

Introduction to Case Pedagogy

Objectives of the session

- **Part I**

- What is the case method?
- Analyzing cases.
- How to prepare and discuss cases?
- What causes reluctance to participate?
- Suggestions

- **Part II**

- Case example: Kanpur Confectioneries Private Limited (A).

Part I

What is the case method?

- A case usually provides a straightforward narrative, and when we finish reading it, we should ask some basic questions:
 - What is the case trying to communicate?
 - Is it making any sense, or trying to make a point?
 - What am I required to do once I have finished reading the case?

- Cases usually end with some possible answers, but they won't typically tell which the writer or protagonist think is the best solution.
- You are entitled to your own opinion. The instructor will normally **not** step in and resolve any disagreement or conflict.
- You don't have to defer to the professor or other participants as long as you back your opinion with facts and fact-based inferences and calculations.
- The main aim is to **practice thinking**.

How is case base teaching different from lecture-based teaching?

- Lectures are experts delivering content to many individuals at once.
- The lecture model is good for transferring information.
- Lectures can teach the participants **what to think** but **not how to think**.
- Lectures provide theory, frameworks, concepts, facts, formulas, and expert opinions about a subject.
- However, in real-world situations – in business – what isn't sufficient. You must know how to apply the knowledge in the real world. For that, you need to practice in situations that are similar to those you will actually encounter.

How is case base teaching different from lecture-based teaching? **What vs How**

- Let's say you are a graduate who took accounting classes taught by lecture method.
- In your first job, you are asked to evaluate the organization's accounting system.
- In university/college, you had lectures on different types of accounting systems, but you were never asked to analyze, on your own, a real-world accounting system and its fit with an organization.

- One area of education has always recognized the importance of both what and how – **Medical schools**.
- The lecture method doesn't generally give students the chance to practice.
- In the case method, you use the knowledge you have learned to come up with your own answers (with guidance).
- The method allows for answers that are objectively wrong or dubious because they are part of learning.
- The case method allows you to make mistakes and learn from them.

Skills for the case method

- You need three distinct sets of skills
 1. You need to be able to read a case and give it meaning in relation to the key issues or questions that you have been asked about it.
 2. You have to be able to communicate your thinking effectively in a class discussion.
 3. You must be able to write a persuasive response to a question about a case.
- Reading, discussing, and writing about cases all involve the application of **knowledge** to the situation described in a case. What does knowledge mean?

- **Knowledge** means your work experience and also the knowledge you learn in different courses.
- The case method of teaching is designed to build the concepts of **KASH**:
 - Knowledge,
 - Attitude,
 - Skills, and
 - Habits.

Analyzing Cases

- Educational texts represent reality as logical and coherent. They can make a complex situation that surprised everyone, including experts, and affected millions of people around the world appear to be the logical outcome of well-defined causes. One extreme example is the financial crisis of 2007-2008. Few people saw it coming.
- We can learn from the study of past events. In real-time, however, real-world situations have islands of useful data, observations, and reference points but, to participants, are often fluid and chaotic, have a large degree of uncertainty, and are difficult to understand.

- To practice using knowledge in actual situations, you need some way of immersing yourself in both the available facts and the fluidity of uncertainty that characterize the real world. That's what cases are for.

What a case is, what it does, what it doesn't do

- A business case imitates or simulates a real situation.
- Cases can also be collections of articles, multimedia content, or a variety of other types of content.
- The subject of cases varies enormously, from a single individual or organization to an entire nation.
- All different forms of cases have a common purpose: to represent reality, to convey a situation with all its crosscurrents and rough edges.

- A case typically has four characteristics:
 1. A significant business issue or issues
 2. Sufficient information on which to base conclusions about the issues
 3. No objective conclusion – in other words, no explicit or implied right answer.
 4. A non-linear organization.

Sufficient information

- Cases can also include information that serves as noise to distract you and makes it harder to distinguish useful information.
- Today, we are awash in information, and cases can provide invaluable practice in filtering information according to its relevance and value to an issue.

No objective conclusions

- Cases describe situations in which people have differing opinions.
- Characters in the case may express strong opinions, but you need to consider their views alongside those of other characters and other information in the case.
- You, the reader, have to decide on a conclusion, as you do in real-life situations.

Nonlinear organization

- Cases seem to have a logical structure.
- However, business cases are typically nonlinear, meaning the content is not presented in the most logical way.
- Information on a single topic is scattered among different sections in a case.
- Case exhibits are often designed in a way that makes it difficult to extract high-value information.
- They can also have significant gaps in information.

