RELEVANCE OF CASE STUDY METHODOLOGY IN MANAGEMENT EDUCATION

Dr.M.ARUMUGAM
PROFESSOR & HOD
DEPARTMENT OF MANAGEMENT STUDIES,
INFANT JESUS COLLEGE OF ENGINEERING,
KEELAVALLANADU, INDIA
TUTICORIN – 628851.

Executive summary:

The use of case studies in Management education is now an universal phenomenon. This pedagogy is now taken for granted by almost all the B-schools. This paper essentially deals with the following issues which is relevant to use the case study method in Management education.

- The need for using case study, it’s strength and weakness
- The role of a faculty/ instructor and student in class room
- The relevance of using case study from the student as well as faculty/ instructor perspective.
- A few latest examples on management cases

This paper closes with the following conclusion, case studies may be used as a substitute/supplement to class room lectures. In fact case methods have to be often supplemented with a combination of other tools including texts, videos and internet searches wherever possible.

Key words:
Management education, case method, pedagogy, holistic, faculty/ instructor’s role, empathy

Case study method:
“Cases constitute a kind of virtual apprenticeship in which students can apply ethical principles to actual situations and discuss the outcomes with each other and with a faculty mentor”

Gorman, Mehalik, Werhane-2000
Introduction:

The use of case studies in Management education is a universal phenomenon. The pedagogy is now taken for granted by all the B-schools. The method of teaching used in management education is quite different from most of the traditional methods of teaching used at the school and undergraduate course levels. Unlike traditional lecture based teaching were student participation in the class is minimal, the case method is an active learning method which requires participation and involvement from the students in the class room. For students who have been exposed only to the traditional teaching methods, this calls for a major change in their approach to learning.

Why case study?

Medicine, Law and Management are the three major disciplines where case studies are used as an effective medium of teaching and learning. In the Indian context of MBA curriculum, understanding the class room profile of the incoming students is very important. As most of the students coming straight from their UG classes, a majority of the MBA classes will comprise of an average age of less than 25 years. Most of them are likely to be fresher’s -- those without any work experience. A high percentage of students would be from the middle income group. These students simply go to the classes passively attend the lecture, absorb whatever they can and most often not even ask a single question.

For clarification the double loop learning process that requires questioning and answering is absent. So most of the times thus, the incoming student faces several challenges never faced before. The biggest change for the MBA student is the shift from learning by teaching to learning through critical thinking. In case studies there are no lectures, no unique solutions to problems thrown. Students are expected to analyze the cases make presentations using the text books, Library or internet to discuss the issues in teams/ groups and work on tough deadlines. The emphasis is on self learning and self regulation

Case study as a strategic teaching methodology:

Harvard business school (HBS) is considered to a Pioneer in developing and using case study method as a Management teaching pedagogy. Case studies from Harvard business review have been used by MBA students for years. An average of about 50 – 100 cases are normally discussed by the students during their course of study.

What is a case study?

“Case studies involve a hypothetical or real life situation relevant to the course material that requires a solution. A case is usually a description of an actual situation, commonly involved in a decision, a challenge, an opportunity, a problem or an issue faced by a person or persons in an organization.” In learning with case studies, the student must deal with the situation described in the case, in the role of the Manager or the Decision maker facing the situation. An important point to be emphasized here is that a case is not a problem. Because a problem usually has a unique correct solution on the other hand, a decision maker faced with a situation described in a case study can choose between several alternative courses of action.
and each of these alternatives may be supported by some logical argument. To put it simply, there is no unique or correct answer/solution for the case study.

**Strengths and weaknesses of using case study method:**

Case studies have been criticized by someone as lack of scientific rigor and reliability and that they do not address the issues of generalize ability; however there are some strengths of using case studies. For example it enables the student to gain a holistic view of a certain phenomenon or series of events and can provide a round picture since many sources of evidences are used. Strength of using case study is that case study can be useful in capturing the emergent and immanent properties of life in organizations and the flow of organizational activity especially when it is changing very fast.

