



Writing, Teaching and Using Cases



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Agenda

AM

- Case Discussion: Asst. Prof. Worthington
- Principles of Case Teaching
- Working Lunch – prepare *Marketing Chateau Margaux* case

PM

- Group exercise
- Writing Case studies
- Designing Case courses



Assistant Professor Worthington



Class Case Discussion



Principles & Practice of Case Teaching





Some Guiding Principles

- We prefer clarity to profundity, questions to answers, the hunt to the trophy on the wall.
- Don't pay attention to authorities, think for yourself. .
- The price for rejecting easy answers and reliance on authorities is that one must be willing to tolerate ambiguity and accept one's own ignorance.
- Live with doubt and uncertainty. It is more interesting to live not knowing than to have answers that might be wrong.



Some Guiding Principles

- We all learn – teaching and learning are inseparable; the process of education is a reciprocal gift.
- Doubt is not to be feared, but is to be welcomed as the possibility of a new potential for human beings. If you know that you are not sure you have a chance to improve the situation.
- We value thinking out loud above the presentation of the polished products of prior thinking. To paraphrase Niels Bohr, “Never express yourself more clearly than you can think.”
- The stage is too big for the drama. So the truth is rarely perfectly clear, and that is certainly, universally, the truth in human affairs. Hence what is not surrounded by uncertainty cannot be the truth.



A learning contract

Articles of faith surrounding a course^[1]:

- Active involvement is critical to enduring learning, for it transforms passive, received knowledge into the active ability to apply that knowledge effectively.
- We need to master both process skills as well as substantive knowledge, because it is through command of process that the primacy of content is realized.
- We become as important as what we learn. The endpoints of both teaching and learning are as much human as intellectual growth.

^[1] See C. Rowland Christensen (1991) “Every Student teaches and Every Teacher Learns”, in C. Rowland Christensen, David A. Garvin, and Ann Sweet (eds.), Education for Judgment: The Artistry of Discussion Leadership, Boston, MA: Harvard Business School Press



A learning contract

- Fun has a critical place in teaching and learning. Fun permits breakouts from routine. It enlivens the humdrum and sustains generosity as all participants give and receive enjoyment along with the wisdom.
- The instructor's challenge in evaluating students is less to separate the gifted from the ordinary than to find the gifts of the ordinary. At best grades are imprecise measures even of academic achievement. They do not weigh your worth as a person, now or in the future.
- The instructor has unbounded faith in the unlimited potential of all students, really believes in their capability for creativity and growth and in how much all can accomplish together.



Using Cases

- What are cases for?
- Finding the right case
- The importance of the teaching note
- Supplementals (videos, 'B' cases)
- Cases for guiding in-class participation
- Cases for exams and assignments



What are cases for?

- We aim to develop or transmit knowledge of several kinds:
 - Facts
 - Techniques
 - Attitudes
 - Habits
 - Even philosophies or theories
- Cases are a poor way to learn facts
- A clumsy way to learn techniques
- Cases work best when the goal is to show what kinds of problems a discipline is able to solve



Cases supply practice

- At isolating problems so that tools and techniques can be brought to bear on them
- Teach habits and attitudes so basic to a discipline that they must not merely be learned, but become second nature by

FREQUENT

And

VARIED

application



Cases enable the learner

- To develop and articulate an opinion, a point of view
- This is one of the most sought after skills in managers and executives today (Bill Gates....”thinking on your feet”)
- A case class offers one of life’s rare opportunities to articulate your thinking, and to practice speaking in front of an audience of smart peers who are paying for the privilege of being there!
- In a low-risk environment



