

Cases in the Classroom: Part C

Leigh W. Cellucci, *East Carolina University*

Cara Peters, *Winthrop University*

Michael H. Kennedy, *East Carolina University*

Woodruff, Eric, *East Carolina University*

Building upon our past “From the Editor” articles that focused on cases in the classroom (Peters, Cellucci, and Ford, 2015; Cellucci, Peters, and Woodruff, 2015), the purpose of this article is to describe the results from the pilot study and focus group conducted at the 2016 Society for Case Research (SCR) Summer Workshop, Kearney, NE. The respondents were professors who were actively engaged in case study research. The findings indicated that they found cases as a useful pedagogical tool for students to apply theory in real-life situations, hone their critical thinking skills and build their ability to work in teams effectively. Focus group recommendations were applied to improve the survey instrument distributed to the SCR membership during Fall 2016. This research was IRB approved.

The SCR Summer Workshop

The Society for Case Research sponsors a summer workshop annually (www.sfcr.org). Typically an SCR member’s university serves as host, and attendees present their cases in small group discussion sessions. Researchers advise one another to help improve case research and writing, and the workshops usually begin on a Wednesday evening and end mid-day on Saturday. The settings are informal, and the exchanges between reviewers and researchers are given in a collegial and supportive environment. Each session lasts 75 minutes and, at a minimum, the author, the scribe, the reviewers and the chair are present.

- The Author—presents an overview of the case and teaching note. The author listens to and discusses recommendations made;
- The Scribe—responsible for typing the comments from the reviewers and reading these comments aloud toward the end of the session to ensure that the advice offered was communicated effectively;
- The Reviewers--responsible for reviewing the case prior to coming to the workshop and offering advice to improve the work; and
- The Chair—responsible for keeping the discussion moving along in a timely fashion, allowing sufficient time for all reviewers to speak, and time for the Scribe to read notes to the group. The group then notes whether it is a “recommendation” for the author to consider or a “must” for the author to address.

Session attendees have received the case and teaching note in advance. Other session attendees may be present during the session; however, they do not have a formal role to play during the time period. Nonetheless, their comments and recommendations made during the discussion are noted as appropriate.

The pilot survey was distributed during a morning session at the workshop with 30 participants attending (for a copy of the pilot study survey, see Cellucci, Peters, and Woodruff, 2015). Participants were asked if they agreed to take the survey and were reminded that they could stop at any time.

Findings from the Pilot Survey

Thirty participants answered the survey and all indicated they used cases in their classrooms. The majority (53%) reported usage of cases in both their undergraduate and graduate classes with the most common application to ethics and strategic management instruction (see Table 1).

Table 1: Subject Areas and Case Use

Course	Percentage	N = 30
Ethics	33%	10
Strategic Management	33%	10
General Management	30%	9
Entrepreneurship	20%	6
Finance	17%	5
General Marketing	17%	5
International Business	17%	5
Leadership	17%	5
Accounting	13%	4
Economics	13%	4
Computer/Management Information	10%	3
Management/Logistics	10%	3
Human Resources	10%	3
Healthcare Administration	7%	2
Law	7%	2
Healthcare Finance	3%	1
Other (Please explain) Construction Management, Consumer Behavior, Principles of Management, Small Business Management, Organizational Behavior, and Corporate Social Responsibility	23%	7

The question read: In what subject areas do you use cases? Please check all that apply.

Past research recommended instructors develop student outcome learning goals and consider student preparation for cases (The Stanford Center for Teaching and Learning, 1994; Bergmann and Sams, 2012). When asked about their student learning outcome goals, the respondents reported that cases served as active learning tools to help students apply theory to complex real-world situations and developed their critical thinking skills (see Table 2).

