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The Case-study Method: Applications in Learner-centered Education

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The scope of the method

Using case studies in class becomes more and more common with the increasing need to make students experience real-life situations in which they have to do decision-making and prepare themselves for the uncertainties of the workplace. By allowing students to gain hands-on experience of the real world and shifting the work focus from the professor to the student, the case-study method becomes an efficient tool to the creation of a learner- rather than a teacher-centered education. The student becomes actively involved in the course and is no longer a tacit observer of in-class developments.

The method was first used in law schools in the United States where two parties, the plaintiff and the defendant, were brought to court and law students had to put themselves in the shoes of those opposing sides. Each case had to be solved following the rules of law and the students would develop skills and know-how to solve lawsuits. Then the problem-solving orientation and the staged real-life setting of the method were considered a good training ground for other functional fields such as business and later case studies were adopted in business administration programs.

Thus far, the method has found applications in various disciplines and majors including science (anatomy, psychology, physics, chemistry, ecology, biology, genetics, geology, mathematics, medicine), political science (elections, voting and voting rights, ethics of politics), public administration, business, law, history, sociology, psychology and other social sciences. The wide array of fields in which the case-study method can be used makes it an almost universal tool to education. As a commonplace topic for all these fields ethics, for example, provides for the applicability of the method in them and with some adaptation to the course essence, structure and load the method can be related to almost every sphere of life.

In the fields mentioned topics can range from what causes the greenhouse effect to what happened to the mammoths and the Neanderthals to what are the ethical and economic consequences of industrial espionage. Like every tool to learning the method has its limitations and is not a “universal coat” that fits everybody. It is not suitable for every teacher or course. It may seem inappropriate to use in certain situations, neither can it be used infinitely as the only learning device in a particular subject.

In the European context there could be various case-study applications. The method can largely be used in teaching European law. It is appropriate in the study of a wide spectrum of law courses with relevance to EU – the business law of the EU, the law of the EU institutions, as well as European private law.

Case studies related to European transactions could very well fit into courses such as European Business, International Strategic Management, Business Strategy or Policy and Cross-cultural Management, the scope of which emphasizes European business and culture.

Case studies may also tackle problems related to European political and economic integration both at the micro- and the macro-level. The applications of this tool could be extended to business ethics or the ethics of politics in the EU involving issues such as elections, voting and voting rights.

The framework within which the author has been using the case-study approach is the business environment and the examples that follow mostly refer to truly existing or invented companies. In the context of business the case-study method embodies a simulation of the business world and presents a hypothetical or real-life problematic situation. Resembling real firms case studies deal with problematic issues and areas in companies – some of them real firms disguised under invented names. The major didactic goal of the case-study method is to develop problem-solving skills in business students and they are often told that in reality problems are there to be solved. In this sense, it is worth mentioning that case studies lacking problem orientation do not represent a challenge to the students and are not likely to aid the learning process. In a perfect situation there is no reason for students to try to change the status quo. Reality, however, dictates somewhat differently.

The problem identified

Undoubtedly, case studies vary substantially as to the degree of harshness and suddenness of the problem they contain – some are cases about very well doing companies experiencing mild problems that all of a sudden are threatened to go out of business and some introduce firms with serious long-time problems for which the application of crisis management is mandatory. The severity of the problem puts students in different situations and roles and requires them to develop adequate knowledge for handling all kinds of problems.

The most common error made in case-study analysis is attempting to recommend a course of action without first adequately defining or understanding the problem. Whether presented orally or in a written report, a case analysis must begin with a focus on the central issues and trouble areas represented. There is a common error to detect symptoms rather than the real problem. Assuming the problem was not identified properly, there is the danger of either solving the wrong problem or not solving the problem correctly.

At the first stage of problem definition it is the role of the professor to introduce students to the case-study method, assign roles (voluntarily or involuntarily chosen by students), form the teams, provide guidance to them and facilitate their work. It should be clear from the outset that the professor is more of a facilitator than an instructor when using the case method. His burden is much bigger at the initial stage when students know little or nothing about the method and about what they are expected to do. Before their first case students have rarely been exposed to teamwork, have not made in-class presentations and have hardly acted as decision makers. Therefore, it is a common situation that initially students lack the confidence and self-esteem to perform unusual tasks like case studies. It takes them some time to assume the roles they were given. It is the major obligation of the professor at this point to articulate the “algorithm” of a case study – its format, rules, and criteria. Then students simply have to follow those rules. The set format or algorithm of the method, once the professor has properly articulated it, allows for a robust grading system, tangible results and strict criteria of evaluating student performance.