There are some minor weaknesses or shortfalls in using case studies in the class room. As Herreid points out that the case method cannot solve all of the ills in the teaching. It is not the best method to deliver a plethora of information, concepts and principles. However the case study method is an ideal method for developing higher order reasoning and thinking skills with the students.

**The role of the faculty/ instructor and students in the regular case classes:**

Case studies are usually discussed in class room in the large group. However sometimes the faculty may require individuals or groups of students to provide an oral or written analysis of a case study in the class room. The case study method usually involves three stages (i) individual preparation (ii) small group discussion (iii) large group or class room discussion. While both the faculty/instructor and the student start with the same information their roles clearly different in each of the three stages as shown in Table no: 1

<table>
<thead>
<tr>
<th>When</th>
<th>Faculty/ instructor</th>
<th>Student or participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before class</td>
<td>Assign case and often readings</td>
<td>Receives case and assignment</td>
</tr>
<tr>
<td></td>
<td>Prepares for class</td>
<td>Prepares individually</td>
</tr>
<tr>
<td></td>
<td>May consult colleagues</td>
<td>Discusses case in small group</td>
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<tr>
<td>During class</td>
<td>Deals with readings</td>
<td>Raises questions regarding readings</td>
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<tr>
<td></td>
<td>Leads case discussion</td>
<td>Participates in discussion</td>
</tr>
<tr>
<td>After class</td>
<td>Evaluates and records student participation</td>
<td>Compares personal analysis with colleagues analysis</td>
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<tr>
<td></td>
<td>Evaluates materials and updates teaching notes</td>
<td>Review class discussion for major concepts learned</td>
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*Source: Michiel R.Leeenders, Louise A.Mauffettel Launders and James Erskine, writing cases (Ivey publishing 4th edition)*
A classroom discussion is usually guided by the faculty/instructor. The students are expected to participate in the discussion and present their views during the discussion. While a student presents his point of view others may question or challenge him. The faculty may ask questions to the class at random about the case study itself or about the views put forward by individual students. Case instructors usually encourage innovative ways of looking at and analyzing problems and arriving at possible alternatives. This must take place in a constructive and a positive manner. Such interactions help to improve the analytical, communication and the interpersonal skills of the students.

If a group of students are asked to analyze a case, they must ensure that all the group members must contribute to the preparation and discussion. It is important that the group is able to work as a cohesive team. The problems between team members are likely to have an adverse impact on the group’s overall performance.

**Relevance of using case study:**

(i) **From the students perspective:**

The case study method used in the Management education has several benefits over traditional teaching methods. The skills that the students develop by exposing to this method is listed in the Table no: 2

<table>
<thead>
<tr>
<th><strong>Inventory of skills developed by the case method by students</strong></th>
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<tbody>
<tr>
<td>1. Qualitative and quantitative analytical skills, including problem identification skills, data handling skills and critical thinking skills.</td>
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<tr>
<td>2. Decision making skills, including generating different alternatives, selecting decision criteria, evaluating alternatives, choosing the best one and formulating congruent action.</td>
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<td>3. Application skills, using various tools, techniques and theories.</td>
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<td>4. Oral communication skills, including speaking, listening and debating skills.</td>
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<td>5. Time management skills, dealing with individual preparation, small group discussion and class discussion.</td>
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<tr>
<td>6. Interpersonal or social skills, dealing with peers, solving conflicts and practicing the art of compromise in small or large groups.</td>
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<tr>
<td>7. Creative skills, looking for and finding out solutions geared to the unique circumstances of each case.</td>
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<tr>
<td>8. Written communication skills, involving regular and effective note taking, case reports and case exams.</td>
</tr>
</tbody>
</table>

*Source: Michel R.leeenders, Louise A.Mauffette-launders and James Erskine, writing cases (ivey publishing 4th edition)*

Case study method allows students to learn by doing. They allow students to step into the shoes of decision makers (empathy) in the real life organizations and deal with the issues managers face with no risk to themselves or the organizations involved.

