Based on our own experiences in the classroom, at Society for Case Research meetings, and our working with this journal, we put forth that some of us really began to learn what a case was by attending the Society for Case Research (SCR) conferences and workshops, writing and publishing cases in SCR journals, and assigning cases to be used in our classes.

Moreover, the process of writing and publishing cases has increased our understanding of their value in the classroom. Thus, for this issue, our “From the Editors” article focuses on cases in the classroom.

What Exactly is a Case Study?

A case study is a series of real events that tell a story about an issue or conflict to be resolved (Stanford Center for Teaching and Learning, 1994). The story typically has characters, and there is sufficient character development to draw empathy from the audience. Furthermore, cases typically do not have an obvious solution; the reader often has to iterate through a breadth of complex information in order to develop possible solutions to the conflict.

The Stanford Center for Teaching and Learning (1994, p. 2) stated that in deciding whether or not to use a case in the classroom, a faculty member should first identify goals. Possible goals include:

- Helping students apply theory to complex, real world situations;
- Giving students teamwork experiences;
- Helping students draw connections across disciplines; and
- Giving students practice with analyzing data and drawing conclusions in a particular business context.

Another goal of a case study, as suggested by (Vega, 2013), is for it to engage students in a learning format that is different from the more traditional lecture style of teaching because the traditional delivery requires less engagement and interaction from students. Also, if students expect to be lecture to, they may be more likely not to have prepared for class ahead of time. As a consequence, they may not be as mentally engaged with the lecture as we instructors would prefer.

For example, consider the flipped classroom (Bergmann and Sams, 2012). In a flipped classroom, students watch short videos and read materials prior to coming to class. Then, instead of listening to a lecture, students spend class time working
through exercises or projects and participating in class discussion. McCarty and Dixon’s “The Case of the Co-op Coup” is one that may be suited for a flipped classroom as students may read the case in advance and then, spend class time discussing what factors encourage teams or challenges that may prevent teams from realizing their potential. Or, they may discuss their own life events and experiences on teams and identify what factors helped or thwarted team success.

Cases provide an excellent venue for active teaching and learning. Students read the case, watch short videos about the company and conduct an Internet research to prepare for class. In-class time is devoted to working on solutions to the case, answering case related questions, and participating in class discussions about the case. Consistent with the flipped classroom, students will often discover answers (as opposed to their waiting for the professor to give the answer). Thomas’s case, “ASPCA,” illustrated the appropriateness of this teaching format. Students read the case, watch the marketing efforts of ASPCA (e.g., via YouTube), and then discuss the appropriateness or inappropriateness of its revenue distribution.

**How Exactly Do Instructors Use Cases in Class?**

Vega (2013) provided a schema, based on 5 Ps, to assist faculty in teaching cases. The 5 Ps are: purpose, persona, preparation, practice, and problems.

**Purpose**

Instructors should be able to explain the purpose, answer the “why” question—“Why is this case used for this class?” Consistent with the goals listed by the Stanford Learning and Teaching Center (1994), Vega (2013, p. 7) included additional goals for cases in the classroom:

- Fosters critical thinking;
- Teaches students the ability to look at problems in different ways;
- Enlivens the classroom;
- Encourages students to be responsible for their own learning; and
- Develops collaboration skills among groups of students.

In addition, Vega (2013) noted that cases not only provide a more active way of teaching, but they also blended affective and cognitive learning styles. For example, students may analyze and write up a case analysis or create an in-class presentation that spurs class discussion. The professor may assign both the written analysis and presentation as individual or team work. Or, cases may be part of an in-class exam that requires students to apply theory they learned in class to a real life situation in a limited timeframe.

**Persona and Preparation**

Vega (2013) noted that the role of the instructor is to provide leadership and management (*persona*).
In order for the instructor to provide leadership and management of the case, he must prepare. Similar to Vega (2013), Erskine, Leenders, and Mauffette-Leenders (2003) also stated that it is important for the instructor to prepare the case ahead of time.

A well written teaching note provides the instructor with relevant information. It identifies the issues of the case and provides information about applicable theories, concepts or models. Also, the teaching note supplies recommended questions that an instructor may adopt or modify to fit his class. Furthermore, a teaching note offers thorough answers to the questions that depicts a typical “A” student response.