The next step in dealing with case studies is developing several, usually three or four, plausible strategies for solving the problem of the case, once the team has identified it. The teammates should formulate several alternatives and analyze the advantages and disadvantages of each as a feasible solution to the problem of the case. The team should reveal the shortcomings and virtues of the paths the company may take on, if in reality. While the method fosters

student's logic and creative thinking, it allows experimentation in controlled laboratory conditions, something students will not be exposed to at the workplace. In many businesses the student starts learning on the spot but more often than not the mistakes he is prone to, may be punished and may even be crucial to one's career (imagine the profession of a stockbroker in which only one mistake can cost you millions of dollars or your career). The case-study method provokes student thinking and analytical capabilities and is, therefore, a major instrument to developing such skills in a learner-centered world.

This basic talent is accompanied by the need to bear the responsibilities of decision-making. Not only is thinking necessary, but also strategic thinking capabilities are what the student should acquire. As students will become future formal or informal leaders they have to be prepared for making and formulating strategic rather than operational decisions. Strategic case studies give them the expertise to operate efficiently in the role of company managers or people in high positions. Cases, thus, allow marking long-term plans and strategic paths for organizations.

A collaboration effort

In the decision-making process students do not work independently. Rather, the decision is a result of the mutual efforts of an entire team of 4 or 5. Forming teams of 6 and more students is not desirable since it makes decision making difficult, while students in a larger group have difficulties meeting, discussing and reaching a consensus on their future strategies.

The challenge posed by the case-study method in teamwork is the development of relevant collaborative skills and abilities. While a great number of students are individualistic and prefer to work on their own, business reality dictates that they be able to cooperate with others in a sophisticated and often stressful environment. At the workplace it is the superiors or the subordinates we have to consider and working with people sometimes seems to be the most difficult thing. Cooperating with others at the same time should be a skill that evolves gradually and, therefore, is not enforced on students. It is the author's feeling that students should not be forced to join teams and that teamwork can greatly be encouraged with the help of academic freedom. A counterargument could be that the real world differs from this and that one rarely chooses his peers, bosses, department and, why not, company. Even if one chooses, there

are always inconveniences resulting from the dynamic changes occurring in firms. However, the academic field allows for more democracy and the case-study method permits students to do their best once they have chosen their own teammates.

After they have selected each other in the team, they take on tasks that become a common responsibility and can only blame themselves for not having made the best choice of peers. If any of the team members is not performing at his best, then it is the responsibility of the others to compensate for his lacked contribution. Liberty in selecting partners helps fight back one of the major criticisms to the case-study method, the fact that there is uneven distribution of workload and tasks among group members. Students do learn from their mistakes and they are unlikely to repeat those mistakes in their future cooperative work.

A drawback to the method is the danger of groupthink, a situation in companies led by group mentality usually based on what the most authoritative figure thinks. Having a leader in each team is good and the case-study method does encourage leadership talents. But having a wrong “messiah” on the team may be detrimental to its success. The student who is presumably the smartest and the most convincing one can really lead his classmates into a dead end.

Nurturing students’ collaboration is most challenging when dealing with students of different nationalities. The atmosphere in a multinational team very much resembles the atmosphere in a multinational company and the experience students gain interacting with aliens is most valuable in the future when they will operate in such firms. The observation is that a lot more could be done to make cross-cultural or cross-national teams work efficiently by building more bridges among students of different nationalities and teaching them about cross-cultural differences which have a true meaning in the context of international business.

In search of the answer

It is a widely spread notion that each case has one correct solution and students have to dig for it. Sometimes they feel like the professor knows the answer and their charge is to guess what that answer is. The truth is quite often case studies can be solved many different ways. Limiting the students to

the only possible strategy or solution is a very narrow-minded way of implementing the method in the class work. Rather, the task of the professor is to make students look at the case from many different perspectives and give an elaborate and explorative solution to the existing problems. In this sense, not only they have to try to solve the major problem of the hypothetical organization, but also the minor ones. Stating all the little details of how they will implement the strategy they have adopted helps students provide argumentative and convincing answers as to why they think that strategy is the best.

At this stage the professor should be looking for a persuasive analysis of what would occur if the best alternative were chosen and the consequences of it. This requires students to prepare a new situational analysis and try to picture future developments. A real danger for them is to start rehashing the case information – instead of analyzing and interpreting facts and suggestions they may repeat those facts. Professors should welcome innovative, even extraordinary ideas because sometimes what may seem like a very weird idea may be quite an appropriate one. Badly solved cases contain too long an introduction or too short a solution. The implementation part should include all the steps that the team envisages to undertake.

