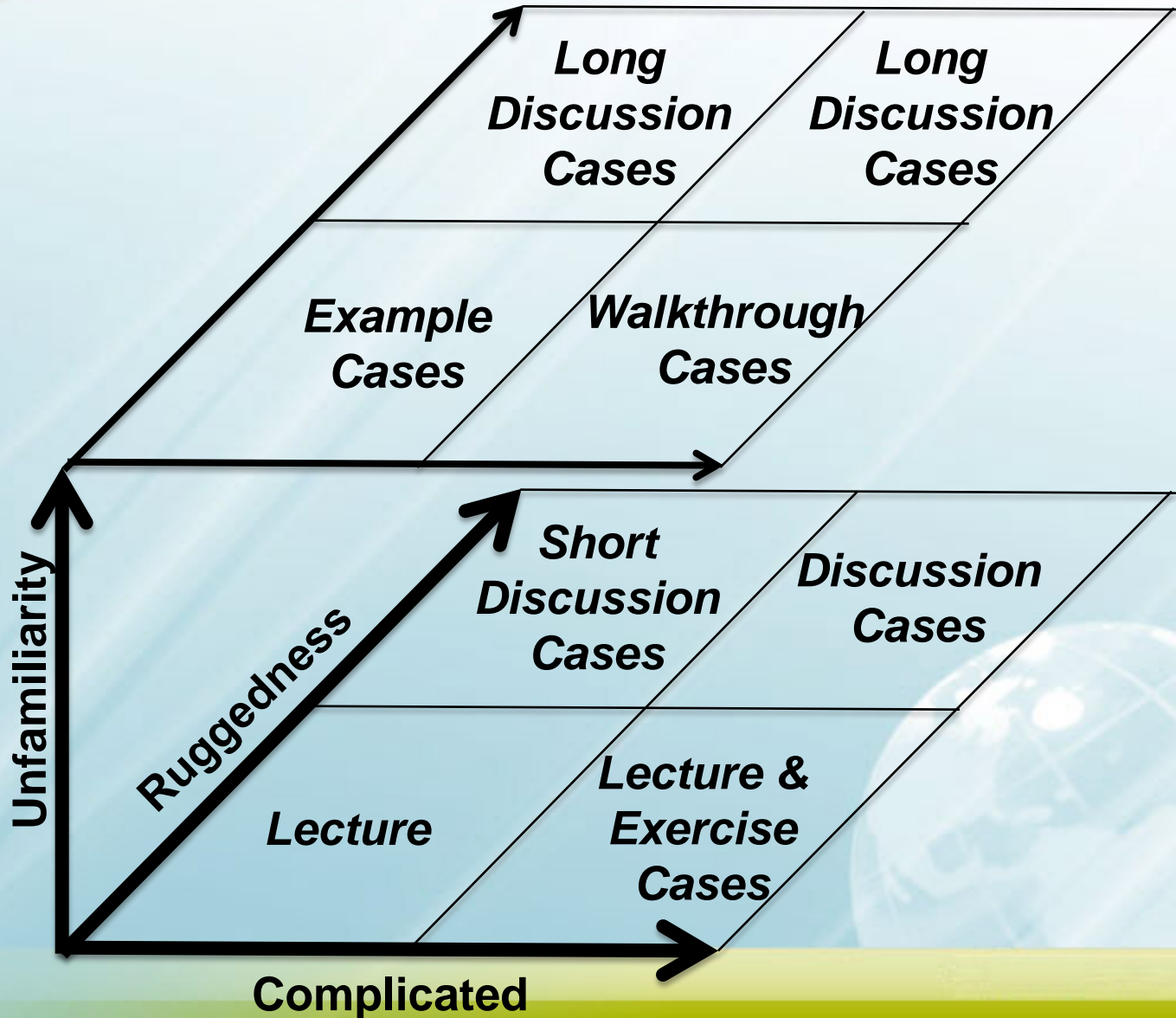
# Non-Decomposable → Rugged

- Question: What should we be striving for?
- Analogy: A cookbook
  - Each recipe represents a peak
  - Before you start cooking, you need to know what you are hoping to produce
- The greater the complexity, the greater the number of peaks
- Role of uncertainty: we don't know good each peak is...

# Types of “Teaching” Cases

- **Discussion:** Focuses on unmade decisions
  - *Long:* Provide full context
  - *Short:* Provide decision without much context
- **Example:** Tells a story about cause and effect
  - Also basis of research cases
- **Walkthrough:** Provides a rich problem solving context used to guide students through a process
- **Exercise:** Provides a rich word problem

# Mapping Domain to Cases



# Cases and Problem Solving

## Bloom (1956)

### Bloom's Taxonomy

Knowledge

Comprehension

Application

Analysis

Synthesis

Evaluation

## Newell & Simon (1973)

### IDC Framework

Intelligence

Design

Choice



# **II.A: CASE METHOD IN CLASSROOM**



# Typical Protocol in My Class

- (*~2 hours: Students prepare case before class*)
- 25 minutes: Pre-case question
- ~10 minutes: Cold call opening
- ~60 minutes: Facilitated discussion
- 15 minutes: Post case questions
  - Three most important things learned
  - How did discussion change my views?

