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)

<table>
<thead>
<tr>
<th>The case method</th>
<th>34%</th>
</tr>
</thead>
<tbody>
<tr>
<td>The quality of the faculty and what I learned from them</td>
<td>11%</td>
</tr>
<tr>
<td>The quality of my classmates and what I learned from them (while in school)</td>
<td>32%</td>
</tr>
<tr>
<td>The networking opportunities it afforded me after I graduated</td>
<td>14%</td>
</tr>
<tr>
<td>The location and facilities it offered</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
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</tbody>
</table>
Focus: Discussion Cases

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

• 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

It's unfamiliar...

Lack of Structure

The nature of our goal

It's not decomposable (rugged)...

The path to our goal

It's complicated...
Decomposable—each variable has defined impact on fitness

Interacting—individual variable influences cannot be separated. Small changes can dramatically change fitness
• 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

- Lecture
- Lecture & Exercise Cases
- Short Discussion Cases
- Walkthrough Cases
- Example Cases
- Long Discussion Cases

Dimensions:
- Ruggedness
- Unfamiliarity
- Complicated
<table>
<thead>
<tr>
<th>Bloom (1956)</th>
<th>Newell &amp; Simon (1973)</th>
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</thead>
<tbody>
<tr>
<td><strong>Bloom’s Taxonomy</strong></td>
<td><strong>IDC Framework</strong></td>
</tr>
<tr>
<td>Knowledge</td>
<td>Intelligence</td>
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<tr>
<td>Comprehension</td>
<td>Design</td>
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<td>Application</td>
<td>Choice</td>
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<td>Analysis</td>
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<td>Synthesis</td>
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<tr>
<td>Evaluation</td>
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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
Publication Opportunities

• Example and exercise cases: National Center for Case Teaching in Science
  – [http://sciencecases.lib.buffalo.edu/cs/teaching/publications](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 teak 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

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

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<thead>
<tr>
<th>Year</th>
<th>Case Study</th>
<th>Author(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>eBook or App Case</td>
<td>Sanchez-Murphy, S., Murphy, W., and Gill, T.G.</td>
</tr>
<tr>
<td>2012</td>
<td>Nation Technologies Biowrap Case</td>
<td>Agrawal, M.</td>
</tr>
<tr>
<td>2012</td>
<td>Pathfinders Eureka Case</td>
<td>Gill, T.G.</td>
</tr>
<tr>
<td>2012</td>
<td>Wish Farms FinkTag Case</td>
<td>Gill, T.G.</td>
</tr>
<tr>
<td>2012</td>
<td>Innercore Research Case</td>
<td>Gill, T.G.</td>
</tr>
<tr>
<td>2012</td>
<td>Infiny Computer Solutions Case</td>
<td>Agrawal, M. and Gill, T.G.</td>
</tr>
<tr>
<td>2012</td>
<td>Lea-En Chung Website Case</td>
<td>Gill, T.G.</td>
</tr>
<tr>
<td>2012</td>
<td>Ism4300 Case</td>
<td>Gill, T.G.</td>
</tr>
<tr>
<td>2010</td>
<td>Web Pison: Choosing a New Strategy</td>
<td>Gill, T.G. and Lasa, R.</td>
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Downloadable with the Case Method Book

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
Thank You!

Questions?