In search of the answer students often complain that there is too little information in the case, that they find irrelevant some of the information or that they have to bring in additional facts from Internet sources. If the firm is disguised or is non-existent, there are hardly any ways to find additional data. If the firm is a real one, some answers can easily be found through the Internet. The author believes that students should be discouraged to use sources like the Internet where they can pool information without giving it much thought. Additional searches can be very fruitful and harmful at the same time. Real business managers often have a limited knowledge of the environment and by providing a particular set of data to the students we give them the scenario on which they have to act. And it could be that particular students are exposed to more information than others.

The amount of work that teams have to do may turn out to be significant. Depending on the case and the student cohesiveness they have to meet several times during the semester to interpret and solve the case. They also have to find a way of distributing the work among themselves – both in terms of a written report and an oral presentation. The case study may become a mutual written and oral effort.

Grading and limitations

Once the professor has set strict grading criteria, it becomes really easy to evaluate student performance on a case study. Naturally, the grade is a team reward and this makes some students better off while harming others. This tradeoff is partly offset by the freedom of students to choose one another. But each professor has to have vigorous grading criteria as to the format of the analysis and presentation, the way the relevant steps of the method are followed, the elaboration of the solution and its implementation. With regards to this the professor expects to receive an answer why the particular alternative strategy was chosen among all, what makes it so attractive and what are the specific ways in which it will be carried out. The professor should receive convincing, well-thought and creative answers. He should not look for the single “correct” answer but rather for one that is suitable in the situation given and is well defended by the group. Hence, a major characteristic of the case-study method is there is never one correct answer and professors should bear that in mind when grading students.

Like every teaching tool the case-study method cannot teach students everything. The method can very well be used in addition to class lectures, since it centers the attention on the student. In the length of a semester course both the teacher and the students can easily get bored with each other and the case-study method allows students to get involved in the class work more than in a trivial lecture. But using solely case studies may also bring repetition and fatigue in the classroom. Having a student do three major case studies in three different teams for our course may put too much burden on the student and may not be the most efficient way of learning. Every professor should look to optimize the uses of this tool and adapt it to his class needs.

Another limitation to the method is related to timing. Some teams have less time to prepare and present their cases in class due to schedule restraints and others have more time. A good option is to reward students volunteering to do early cases by imposing less stringent requirements on them.

Meanwhile, what seems like a scheduling deficiency of the method to be used in the course of a semester may, in fact, be an advantage – case studies are assigned and groups are formed well in advance and students know ahead of time who they will be working with and what problems they will have to solve. This gives teams more thinking and cooperation time. Teammates are

able to plan meetings during the semester and discuss issues as many times as they find necessary.

A major defect of the case-study method is its inability to divide the tasks and responsibilities evenly among team members. The case is a team effort and, thus, students do the distribution of work themselves, which leaves them with the responsibility of organizing work and promotes their organizational skills. But, nevertheless, there is always a chance that some people in the team do more than others, while the grade is a shared one.

A wrong tendency would be to select cases that have little relevance to the theme of the course and miss the course focus. It is to the discretion of the professor to determine what issues should be treated in the course but cases should be considered carefully so that they meet the goals of the discipline. As stated in the introduction there are ethical dimensions to many spheres of life and preparing ethical students can be a good starting-off point for a course. This is especially true for the business environment but is not only limited to it.

It could be that depending on the number of cases assigned some of them are not read by all the students. It is impossible to receive input from non-presenting students who have not read the case, while it may be that only the presenting team has read it. Involving the class audience into the discussion is a major challenge before the professor.

It should not be forgotten as well that no matter how realistic, the case study is still a hypothetical case and, therefore, it reveals ideal rather than real conditions. Lacking an entirely authentic setting, the method is still good to use in conditions in which it is hard to organize practically oriented instruction. Being in the classroom, one can do little to obtain practical skills.

Groupthink is another potential threat to solving case studies successfully and the group may be jointly led into the wrong direction. There is the risk of erroneous group mentality and logic and it may be that two people do not always think better than one. A less confident student who proposes a good strategy may be “suppressed” by others feeling too confident.

Professors should, therefore, be aware of all the potential risks and weaknesses of the case-study method when deciding to implement it. Knowing what a powerful tool we have to learning, knowing its imperfections as well as its diverse uses, we can productively apply it in an education centered on the learner, not on the teacher.

Useful links:

European Case Clearing House

www.ecch.cranfield.ac.uk

National Center for Case Study Teaching

<http://ublib.buffalo.edu/libraries/projects/cases>

XanEdu

XanEdu.com