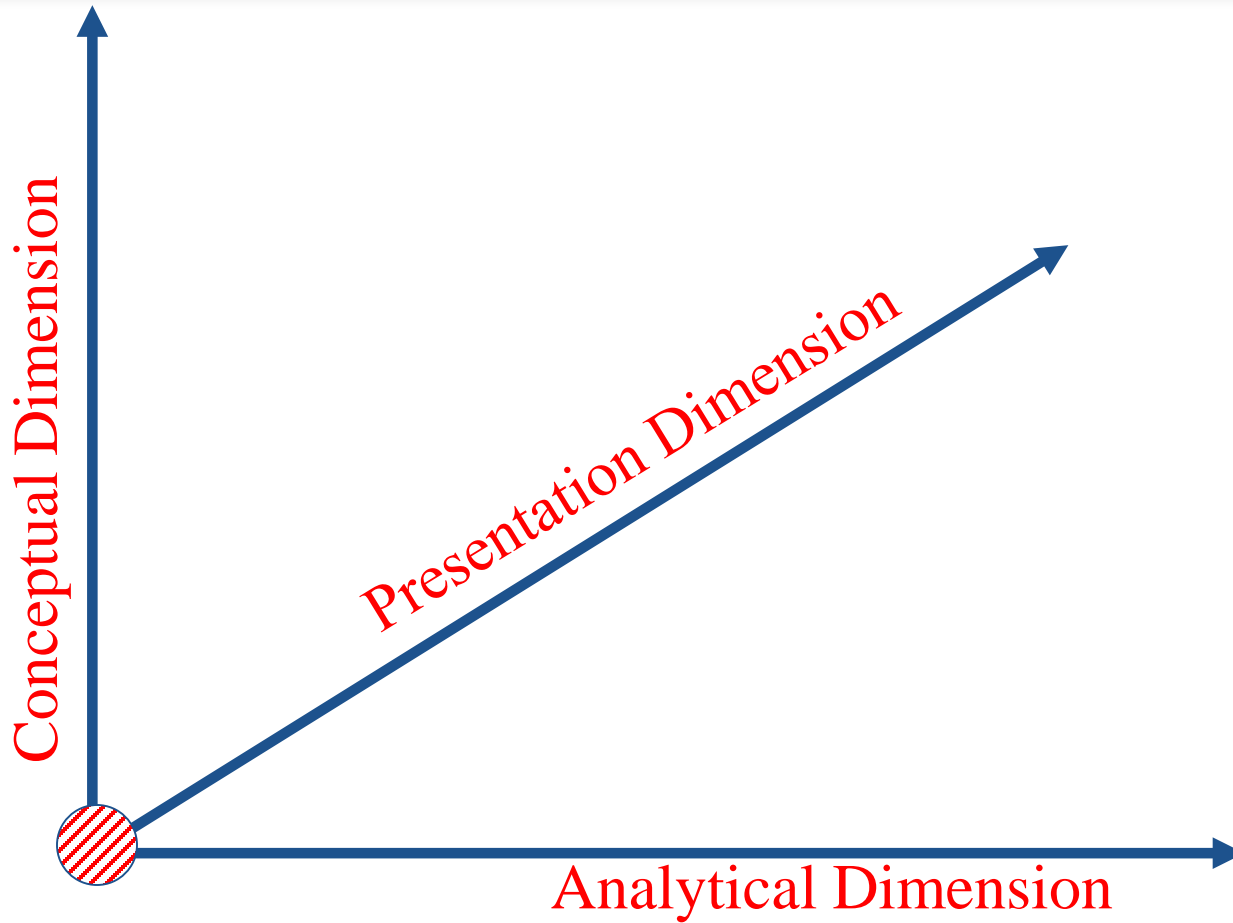
What is a case?

- A statement of conditions, attitudes, and practices at a time in an organization's history
- Usually describes challenging problems that the organization has faced or resolved
- Some may be self-evident, others need to be dug for



Dimensions of Case Difficulty

(1 – 3 degrees of severity)





The Conceptual Dimension

- *What theories, concepts or techniques are useful in understanding this case?*
- Two aspects to difficulty: the number of potential concepts or theories; and the difficulty in understanding and applying them.
- Degree 1 – one or two simple concepts
- Degree 2 – the simple concept(s) becomes complex
- Degree 3 – no clear concept applies, or integration of concepts is required.



The Analytical Dimension

- *What is the task with respect to the key decision or issue of the case?*
- Degree 1 states the issue, the alternatives, the decision criteria and the recommended decision.
- Degree 2 (the most common) may omit some alternatives and/or present incomplete, contradictory or biased analyses.
- Degree 3 cases are those that don't even make the need for a decision clear.



