

Getting

Technology, student demographics, and globalization have transformed almost every aspect of business school, and the case study method of teaching is no exception. Today's case studies have the same goals as those pioneered at the Harvard Business School 80 years ago; they are designed to teach students how to analyze a specific problem, faced in the real world by a specific company, and decide on the best course of action in response.

However, new media, new delivery options, fresh and urgent issues in the business world, and the evolving makeup of the student body have combined to ensure that the 21st-century business case is nothing like the one students mastered back in the 1920s. For one thing, cases today deal with topics and problems that weren't even considered 80 years ago. But the biggest transformation case studies will ever undergo may still be in the offing, as major case providers consider the best way to deliver cases in a multimedia format.

These are not your grandfather's case studies. New media and new content are leading to widespread transformation of these venerable b-school teaching tools.

by Sharon Shinn

illustrations by Hadar Kimchy-Shiloh

The Message in the Medium

As of yet, most publishers have only a small number of their case studies available through digital media such as DVDs or interactive Web sites. However, the simple combination of high-quality technology and student demand would seem to indicate that more and more cases in the future will be produced for multimedia presentation.

"There aren't as many multimedia cases available as I would have expected by now, to be honest," says Jeffrey Gray, director of The European Case Clearing House, Cranfield University, England. "I think one of the reasons is that the level of investment is relatively high and often the cases that are produced in this format can have quite short shelf lives. Technology changes. People are worried that if they invest the sort of money needed to produce these cases, they'll be superseded by something else within three or four years. They won't really have had their investment repaid through a relatively short period. Having said that, we do have a number, and that number is growing."

Copyright issues also are problematic, especially if the case writer wants to use clips from TV shows or bits of music, notes Paul Beamish, the associate dean of research at the Richard Ivey School of Business at the University of Western Ontario in London,

Down TO Cases



Ontario, and the man who heads Ivey Publishing. He adds, "You get to the point where you say, 'I hope somebody else does it.'"

But the advantages of multimedia case presentations are so strong that a few adherents have been completely won over. One huge fan of the new media is Kathie Amato, director of Darden Business Publishing at the University of Virginia's Darden Graduate School of Business Administration in Charlottesville. She notes that the school is leaning heavily toward investment in multimedia delivery of cases, driven primarily by tools like the Internet.

"People are accustomed to being able to access streaming video with the touch of a button," Amato says. "So when they read about what someone had to say in a situation, what they really want is to *hear* what that person had to say. They want to see that visual and have that entire experience."

She continues, "We have some products that lend themselves to being put on a CD and sent out to people, just as we used to mail text cases. We have some cases that can be accessed over our server. We have some cases that can *only* be delivered that way because they are simulations in which people can actually interact with others. People can log on simultaneously, whether they're in a class of 30 or 300 people."

In particular, cases that focus on supply chain marketing work well in such an interactive setting, she says. "One of the things people never seem to get is the concept of channels of distribution and how decisions have to be made throughout the channel to make sure the right inventory is in the right place at the right time," Amato says. "We've got some very dynamic ways that allow people to log on simultaneously and be part of the supply chain. They make decisions that affect other parts of the supply chain. It's very much like interacting in a real-world environment. Some of these cases have a gamelike aspect to them. The professor can divide people into teams, and they can compete with each other."

Some of the Darden cases available on CD allow students to score themselves in certain areas. "If you make this decision, you get this outcome. If you make a different set of decisions, you get a different outcome," says Amato.

Harvard also carries a few multimedia cases, though the school has not yet heavily invested in that format. "The multimedia cases may have some accompanying audio or video, or some animated exhibits," says Lisa Joy, senior project manager with the Case Group at Harvard Business School Publishing in Boston, Massachusetts. "They present information in a way that brings the case to life a little more. When



they work and when the situation is appropriate, multimedia cases can be really powerful."