Finally, some teaching notes include a pedagogical discussion, based on the authors’ own experience in classroom testing the case. Whaley and Brown in “Will MannKind’s Dream Come True?” included typical assignment timing and format based on their experiences. Foster and Cox’s case, “A Case’ of Wine,” illustrated the value an epilogue may yield. The case centered on pricing strategies and presented a particular strategy that may bring about favorable outcomes. In the epilogue, Foster and Cox included the rest of the story—the consequences of the owners’ decision. Thus, the instructor may affirm (or challenge) student assessment of strategy options.

Responsibility lies with the instructor to prepare and plan discussion that is orderly to keep students focused. Develop a list of questions that you anticipate students may ask and schedule enough time in the class to allow for effective discussion. Serve as a guide regarding student interactions. If the class discussion stalls, then intercede and draw students back into the case discussion. To illustrate, consider “Good Fences” by Dobbins and Bolinger. The authors recommended that professors assign role-playing assignments to the students to practice negotiation skills in the safe setting of the classroom. Moreover, Altman and Vitucci in “Constituent Building to Form a new University and Promote Regional Economic Development” recommended that students read a specific article so they are better prepared to analyze strategies for managing organizational stakeholders.

According to Andersen and Schiano (2014, p. 52) a teaching plan for a case should include the following items:

- Main points students take away from the exercise;
- Links to other topics in the course (or other courses and even other cases);
- Topics to be discussed as well as the order of them;
- An opening or lead question to stimulate discussion (and who will ask the question—the instructor or a certain team or individual in the class);
- A rough plan for key points to be underscored in class;
• Information on theories, frameworks, or models relevant to the case;
• Supporting material for the case (such as videos, readings, etc.); and
• A summary or conclusion that will serve as a transition to the next class period.

“Generic Questions” that include process questions, analytic questions, conceptual questions, and presentation questions follow: (Erskine, Leenders, Mauffette-Leenders Erskine et al. (2003, p. 118):

Generic process questions:

Why? Can you explain it differently? Would you like to add anything to what you just said? Do you agree/disagree with what your colleague just said? Who would like to speak next? Who would like to summarize? How much time do we have left?

Generic analytic questions:

What is the core issue? What are the related issues? Why did these issues arise? By when does the issue have to be resolved? How important is the core issue? What is your analysis? What are your decision criteria? What is the best alternative? What outcome do you predict? What is your implementation plan?

Generic conceptual questions:

Which theories/concepts/tools are applicable? What have you learned in this course (or other courses) that might be applicable? What does the textbook/article/assigned reading say about this topic?

Generic presentation questions:

What information in the case is there to support your assertion? What information in the case is relevant to the issue? What information is missing? What assumptions have you made in your analysis?

The Stanford Center for Teaching and Learning (1994) recommended instructors direct class discussion via open-ended questions. Questions encourage students to address case concepts or identify key issues and generate a separate list of possible actions.

On a specific note, SCR publishes three journals: Journal of Business Cases, Journal of Case Studies, and Journal of Critical Incidents. Some cases or incidents may suit discussion for 15-30 minutes while others require an entire class period or more.
The instructor’s responsibility includes selecting a case or incident and manage the time according to the selection.

Another responsibility of the instructor is to involve the entire class as best as possible. Vega (2013) suggested that the instructor ask students to bring notes on the case to class so they recognize the importance of being prepared prior to class. Another option is to call on students who are not participating in the discussion and curb the talkers—the students that tend to dominate class discussion. A third option is to assign students to specific roles within the case ahead of time and have these individuals prepare to speak on their assigned roles during class time.

**Practice**

The instructor may play devil’s advocate. To question students and advance the discussion from her prepared list of questions may provide a point of view or introduce an action that the group has not considered yet. Furthermore, giving students practice cases throughout the semester will improve their critical thinking and case analysis skills. As they experience cases and the related discussion over time, they will begin to think about alternative perspectives. Consider, for example, McKnight and Cook's case “Opportunity or Temptation?” Students focus on the decision making process and what other factors (e.g., uncertainty) may influence decisions. Also, Martinez, Brooks, and Cox in “Pipe Dreams” directed readers to consider a specific marketing effort. Students understand that humor is subjective and recommend actions that should be taken by the company to address a failure.