# Key points

- Most of the learning takes place during the discussion
  - Participation needs to be heavily weighted
- Students learn not to seek “the right answer”
  - There are many plausible solution combinations in rugged landscapes
- Student diversity is ***beneficial!***

## **II.B: EVALUATING LEARNING**

# Evaluation

- **Judgment is hard to measure**
- Things we are trying
  - NSF CAT Instrument
  - Our own instrument based on mini-cases
- Student evaluations
- Direct observation
  - Pre- and post- case reports
  - **Exercise:** Pick a number between 1 and 34

# III. CASE WRITING



**EXHIBIT 1: FAQ**  
**EXHIBIT 2: CASE CHECKLIST**  
**EXHIBIT 3: SAMPLE RELEASE**

# Publication Opportunities

- Example and exercise cases: ***National Center for Case Teaching in Science***
  - <http://sciencecases.lib.buffalo.edu/cs/teaching/publications/>
- Discussion Cases in IT & MIS
  - ***Journal of IT Education: Discussion Cases***
  - ***Journal of IT: Teaching Cases***
  - ***North American Case Research Association (NACRA)***
  - ***European Case Clearing House (ECCH)***
  - Various conferences

# VI. BROADER IMPACTS

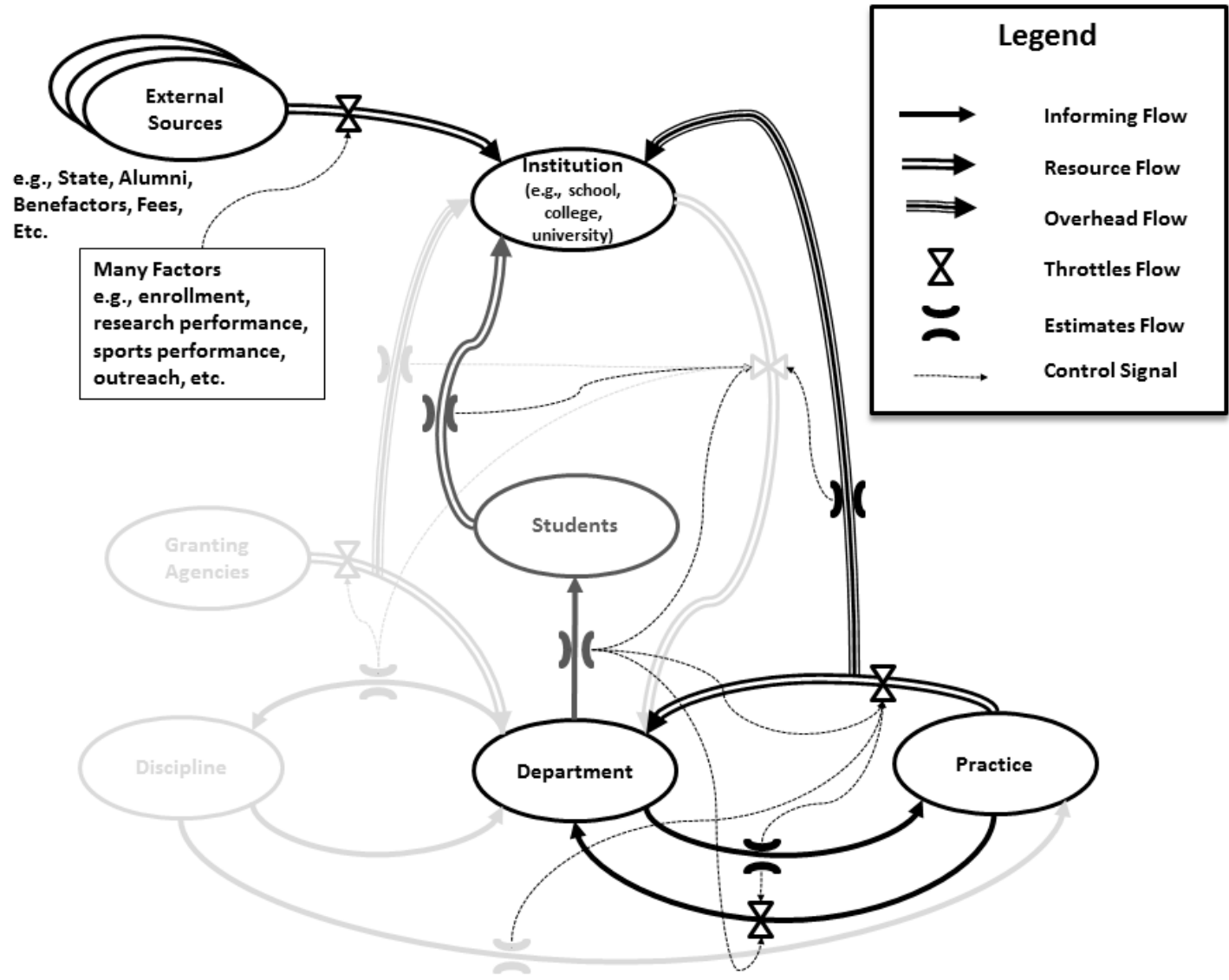




# HBS Formula

- Faculty write cases on companies
  - Case research ends up in classroom
    - MBA
    - Executive
  - Collaborative writing with other disciplines, e.g., medicine, engineering, sciences
- Companies extend case writing engagements
  - Consulting opportunities
  - Research sites
  - Board opportunities
- Bottom Line
  - Research → Practice → Research...
  - Research → Classroom → Practice...
  - Business → Engineering, Medicine, Science...