For instance, she describes a case that presents a manager's point of view in a specific situation. "When students merely read the case, they're sympathetic with the manager; but they're not sympathetic when they hear him on video," she says. "When he's on video, they think he's rude. It really changes things." As more cases are written about recent events, and students can view live clips of CEOs on the Internet and cable television, such audio and video accessories are likely to become even more essential to case study presentations.

Electronic Ease

Despite the possibilities inherent in new media, the majority of cases available from all providers are still text-based. However, even those have been influenced by the electronic media, particularly in their method of delivery. Today's case is far more likely to be sent to the end user over the Internet than on a printed piece of paper.

"We try not to deliver text cases in the mail any more," Amato says. "We either deliver them electronically as a PDF file that the user can download and reproduce, send cases on CDs, or allow people to come to us and access our server remotely."

Indeed, the ability to deliver cases electronically has been a huge boon to suppliers of case studies, who used to reproduce and mail reams of paper to professors teaching a case-based course. "Now we can transmit almost our entire collection in portable document format, which other schools can download and convert into print paper copies for their students," says Beamish of Ivey.

Such online delivery requires encryption techniques so the case doesn't end up endlessly forwarded in an e-mail loop,

“When students merely read the case, they’re sympathetic with the manager; but they’re not sympathetic when they hear him on video. When he’s on video, they think he’s rude. It really **changes things.”** –Lisa Joy

says Sheryl Gregson, general manager of Ivey Publishing. However, the electronic delivery system does shift the burden of reproduction to the teaching school. And make no mistake, she says—most cases still end up on paper at some point. “Our own internal survey of our students says they still want paper,” she says. “If we give the case to them electronically, they’ll print it out.”

Amato concurs. “The vast majority of cases we produce are still somehow put into a hard copy format on our end or the student’s end,” she says. “But I think over time we are going to see people becoming much more comfortable with reading things on the screen, and that will change our delivery methods even more.”

The Internet has also made it possible for professors to go online and sort through available cases to cherry-pick items suitable for their particular classes. All the major case study providers offer searchable databases that allow professors to hunt for a case by discipline, location, or problem. “You can use the search engine to ask for a strategy case on the fisheries industry in the North Atlantic and come up with various hits,” says Gray. “The search engine will take you to all the case abstracts. If you’re registered as a member of a teaching faculty, you can actually see copies of the cases online.”

At the Asian Business Case Centre, located at Nanyang Technological University in Singapore, the database is organized so that site visitors can search by title, author, organization, country, subject, and industry. Specialized resource pages are available specifically for student use and for visitors researching South Asian cases. The Web site has been “designed to help professors search cases according to the topic areas they are currently teaching,” says Shirley Tan, research associate. “We are planning to update it to include more customized features to help them design a case pack for their courses.”

Other case providers also rely on technology to make it easy for professors to use their cases in the classroom. For instance, Harvard has devised a system called Course Planning, which helps professors pull together an online course that can then be ordered through a bookstore or a third party or delivered directly to students. Other providers offer a service that will match their available cases to a professor’s probable course outline, often by suggesting cases based on the chapter headings of standard textbooks within certain disciplines.

“It just makes it easier for the professor to find a case that goes with a particular chapter in a book he’s teaching,” says Beamish. “We’ve also started to organize our cases into themes. So if somebody wants a case that deals with ethics, for example, we’ve already done an advanced search on the topic.

Case by Case

As the popularity of the case method has increased, so has the need for fresh cases; today there are thousands available from suppliers all around the world. Some specialize, like the Asian Business Case Centre, which operates as a worldwide resource for cases about Asian companies operating in a global context or global multinational corporations operating in Asia. The comprehensive site also has an e-catalog that lists information about other case providers worldwide, although the center does not sell cases by other business schools.

By contrast, the European Case Clearinghouse carries more than 21,000 items obtained from a wide variety of sources: Harvard Business School, Ivey Publishing, Darden Business Publishing, and European schools such as Cranfield University, INSEAD, IMD International Institute, the Institute of Chartered Financial Analysts of India, and the Helsinki School of Economics. ECCH has a satellite office in the United States, located on the Babson College campus, which primarily distributes cases from European authors.