- When you read a case for the first time, pulling a highlighter across the page may feel like you are doing something, but it's an illusion.
- With cases, you need to change how you read and, ultimately, how you think.
- Cases are jigsaw puzzles with the pieces arranged in a confusing pattern.
- You need to be comfortable with less-than-perfect information and irrelevant or relatively unimportant information.

Techniques for making meaning from the cases

- Recognizing the **main issue** in a case that needs solving and the most efficient way to go about investigating it.
- Reading the case **actively** and **efficiently** to provide a basis for your analysis of the case
- Following a path of analysis to arrive at an **evidence-backed** conclusion about the main issue.

- Most cases illustrate one of three core scenarios:
 - The need to make a critical *decision* and potentially persuade other characters in the case to accept it.
 - The need to perform an in-depth *evaluation* that lays out the pros and cons or strengths and weaknesses of the subject of the case.
 - The need to perform a comprehensive *problem diagnosis* that identifies the root cause of a problem described in the case.

How to prepare and discuss cases?

- Class discussion is the fulcrum of case learning.
- You and your classmates come together to explore a case with the help of the instructor.
- *The instructor's role isn't to tell you what the case means and give you the right answer.*
- Case discussion is a rehearsal for your career: thinking on your feet, discussing issues with peers and superiors, persuading them to accept your point of view and following through with actions that flow from your viewpoint.

- In the case method classroom, instructors give up a great deal of control to participants – i.e., you.
- In turn, though, you have to take much more responsibility for your own learning than you do in a lecture classroom.
- Like orchestras or any musical group, the quality of case discussions can vary. With so many variables, that's a given.
- *The conductor (professor) and the orchestra members (students) must have an understanding that they will all study the composer's notes (the case) seriously before a performance. Otherwise, the performance will disappoint everyone.*

What role you can play or you should play?

- Curious bystander
- Decision maker
- Analyst
- Consultant
- Reporter

The shape of a case discussion

- Below is a glimpse of what a case discussion is like.
 - The instructor may provide some background or context for the case, or she may start asking questions immediately.
 - Case method professors generally have a class plan divided into discussion blocks, each one concerned with a specific issue.
- Let's see two ways a case discussion can be initiated by the professor(s).
- For example, an operations case begins with the main character thinking about an innovative distribution system his company has implemented.
- He's convinced that it will allow his company to manufacture products more efficiently. However, other parts of the supply chain are resisting innovation.

- **First way**

- The instructor might first ask the class for the facts about the supply chain, how the prior system operated, how the new system is supposed to work, and its benefits for the manufacturer.
- The professor might then shift to questions that require the students to draw conclusions from the facts: What are the causes of resistance to innovation? Can the system be fixed, or is it fundamentally flawed?

- **Second way**

- The professor might start with big-picture questions such as, Why is the new system failing? Should the main character give up trying to make it work? The ensuing discussion might work backwards from students' answers to the big-picture questions to the facts and inferences that support their opinions.
- The educational purpose of both ways is the same: to challenge you to understand the factual evidence, to justify your opinions with evidence, and to express your thinking coherently and persuasively.

Responsibilities of a case method students

- Be prepared
- Take part in the discussion
- Extend respect and expect it in return
- Accept conflict as a natural part of a collaboration

Be prepared

- In the case method, it really does matter that you do your homework. There is no way to catch up or benefit from the learning opportunities of the case classroom after the class is over. You not only should read the case but also should take time to think about it.
- *Preparation for the class is not complete till the participant has written down his/her decisions and the supporting arguments for the decisions.*
- Your professor may organize study groups to discuss cases before class. If she doesn't, you can organize one of your own.

Take part in the discussion

- Case discussion depends on two variables: your preparation and your willingness to raise your hand.
- In addition, you should bring your real-world experience to bear on the case.
- You and your classmates have a brief time together. Be generous and add your unique perspective to the case discussion.
- Respond to the question asked, not the question you might want to answer. Answers to questions that were not asked disrupt the flow of a class.

- Don't assume that you learn a lot by staying silent and taking copious notes.
- You learn by engaging your thought process with those of the other people in the room and expressing the specifics of your agreement, disagreement, or your qualifications to what others have said.
- **Without skin in the game, you won't learn from the game.**

Extend respect and expect it in return

- Google found that the single most important characteristic of its highest-functioning teams was psychological safety.
- Members of these teams felt that the team wanted to hear their ideas and were confident that the other members would take their ideas seriously.

- Respect in the case classrooms flows from the following:
 - You take seriously what your peers say.
 - When you disagree with your peers or the instructor, you do so **constructively**. Your interest is in understanding an issue better, not proving that you are smarter than everyone else.
 - When someone disagrees with you, you regard it not as a personal threat but as an opportunity to examine your thinking from another point of view.
 - You don't try to dominate the discussion.
 - You listen attentively to other students and the instructor.