Table 2: Student Outcome Goals

Outcome	Percentage	N = 30
Apply theory to complex, real world situation	90%	27
Develop critical thinking skills	80%	24
Engage student to participate	73%	22

Make decisions based upon particular business situation	67%	20
Analyze data	50%	15
Participate on a team	43%	13
Take responsibility for own learning	43%	13
Draw connections across disciplines from one major area to another	30%	9
Other (please explain) knowledge through application, learn from real experience, exposure to business documents	13%	4

The question read: When you use cases in the classroom, what are your goals for the students regarding learning outcomes? Please check all that apply.

Professor preparation and follow up

In addition to instructor set goals, Vega (2013) proposed that they consider the implementation plan regarding cases during class time. When asked about their implementation, the most commonly reported plans by 29 respondents were informal oral presentation by the individual student (59%) and formal oral presentation by teams (52%). Informal oral presentation by the student referred to the expectation that each student would read and answer questions during class about the case. Formal oral presentation by teams allowed for teams to work together on the case and then present to the class.

A significant portion of the review effort made during the SCR Summer Workshops focused on the Teaching Note. It is assumed instructors should have access to information that includes student outcomes for the case, sample questions and answers, an epilogue (i.e., what happened), and other pedagogical materials pertinent to the case. Andersen and Schiano (2014) suggested that professors should develop a plan for the use of cases in the classroom. This teaching note assists professors as they do so. We found that most professors do refer to the teaching note as all respondents selected “sometimes,” “often,” or “always.” The most common response was “sometimes”-- 40 percent of the respondents noted that they “sometimes” used the teaching note (see Table 3). When they did refer to the teaching note, most replied they typically referred to the question and answers to questions section (86%, n=28), while 61% (n=17) read the epilogue.

Table 3: Teaching Note Use

Frequency of Use	Percentage	N = 30
Never	0%	0
Rarely	0%	0
Sometimes	40%	12
Often	23%	10
Always	27%	8

The question read: If a teaching note is available for the case, how frequently do you use it?

When asked what they considered to be their *primary* teaching role when cases are used, the majority (87%, n=26) replied they served as facilitators for class discussion about the case. Questions that they ask of their students more often included a focus on defining the problem or issue in the case (93%, n=28), followed by asking the students to offer a recommendation to address the problem or issue (87%, n=26).

When asked about how they prepare students for class discussion regarding the case, the majority replied that they do talk about the upcoming assignment. Lecturing included theory/models, pointing out how the case relates to the course, and discussing current real life events that pertain to the case (see Table 4).

Table 4: Teaching Prior to Student Case Analysis

Information Item	Percentage	N = 28
Discuss theories that may be applicable to the case	89%	25
Discuss what they have learned in this course that may be applicable to the case	79%	22
Discuss current real life events that pertain to the case	75%	21
Discuss formulas needed for effective analyses that may be applicable to the case	68%	19
Discuss models that may be applicable to the case	36%	10
Other (please explain) Relate to other courses students have taken in the major; discuss similar topics that students may have already experienced; reinforce the importance of looking for aberrations (things that don't look right at the workplace)	14%	4

The question read: What information do you provide to the students before they begin their case analysis? Please check all that apply.

Similar results were found regarding information instructors provide after the students have completed the case analysis. The majority noted that they told the students about the information in the epilogue (77%, n=23), discussed how the case topics related to course topics (70%, n=21), and pointed out the main points students should take away from their work (67%, n = 20).

To encourage students to participate, the respondents reported two actions they have employed. They called on students randomly (57%, n=16), and/or provided incentives, such as a grade for class participation (54%, n=15).

To address assessment, we asked if the respondents used cases for testing. The result were mixed—about 47% (n=14) do and 53% (n=16) do not. Equally mixed results occurred when asked about peer assessment as 53% (n=16) do and 47% (n=14) do not.

Student learning

The importance of students' learning to perform well in teams is documented (Cohen, 1994; Weaver & Qi, 2005; AUPHA, 2015; and Riebe, Girardi, and Whitsed, 2016). When asked if students worked on teams for case analyses, the majority responded they did (86%; n=28); the majority noted they established discussion guidelines prior to using cases (86%, n=26); and they thought this establishment was important to have done (87%, n=26). The instructors also responded that they that working on teams benefited student skill development (see Table 5).