Cases improve the students ability to ask the right questions in the given problem situation. Case studies expose students to a wide range of industries, organizations, functions and
responsibilities. This provides the students flexibility and confidence to deal with a variety of tasks in their careers. Case studies strengthen the student’s grasp of management theory and theoretical concepts by providing rich, interesting informations about real life business situations. Case studies reflect the reality of managerial decision making in the real world, where students must make decisions based on limited/insufficient informations available.

When working on a case study in groups, students must also be able to understand and deal with different viewpoints and perspectives of the other members in their team. This serves to improve their communication and interpersonal skills. Case studies provide an integrated view of management, managerial decision making which involves integration of theories and concepts learned in different functional areas such as production, marketing, human resource and finance. The case method exposes students to various areas of management.

(ii) From the Faculty/instructor’s perspective:

There has been a complete transformation in the field of education in India in the past ten to fifteen years. Technology like computers, LCD projectors and multimedia have helped service providers offer better service to more customers. Similarly the using of case study method enabled faculty/instructors deliver the lecture in less time and in an effective manner to even a large group in a highly contact regular class. It has enabled them to concentrate more on knowledge management rather than preparation of teaching notes. It has paved way for increasing the scope of improving knowledge operations with the introduction of modern case studies using web-based training. Of late, a shift in focus from conventional courses like arts and science to specialized courses like Environmental Management, Hospital management, Tourism/Travel management and Fashion Design can be witnessed. All these specialized courses use enhanced features like updated syllabus and industry interaction. By using case study method, one can improve/enhance the quality of education. As education is being perceived as a necessity across all segments the faculties can explore by using case study methods for improving the various skills like analytical skills, decision making abilities, creativity, team spirit, time management, improvement in communications skills so that some basic flaws in the Indian educational system like neglecting employment oriented education and participative education can be corrected. These have to be necessarily adopted by the faculties if they are to survive in this globalised era.

Business and management case studies – Some latest Examples:

Business and management case studies present specific, real life examples of the issues and tactics used by leading National/international businesses or companies to succeed globally. Given below are some of the latest case studies in the major business or management areas. Each case covers some important issues like Globalization, Product Marketing, Brand management, Mergers and Acquisitions (M&A), Corporate Social Responsibility (CSR), Human Resource Management (HRM), Leadership etc.,

Some latest case studies:

- **FORD** – global mindset and risk assessment case study
  Ford’s global strategic management and strategies like Aligned Business Framework (ABF), and matched pairs analyze the global mindset at Ford motor company.
Michael Dell- A leadership case study

This case study discusses the leadership/qualities of Michael Dell, the leader in Lap Top computers

Case study on FedEx – HR Practices

This case study highlights the Innovative HR practices and programs like PSP (people – service - profit) philosophy which FedEx has launched since its early years.

Wal – Mart India- case study

Will wal-mart’s supply chain work for India?

McDonald’s – business strategy in India

This case study shows how McDonald’s adapted to local culture in India, its localization and entry strategy and strong supply chain and pricing strategy

Crossword – innovative strategies in book retailing

This case study shows how Crossword bookstores changed the bookselling and buying scene in India. It shows the crossword’s constant innovations.

Conclusion:

The most crucial element in Management Education is developing the student’s ability to critically evaluate the information/ facts and make them to think laterally. The students who had acquired proper thinking skills will grow into adults and ready to face the challenges of their lives. Students who know how to think will get along easier in all other areas of life. However students who did not learn how to think on their own often find it hard to get along with others or even will have difficulty in holding down a job. Case studies are nowadays used as an important pedagogy by the management education faculty members to adopt their teaching style to meet the growing and current needs of the student community. Comprehensive cases are quite useful in decision making situations even for managers. To conclude, case studies may be used as a substitute/supplement to class room lectures. In fact, case methods have to be often supplemented with a combination of other tools including texts, videos and internet searches wherever possible to make it cent percent useful.

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