Accept conflict as a natural part of a collaboration

- An idealized picture of a case discussion has students progressively building on each other's views. Everyone chips in with a comment that adds to the emerging view of an issue.
- However, collaboration doesn't imply that everyone agrees about everything. Conflict is essential to collaboration because it opens up possibilities that wouldn't exist without it.
- It needs to be managed so that the conflict is constructive rather than destructive and personal.

- Conflict itself isn't a crucial issue; *it's what people do with the conflict.*
- They can defend their point of view unconditionally. Or they can talk about the substance of the conflict.
- In case discussion, it isn't always necessary to resolve the differences of opinion. The important objective is that everyone in the room understands the basis for the different points of view.
- If you hear something offensive that the professor did not hear or while engaged in discussion with another student, let the professor know. She can't fix something if she doesn't know there's a problem.

Reluctance to participate

- Ideally, everyone in a class is eager to discuss a case. In reality, students can be reluctant to contribute their thinking. Here are some of the most common reasons.
- **I didn't prepare the case:** You may mistakenly think of preparation as something you're doing for the instructor. In fact, you are preparing a case for yourself and your future. That may seem like a cliché, but it's true. **Learning happens in small steps, not huge leaps.**
- **I'm afraid of speaking:** It takes courage to speak while everyone's attention is focused on you. What is the worst thing that could happen if your comment is off the mark? Nothing

- Does every other student always make high-quality comments? Does the instructor always ask clear questions that move the discussion in a productive direction? The realistic answer to both questions is no. So don't worry, just speak. You may feel butterflies in your stomach, but that feeling will subside after a few attempts.
- **I'm the only one who's uncomfortable:** This simple answer to this assumption is that it's wrong.
- **I need to say brilliant things:** It is a trap set by those unrealistic expectations of yourself that prevent you from speaking. Insight can come from individuals, but it's more likely to develop from the hard work of groups.

- **People will think I'm stupid when I make a comment:** All of us experience self-doubt. If you're afraid of being perceived as stupid, ask a trusted friend in the class to give you feedback on your discussion participation. Either you will hear that your comments are intelligent, or you will receive suggestions on how to improve the impact of your comments.
- **I'm afraid someone will disagree with me and show everyone that I am wrong:** You might realize that the alternative is a better way of looking at an issue. Or you might show the other participant that your point of view is sounder.

Suggestions

Reducing risk – The right way

Don't be silent:

- Silence is more damaging than comments that misfire. As Maureen Walker, a former administrator at Harvard Business School, notes, “**Silence is saying something.**”

Put limits on your preparation:

- Careful preparation is the foundation for effective class participation, but you **shouldn't overdo it**. Balancing preparation and rest is one of the most important contributors to good classroom participation. Put a time limit. Initially, you may need more time to prepare, but you should try to bring it gradually down to 2 hours or less.

Speak up early:

- Participate as early as possible, ideally in the first class. Speaking up early not only reduces the nervousness of being in the spotlight but also assists you in setting realistic expectations for yourself.
- *Class participation itself is a learning process. No one is born to be an effective case discussion participant.*

Remember: You're not on the stage long:

- How long does a student speak in a case discussion class? Speaking for a total of one minute is an unusually long time unless the class is very small. Despite your concerns, your true risk is small.

Learn to listen:

- *Always listen carefully to the other students' comments and the professor's questions. It's not only important to get the essence of different perspectives but also to help you follow the flow of the case discussion (advice of a student).*
- ***Listening is participation, as long as it isn't the only thing you do.***
- A quality comment isn't possible if you haven't been listening with care.
- One has to learn how to listen to a case discussion. Learning to listen well will prove to be one of the most valuable skills you will come away with.

Remember how to laugh:

- *The ability to lighten up is very important. Many students (especially senior students or students from different cultures) are very intense and tense and take themselves too seriously. That makes them stiff in delivery and rigid in responding to audience reactions or comments. Humour, especially the self-deprecating kind, is very much appreciated and often needed. Students' ability to spice up the discussion or laugh at themselves will help them improve audience attention and increase acceptance of their comments. (Advice from a student)*

Should you take notes?

- Take spare notes in class and set aside a few minutes after class to write down the two or three major takeaways. Otherwise, you may miss important learning moments in class.

Be patient with yourself:

- Along with the willingness to take the plunge, you need patience. Don't regard your comments as a vehicle to prove your brilliance.
- Don't be afraid to make obvious comments or ask stupid questions.

Part II

Case example: Kanpur Confectioneries Private
Limited (A)

- What the case is all about?
- What role you should assume?

- What is(are) the decision(s) required?

- How you should analyze the case?

- What did you learn?

Thank you