# Challenge: Even at HBS, cases are not always treated as research...



# Since June at USF...

- Multidisciplinary team assembled
- 10 new cases developed, journal launched
  - Research → Practice → Research
- 9 protagonists sat in on discussions
  - Practice → Classroom → Practice
- One student hired by case site, one collaborating on developing website
  - Classroom → Practice
- One site asking about making donations
  - Practice → Institution(?)
- NSF funding supports USF's strategic plan
  - Research → Institution

**BOTTOM LINE:  
DON'T VIEW A DISCUSSION  
CASE AS THE SIMPLE  
PRODUCT OF CASE WRITING!**

**THE RESEARCH BENEFITS OF  
WRITING A CASE ARE FROM  
THE PROCESS, NOT THE  
PUBLICATION**

# Opportunities: see Grandon.com

## Grandon Gill's Website

---- Launch Login Site ----

*Loads slowly, looks ugly, content overload...What's not to like?*

<a href="#">Main</a>	<a href="#">Favorites▼</a>	<a href="#">Blogs</a>	<a href="#">Publications▼</a>	<a href="#">Case Project</a>	<a href="#">Research</a>	<a href="#">Surveys</a>	<a href="#">Calendar</a>	<a href="#">Personal</a>
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### External Links

Informing Faculty Repository  
JITE: Discussion Cases  
NSF Project Award Summary  
NSF TUES Page

### Conference Links

IREPS 2012  
isAISE 2012  
InSITE 2012


### Workshop Handouts

Three Little Pigs (A)  
Three Little Pigs (B)  
Three Little Pigs (C)  
Three Little Pigs Assessment  
Bloom and Simon Skills  
FAQ Document for Case Site  
Writing Case Studies Checklist

### MS-Word Handouts

FAQ Document for Case Site  
Writing Case Studies Checklist  
Sample Release Form

### Overview



My current case study activities fall into four broad categories:

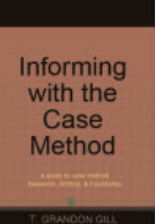
1. Case development for NSF project
2. Launching *JITE: Discussion Cases*
3. Proposing a multi-institutional project
4. Conference outreach

My goal from these activities is to increase the use of discussion cases in MIS, IT, informing science and information science programs. These activities are, and will continue to be, described in greater detail in my blog.

### NSF Project Discussion Cases

2012	<a href="#">eBook or App Case</a>	Sanchez-Murphy, S., Murphy, W. and Gill, T.G.
2012	<a href="#">Nation Technologies Biowrap Case</a>	Agrawal, M.
2012	<a href="#">Pathfinders Eureka Case</a>	Gill, T.G.
2012	<a href="#">Wish Farms FireTag Case</a>	Gill, T.G.
2012	<a href="#">Innerscope Research Case</a>	Gill, T.G.
2012	<a href="#">Infinity Computer Solutions Case</a>	Agrawal, M. and Gill, T.G.
2012	<a href="#">Lee-En Chung Website Case</a>	Gill, T.G.
2012	<a href="#">Ism4300 Case</a>	Gill, T.G.
2010	<a href="#">Web Piston: Choosing a New Strategy</a>	Gill, T.G. and Lasa, R.

### Downloadable Case Method Book



**Informing with the Case Method: A guide to case method research, writing and facilitation**  
This book explores the case method, as it applies to both education and research. It discusses how teaching and research cases differ. It also covers the basics of case discussion facilitation. It concludes by exploring the indirect consequences of case development and instruction for an institution.

Downloadable in the following formats:

[PDF](#) of the text version of the book  
[MOBI](#) format, suitable for use on the Kindle  
[EPUB](#) format, suitable for use on the iPad

### JITE:DC Submission Templates

Word Document  
PDF with Comments

### Apply for Account

Apply for Teaching Note Access

### Cases

[Submitting to JITE: Discussion Cases](#) Tue, 20 Mar 2012 17:45:30 +0000  
Journal of IT Education: Discussion Cases (JITE:DC) is a new journal/repository that is about to be launched to provide free, global access to high quality discussion cases in the areas of MIS, information technology, informing science and information science. In the near future, we hope to ...  
[Continue reading →](#)

[Introducing Cases](#) Tue, 20 Mar 2012 13:45:49 +0000  
With this post, I am introducing a new category for my blog: Cases. The objective of these posts is to support a variety of discussion case activities that I am currently engaged in. Activity 1: National Science Foundation Project DUE-1043919 I ...  
[Continue reading →](#)

**Thank You!**

**Questions?**