Table 5: Student Development

Skill	Percentage	N = 28
Collaboration skills with their colleagues	86%	24

Knowledge about the subject matter	79%	22
Ease with their being willing to participate in class	68%	19
Professionalism	46%	13
Other (please explain) Networking, Communication, Brainstorming, and help students with virtual teaming	14%	4

The question read: Do you think their working on teams helps students develop _____?
Check all that apply.

The final question asked the respondents to complete the following sentence:

I use cases in the classroom because _____.

Common themes that emerged included the importance of active learning, the bringing of a real life situation (i.e., events that *really* happened) into the classroom to illustrate relevancy, and student enrichment. The respondents said that students are more engaged, and consequently, they learn more effectively.

Pilot Study Take-A-Ways

The pilot study was employed to test the questionnaire and offer a snapshot of the use of cases in the classroom by case researchers who attended the 2016 Society for Case Research Summer Workshop. Thirty attendees participated and the results from the survey were utilized to make a few changes on the follow up survey that we employed for the Fall 2016 (sent to all SCR members). For example, we found that 40 percent of the respondents used the Teaching Note “sometimes.” We were interested to know what factors or considerations kept them from *always* using the Teaching Note. Also, we found reaffirmation that instructors agreed that the use of cases in classroom helped with student learning, not only about facts and events to be learned, but also, about increasing student soft skills. The respondents reported that their use of cases in the classroom helped students learn how to collaborate with others, participate in an open forum, and develop professionalism.

The Focus Group

When the respondents completed the survey, they were asked to participate in a focus group and informed that they did not have to participate, and they could stop at any time. A break was taken so that anyone who did not want to participate could leave the room. The questions asked of the focus group participants follow:

1. *How long did it take you to respond to the survey? Is the survey duration appropriate?*
2. *The objectives of this study are as follows:*

- A. *Identify in which classes professors use cases.*
- B. *Identify professors' goals for student learning outcomes by using cases in the classroom.*
- C. *Compare professors' goals for student learning styles via case analyses.*
- D. *Categorize tools professors rely upon when they use cases (e.g., teaching note).*
- E. *Identify teaching roles professors assume when cases are used in class.*
- F. *Identify grading methods employed by professors when cases are used in class.*
- G. *Assess competency based learning techniques when cases are used in class.*

Help us to identify any objectives that fail to be supported by this survey.

- 3. *What aspect of your use of cases needs to be further amplified by this survey?*
- 4. *What other changes to the survey do you suggest?*

The focus group feedback formed the basis for our revised survey, distributed to Society for Case Research members during Fall 2016 (an analysis of that survey is underway). The themes that emerged from the discussion included that we added questions about respondent demographics and their perceptions of the use of cases by their colleagues in various academic settings. These additions helped to round out Objective A: Identify in which classes professors use cases.

The participants reported that Objectives B and C regarding professors' goals were met by the survey, but encouraged further exploration regarding the tools they rely upon (Objective D). Specifically, they recommended we identify case supplements that may offer value to instructors.

While they said Objectives E, F, and G about teaching roles, grading employed, and competency based learning techniques used by professors were met, they stressed the need for questions to differentiate between face-to-face and online classroom environments, identify what types of cases are used, and the challenges they face when using cases in the classroom. Moreover, they stated that the three journals published by SCR offered value—*Business Case Journal*, *Journal of Case Studies*, and *Journal of Critical Incidents*. We added a question to measure this impact.

The pilot study questions may be read in the “From the Editors” by Cellucci, Peters, and Woodruff. The revised and additional questions for the Fall 2016 survey are as follows.

The Revised Survey Questions “Cases in the Classroom”

- 1. How common is the use of cases by other faculty in your college?