Most major case providers carry at least some works by outside professors, whether they carry whole libraries published by other institutions or single cases authored by individuals. “Certain professors at certain institutions have contacts at certain organizations and might be able to write rich cases that, as much as I wish we could, Darden can’t produce,” says Kathie Amato of Darden Publishing. “It wouldn’t be fair to our students to deny them that exposure, so we routinely buy cases from other institutions.”

While publishers like Darden and Ivey only offer cases that have passed their own internal quality assessment, ECCH accepts anything submitted to it. “The philosophy we adopt is that the authors’ names are going to appear on the front of the case, as well as the name of their institutions. And if it’s a substandard piece of material, it’s not going to be doing them any favors. Authors do receive modest royalties, but there’s more to be lost by submitting a substandard piece to us than there is to be gained. Therefore, we rely on a certain level of self-regulation,” says Jeffrey Gray of ECCH.

For the most part, case studies are designed to be used in graduate business classes, but they find their way into undergraduate classrooms, corporate training centers, and even the very rare high school class. As new cases about current intriguing situations continue to appear, expect their popularity—and their ubiquity—to continue.

“Many classic cases teach timeless lessons; but if they’re from the ’80s or the ’70s, students aren’t always tolerant of them. They want to know about things that are happening **right now.”** –Lisa Joy

People can download all the abstracts that might apply.”

The Internet has also provided an easy way for case providers to personalize the cases by presenting information on the authors. “We’ve started introducing short video clips of the author on our database,” says Gray. “You can come to the Web site and hear the professor who wrote the case talk for three or four minutes.” This brings the case vividly to life and connects the author who wrote the piece more directly to the professor who will be teaching from it.

Timeliness and Relevance

No matter how the cases are accessed or what format they’re in, today’s versions are apt to be current, global, and highly relevant. Students are less interested in outdated cases that might offer excellent lessons but deal with old or obsolete companies, say providers. They’d rather read about companies in the news this week. For instance, a case about Enron—including live clips of the top executives—was the lead item for months on Darden Publishing’s Web site.

“Students are used to having immediate access to research and knowledge,” says Joy of Harvard. Students like to go online to find additional information to support their analysis of a particular case, and that’s harder to do if the story isn’t a

recent one. “Many classic cases teach timeless lessons; but if they’re from the ’80s or the ’70s, students aren’t always tolerant of them. They want to know about things that are happening right now.”

Even when the business press isn’t ruled by one particular story, the waxing and waning popularity of specific business trends will influence what kinds of cases will be written and requested at any given time. Ten or 15 years ago, the European Case Clearinghouse was receiving a number of cases dealing with just-in-time management, says Gray. Now, cases on globalization, corporate governance, and ethics are arriving.

Other case providers say that topics like leadership and teaching negotiations have been popular in recently written case studies. Then again, certain topics like general management, strategy, and organizational behavior have an “ever-green” quality to them and are in demand no matter what the business climate.

Even when today’s cases are focused on current business trends, they tend to be shorter than cases were in the past. “While people still want cases with complexity, depth, and richness, they want them to be more focused,” says Amato. “While the cases are fully integrated, they’re more self-

The Case for Cases

While both media and topics have changed in today’s case studies, one thing remains the same: the passion with which devotees of the case study method view this educational tool.

“A case is about a real business situation faced by managers and is authenticated by a release from the company,” says Shirley Tan of Asia Business Case Centre. “It’s not hypothetical. It allows students to step into the real situation, understand the complexity of the context, and make a decision.”

Says Paul Beamish of the Ivey School, “Case studies give students a great opportunity to learn about individual industries, individual countries, and individual organizations by studying the kinds of problems they’ll often encounter in their careers. Professors use case studies to teach students how to devise rules for decision making that will allow them to tackle problems in a methodical and comprehensive fashion.”