Vega (2013, p. 229) advocated that a rubric is a useful tool when evaluating a student on their case analysis. Did he:

- Identify the problem accurately?
- Identify the salient facts?
- Distill the subtle, less explicit information in the case?
- Draw appropriate conclusions from the facts?
- Identify different alternatives solutions?
- Propose and defend logical, usable recommendations, supported by facts or data from the case?
- Outline an action plan for implementation?

The above items could then be place on a five point rating scale, using the modifiers as noted:

5 = demonstrated complete understanding of the problem
4 = demonstrated considerable understanding of the problem
3 = demonstrated partial understanding of the problem
2 = demonstrated little understanding of the problem
1 = demonstrated no understanding of the problem
0 = no response/task not completed
Instructors also may assess student performance based upon her individual class contributions during case discussions. Erskine, Leenders, Mauffette-Leenders (2003, p. 152) suggested that faculty members evaluate both the quality and quantity of individual contributions to the class discussion. Quality and quantity could be evaluated according to the following ten point rating scale:

10 = Major insights provided often in discussion
8 = Major insights provided regularly in discussion
6 = Major insights provided seldom
8 = Expected insights provided often in discussion
6 = Expected insights provided regularly in discussion
4 = Expected insights provided infrequently in discussion
6 = Minor insights provided often in discussion
4 = Minor insights provided regularly in discussion
2 = Minor insights provided infrequently in discussion
0 = No insights provided in discussion

Vega (2013) noted that if some of the case discussion issues are left unresolved at the end of class, the instructor may assign these issues for the next class meeting. Finally, Vega (2013) also advised instructors to offer final words in class to clarify the process of analysis and student assessment. Moreover, this time gives the instructor the opportunity to tell the rest of the story—the epilogue of the case. Guidry and Peters in “Carolina Ingredients: A Problem with Its Management Information Systems” offered the epilogue that effectively addressed the issues raised in the case. Hence, the instructor may tell the students if their proposals were indeed the actions taken.

What Problems Should Instructors Anticipate?

Problems
Foran (2001) identified problems faculty may face when using a case in class. The first is subject matter. That is, finding a case that fits the particular theory or concept may not be an easy task. Although there are more business cases available than in other disciplines, some faculty have had more difficulty finding cases to fit a particular business theory, model or concept. For example, Kennedy in “It Costs How Much” focused on the health care industry and the issues of transparency regarding costs and informed consent.

Fewer business cases have locations outside of the United States or are written on niche business practices. Stellern, Phipps, and O’Connor ‘s case “Papandreou’s PanHellenic Policy: The Greek Deficit Crisis,” encouraged students to analyze economic guidelines set by the European Union, the Greek public debt and deficit,
and the fiscal crisis. Then, the students decide whether Papandreou should advocate for significant austerity measures on the Greek economy to reduce its deficit, or attempt to withdraw from the European Union.

Andersen and Schiano (2014, p. 18-24) recommended that a professor selecting a case for class be mindful of case publication date; availability of teaching notes; diversity of protagonists; company size; stage of the company (i.e., start-up versus mature); case complexity; case length; whether case is used in other courses in your college; geography; and anonymity (i.e., students prefer undisguised cases, Andersen and Schiano, 2014, p. 24). Their recommendation underscores the importance of finding the case that fits goals identified. One cautionary note—to many goals may inhibit a professor from finding the one ‘right’ case.

On a specific note, one advantage to being a member of SCR is the opportunity to share cases at conferences and workshops as we work to perfect our research (as well as through the web and other databases that our group contracts with for distribution). Thus, we become aware of cases that may suit our class assignment goals. Moreover, we encourage members of SCR to network by sharing their published cases (as well as other cases published by SCR) with colleagues.

**Student Perspectives**

We encourage professors who use cases in the classroom to consider potential issues that warrant attention from the student perspective.

The first concerns ease. It is simply easier for students if the instructor would just merely provide clear cut answers as students typically are uncomfortable with ambiguity (Stanford Center for Teaching and Learning, 1994). We do not propose we take the easy way. Rather, our using cases in the classroom may force students to address ambiguous situations and present recommendations. This style of teaching and learning is a far cry from traditional student passive behavior and, at times, students are taking risks to become engaged. Participation is not always easy. Students may be concerned their answer is not “right;” they might appear unintelligent in from of their peers (Weaver & Qi, 2005). So, they may hesitate to speak up and join the class discussion.