_____Never _____Rarely _____Often _____Always _____Sometimes

2. For what level of classes do you **primarily** use cases?

_____ Undergraduate _____ Doctoral

_____ Masters _____ Other. Please explain [Short answer]

3. Describe the classroom environment in which you primarily employ cases.

_____ Face-to-Face _____ Online

_____ Hybrid (a combination of face-to-face and online)

4. What type of cases do you typically employ? Please check all that apply.

_____ Critical incidents

_____ Mini-cases

_____ Cases published in journals (e.g. Business Case Journal, Journal of Case Studies, Journal of Critical Incidents)

_____ Cases published in textbooks

_____ Cases published as stand-alone products [e.g. Harvard Business Review, Ivey]

5. How much of your semester involves the use of cases?

_____ Less than or equal to 10%

_____ 11 to 25%

_____ 26 to 50%

_____ 51 to 75%

_____ More than 75%

6. How do you use cases in a **face-to-face environment**? Please check all that apply.

_____ I do not teach in a face-to-face environment

_____ Students individually take the role of leader and present the case to the class (formal oral presentation)

_____ Students are on teams, and team members take the role of leader and present the case to the class (formal oral presentation)

_____ Students individually read and answer questions during class about the case (informal oral presentation)

_____ Students are on teams, and team members read and answer questions during class about the case (informal oral presentation)

_____ Students individually post to discussion board about the case and respond to posts (informal written presentation)

_____ Students individually take a practice test about the case to offer experience when they will answer test questions about another case (practice test)

_____ Students are on teams, and team members take a practice test about the case to offer experience when they will answer test questions about another case (practice test)

- Students individually take a test about the case (formal test)
- Students are on teams, and team members take a test about the case (formal test)
- Other. Please explain. [Short answer]

7. How do you use cases in an **online environment**? Please check all that apply.

- I do not teach in an online environment
- Students individually take the role of leader and present the case to the class (formal oral presentation)
- Students are on teams, and team members take the role of leader and present the case to the class (formal oral presentation)
- Students individually read and answer questions during class about the case (informal oral presentation)
- Students are on teams, and team members read and answer questions during class about the case (informal oral presentation)
- Students individually post to discussion board about the case and respond to posts (informal written presentation)
- Students individually take a practice test about the case to offer experience when they will answer test questions about another case (practice test)
- Students are on teams, and team members take a practice test about the case to offer experience when they will answer test questions about another case (practice test)
- Students individually take a test about the case (formal test)
- Students are on teams, and team members take a test about the case (formal test)
- Other. Please explain. [Short answer]

8. What factors or considerations keep you from always using the teaching note? [Short answer]

9. Which case supplements would make you more likely to adopt a case? Please check all that apply.

- Videos Links to social media
- Data files for student analysis Other. Please explain. [Short answer]

10. **If applicable**, please describe any challenges you face employing cases in an online teaching environment. [Short answer]

11. What other challenges do you face employing cases in the classroom? [Short answer]

12. What impact do the Society for Case Research journals have on your teaching and research? [Short answer]

Please tell us about you.

13. What is the highest level of school you have completed or the highest degree you have received?

- _____ High school graduate (high school diploma or equivalent including GED)
- _____ Some college but no degree
- _____ Associate degree in college (2-year)
- _____ Bachelor's degree in college (4-year)
- _____ Master's degree
- _____ Doctoral degree
- _____ Professional degree (JD, MD)
- _____ Other. Please explain. [Short answer]

14. What is your sex?

- _____ Male _____ Female

15. What is your year of birth? _____ [Short answer]

16. How many years have you been teaching at a college/university? _____ [Short answer]

17. How many students attend your college/university? _____ [Short answer]

Cases in the Classroom Conclusion

If you were one who participated in the pilot study, we thank you. Our goal in this research is to learn more about how professors use cases in the classroom and what they determine the value of cases to be for their instruction efforts and student learning. This pilot survey helped us “develop the snapshot of how professors from various fields” use cases in the classroom (Cellucci, Peters, and Woodruff, 2015: 1). We found that the participants thought cases did indeed add value to the learning experience.