The Presentation Dimension

- *What is really important and relevant information here, what is extraneous, what is missing?*
- Degree 1 – the case is short, well-organized, contains almost all the relevant information, little irrelevant information and is easy to read.
- Degree 2 – short becomes long, relevancy is less obvious (maybe some red herrings), not as easy to follow, many exhibits.
- Degree 3 – long, disorganized, unclear, rambling.



The 4Ps of Case Discussions





The contract in a case class (from Ben Shapiro) – The 4 Ps of case discussion

- **P**reparation
 - “You have not prepared a case until you have formulated an action plan you believe in and are prepared to defend”
- **P**resence
 - Is absolutely necessary, but not sufficient
- **P**romptness
 - Why lateness cant be tolerated
- **P**articipation
 - An indispensable part of grading; passive observation = parasitical



Preparing a case before class

- Vital signs
- Probe more specifically the problems the checkup discloses
- Reach a diagnosis and propose a course of action
- Reading a case: at least 3 readings
- Try hard to take the position of the management in the case
- DON'T second guess, and remember, hindsight is 20-20 vision
- Use the group – but NO group presentations – the small group is NOT a vehicle for a “group solution”
- Have a point of view and be ready to defend it



Discussing a case in class

- The opening / size-up (can be critical)
- Etiquette of class discussion
- Use the class to practice talking well
- Listen; be willing to shift your position
- Developing a class plan
- Using the board
- Using exhibits, spreadsheets, video
- A wrap-up
- “What’s the answer?”



Putting it Into Practice



Marketing Chateau Margaux



Your Assignment

- Meet in small groups from 12.30-14.00
 - Have lunch
 - Prepare the case for teaching
- At 14.00 – meet in small groups to lead a case discussion. Each group will be responsible for an aspect of the discussion:
 - Size-up / opening
 - Discussion pastures:
 1. There are FIVE issues in the case.....identify them
 2. Alternatives & Decision
 3. Key Lessons ('nuggets')
- Reconvene at 15.30 to share experiences & insights



Writing Cases





Writing cases

- Is it recognized?
- Can we/you afford the investment?
- Is there an interesting problem?
- NOT a free consulting job
- NO rewards
- GREAT to have company participation
- Some benefits to having your own cases



The 10-Step Case Writing Process

1. Initial meeting w. company / principals
 1. Lay out the case study in general terms
 2. Establish conditions for Case Release
2. 1st draft → submit to principals for review
3. Revisions, 2nd draft → submit for approval
4. Write Teaching Note
5. Submit both to Ivey for review
6. Revisions
7. Submit for copy editing
8. Revisions
9. Complete Case Information Form, submit along with Consent to Use
10. Submit list of colleagues who might be interested in using
Sit back, wait for fame and fortune to ensue.



Authors vs. Writers

- As a faculty member, Ivey considers you to be the case's "author"
 - This means you receive the royalties (monies collected, less returns, paid annually)
- "Writers" might be the graduate students who do most of the initial writing.
 - They may or may not receive royalties – it's up to you as the author.
- As author, you have permission to use your cases for free.



Some words of caution

- Case writing takes time. Much more than you think it will (double your estimate).
- TNs take the most time and trouble.
 - At least twice the time a case does
- Be careful about jumping on offers to write a case...make sure you have firm conditions under which the case will be released.
- “Cases for Courses”



Using Cases / Final Thoughts





The job of the instructor – the “*guide on the side*”

- The class must accept and maintain ownership of the case
- Resolving conflicts/difficult students?
- Ask *why, how, who* questions
- Use analogy, tie cases to others where possible
- HAMMER the need for evidence from the case
- USE the numbers
- A teaching plan – structure?
- A Board Plan – structure?
- Summary slides



Additional Thoughts

- Identifying good cases
- Case courses
 - Determine pedagogical objectives
 - Select cases
 - Ensure a progression
 - Repeat, repeat, repeat
- Guest speakers
- Case “presentations”
- Case exams
- Assessing class participation
 - What about the ‘quiet’ or ‘shy’ students?



THANK YOU!