The second concerns gender and minority status. Some students may not speak out in class because of past experience with instructor and peer criticism. And this outcome of self-silencing introduces the impact of gender and minority status in the classroom setting. Women and minorities may be particularly susceptible to self-silencing in class because of past experiences (Romero-Canyas, Reddy, Rodriguez, and Downey, 2013 and London, Rattan, Downey, Romero-Canyas, and Tyson, 2012). Nonetheless, both male and female students may try to avoid their being penalized for failing. The authors emphasize that the instructor take responsibility to set classroom standards and remain cognizant to establish and maintain a “safe classroom.” And, the classroom is a safer environment than the business world where the punishment may be more severe (Cellucci, Kerrigan, & Peters, 2012).
With instructor guided classroom standards, the case exercise may not only yield an exciting discussion, but also help some students build confidence to speak out in class, and then, in their future place of work.

Cases from the journal that are well suited for this type of classroom experience include “A Bully Gone Wild” and “Training Mask.” Johnson's case “A Bully Gone Wild” addressed a difficult personnel situation in which students may consider how best to respond to bullying at the workplace--in the safe environment of the classroom. Students may offer suggestions without fear of said 'bully' retribution. Also, Brotherton and Smith's “Training Mask” offers students the opportunity to develop and recommend a marketing plan for a company without fear or consequence that their recommendation may not be the 'right' one.

The third concerns student preparation. There are several techniques that could help students be more prepared for going over a case study in class. One recommendation is to require students to prepare written answers to case questions ahead of time may help alleviate the fears that students have about ambiguity and speaking in front of others. Preparation can increase students’ confidence in understanding the material and increase participation (Weaver & Qi, 2005). Moreover, team work or small groups in the classroom may encourage students to work together to understand the material. Small groups enable students to use active learning and engage in substantive conversation that help with achievement (Cohen, 1994).

Experiential learning exercises may be employed, designed for students to apply theory to practice. According to social psychologist D.A. Kolb, (Kruger, Kruger, & Suzuki, 2015, 1):

> [L]earning, change, and growth are seen to be facilitated best by an integrated process that begins with here-and-now experiences followed by collection of data and observations of that experience.

“Tacoma Art Museum” by Wilson and Fellows is rich with outside of preparation options, and they elaborated a few options for instructors in the teaching note. Students may visit the museum’s website or read other published articles about free admission and its impact on museums. Also, Hodge and Carpenter’s “Terminated” may be better understood by students if they prepare prior to class by referring relevant case literature regarding religious beliefs and potential work conflicts.

The last issue that warrants attention concerns students and professionalism. According to the Healthcare Leadership Alliance (HLA), professionalism in healthcare is (Garman, Evans, Krause, and Anfossi, 2006, p. 219):

> [T]he ability to align personal and organizational conduct with ethical and professional standards that include a responsibility to
the patient and the community, a service orientation, and a commitment to lifelong learning and improvement.

Cases may motivate students to grasp the significance of their mastering professionalism. Professionalism includes (Evans, 2015, p. 5):

What practitioners do;
How they do it;
What they know and understand;
Where and how they acquire their knowledge and understanding;
What kinds of attitudes they hold;
What codes of behavior they adhere to;
What purpose(s) they perform;
What quality of service they provide; and
The level of consistency incorporated into the above.

Cases in this journal issue that focus on professionalism include Hodge and Carpenter’s “Too Big for His Britches,” which demonstrated how one should not behave toward employees, while Svagr’s “Emergency” exemplified how healthcare professionals should and should not treat patients.

**Cases in the Classroom: Part B**

We presented this article with evidence based primarily from on our own experiences. The next step is to learn what other professors that use cases in the classroom have found through their experiences. Thus, in the fall 2015 upcoming Volume 33 (2), we will have developed a survey that addresses teaching and the case method. Until then, look for cases that suit your goals in this issue. We have 17 for you to examine; we think at least one may be just what you are looking for to add value to your students’ learning experiences.

**References**


Bergmann, J. and Sams, A. (2012). Flip your classroom: Reach every student in every class every day. International Society for Technology in Education. Alexandria, VA.