In this issue we have nine cases that you may examine. Each case brings a unique perspective to this issue. Below is a summary of the contributions that this set of cases makes to the literature:

- The Path Forward for Dusty Rocker Boots (Pope & Litton, 2016) focuses on supply chain management issues.
- Rebranding Downtown Fletcher (Martin et al., 2016) examines place branding.
- Scarlet Lane Brewing Company (McQuiston & Caldwell, 2016) presents a study on gender neutral positioning.
- Singer Neil Young Boycotts Starbucks (Olsen, Popovich, and Brenock, 2016) focuses on controversies around genetically modified foods.
- Starbucks Enters India (Berger and Blake, 2016) is about Starbucks global expansion, while Starbucks In India (Gopalakrishna, Victor, and Fleischmann, 2016) discusses the strategy of the company once established globally.
- The Kick Seen Around the World (O'Connor, Phipps, and Blake, 2016) illustrates issues that companies face when videos go viral.
- The Revenue Side of the Responsibility-Centered Management Model (Bouillon, Ehoff, and Smith, 2016) examines budgeting in a non-profit setting. And finally,

- Walmart n'est pas une banque (Pagani, Osland, and Borchers, 2016) is about the company's foray into financial services.

We know that one of these cases may add value for your students' learning experience.

References

- Andersen, E. & Schiano, B. (2014). Teaching with cases: A practical guide. Boston, MA: Harvard Business School Publishing.
- Berger, B. & Blake, L. (2016). Starbucks Enters India: The Indomitable Competitor or Underdog? *Journal of Case Studies*. 34(2): 75-91
- Bouillon, M., Ehoff, C., & Smith, K. (2016). The Revenue Side of the Responsibility-Centered Management (RCM) Model at Regional State University. *Journal of Case Studies*. 34(2): 111-120.
- Cellucci, L., Kerrigan, D., and Peters, C. (2012). Case writing matters. *Journal of Case Studies*. 30 (1): 1-7.
- Cellucci, L.W., Peters, C., and Woodruff, E. (2015). Cases in the Classroom: Part B. *Journal of Case Studies*. 33 (2): 1-10.
- Cellucci, L.W. and K. Ford. (2015). Cases in the classroom. *Journal of Case Studies*. 33(1): 1-10.
- Gopalakrishna, P., Victor, R., & Fleischmann, D. (2016). Starbucks in India. *Journal of Case Studies*. 34(2): 92-101.
- Martin, M. C., Moeder, J. M., Martin, M. J., Schawller, H., & Smith, S. (2016). Rebranding Downtown Fletcher: A Case of Strategic Marketing for a Non-Profit Organization. *Journal of Case Studies*. 34(2): 25-44.
- McQuiston, D. & Caldwell, C. (2016). Scarlet Lane Brewing Company: Carving Out a Niche in the Craft Beer Market. *Journal of Case Studies*. 34(2): 45-62.
- O'Connor, J., Phipps, K., & Blasdel, T. (2016). The Kick Seen 'round the World: A Case Study in Crisis Management and Corporate Governance. *Journal of Case Studies*. 34(2): 102-110.
- Pope, D. & Litton, J. (2016). The Path Forward for Dusty Rocker Boots. *Journal of Case Studies*. 34(2): 20-24.
- Riebe, L., Girardi, A., and Whitsed, C. 2016. A systematic literature review of teamwork pedagogy in higher education. *Small Group Research*. 47(6): 619-664.
- Stanford University Center for Teaching and Learning (1994). Teaching with case studies. *Speaking of Teaching*, 5(2), 1-3.
- Vega, G. (2013). The case writing workbook. Armonk, NY: M. E. Sharpe.