In addition, the case method allows students a chance to test ideas—and learn from mistakes—in a safe environment, says Kathie Amato of Darden Business Publishing. She also believes that students who learn through the case study

method increase their ability to think through decisions once they’re in the corporate world, especially when they’re faced with morally ambiguous situations. “Because they’ve had to make decisions and discuss why they made these decisions, it’s so much easier when they’re out in the world faced with an ethical dilemma,” she says.

She describes a case she studied as a student, in which a company had to decide whether to recall a flawed product at a huge loss or continue to sell it at a profit. When students expressed horror at the very idea of selling a product with defects, the professor made the analogy that they were walking down a yellow-brick road.

Says Amato, “He told us, ‘Every time you make an unethical decision, even if it’s on a very minor matter, one of your yellow bricks turns red. Over time, all your bricks shift, and suddenly you’re not on a yellow-brick road any more, you’re on a red-brick road. The change happens one decision at a time.’ If his comments hadn’t come at the end of an hourlong debate, I don’t think they would have had the same impact. I would have felt I was being preached to. As it was, the case discussion was very compelling—almost a life-changing experience.”



contained. They can be taught in a class period. A teacher can start pulling more and more cases for assignments on a daily basis and add some interactive teaching.”

“I think the shorter cases are very much a response to the needs of executive education,” says Gray of ECCH. “Executives, particularly senior executives, find it unacceptable to have to read massive amounts of materials. So the whole emphasis is on producing high-quality material that’s much shorter in length and more easily usable by people in executive courses—though of course these cases are also usable by people in the MBA and undergraduate programs.”

Classroom Prep

While the case study can be an exhilarating experience for students, it can be intimidating for teachers—particularly those teaching cases for the first time. “One of the things that frightens new case teachers is, you don’t know what’s going to be said,” says Joy. “You get to class and you don’t know what curve ball is going to be thrown. Not only do you have to manage the discussion, but you have to lead it in a way that’s going to be productive.”

However, professors needn’t let their unfamiliarity with the process stop them from integrating case studies into their classrooms. All sorts of resources are available to help teachers become more comfortable with the case study format. First, many cases are accompanied by teaching notes—the author’s description of how the case should be used, what questions might be appropriate, and what kind of analysis might be expected.

“There’s also usually a what-happened section,” says Beamish. “What happened is what that particular company did. It may or may not have been correct. We try not to fall into the trap of saying, ‘Just because the company made this decision, it was the right decision.’ Clearly, it isn’t always.”

Books, articles, and workshops are available that introduce professors to the joys and hazards of teaching with cases. Gray recommends *Teaching and Writing Case Studies, A Practical Guide (Second Edition)*, written by John Heath and published through ECCH. He also notes that ECCH runs one- and

two-day workshops that introduce professors to teaching and writing cases. ECCH is also producing a DVD on the topic. Parts of the DVD were filmed at sessions of the International Teachers Program held at the Stern School of Business and The Copenhagen Business School. In addition, Gray suggests sitting in on a veteran teacher’s case study class, if possible, to watch how he handles the discussion.

And, as always, individual preparation is key. “You do need to spend a lot of time with the case study you intend to teach so you know it absolutely inside out,” says Gray. “You have to be able to handle it better than the best student you’ll be teaching. Professors say that when they’re picking up a case for the first time, they might spend upwards of 20 hours in preparation, going through the analysis and working it through, seeing what alternative methods of analysis present themselves in case a student ends up going down that road. You want to be able to respond rather than saying, ‘Well, I never thought of that.’”

A Case for the Future

While case studies have experienced a great deal of change already, some providers think more is in store. Primarily, the effect of digital media is likely to be profound in the coming years. “I think we’re just at the beginning of the impact that multimedia presentations are having on cases,” says Amato. “I think we’re going to see huge, geometric growth where we’re pulling all sorts of media into the case to make it a rich, even more active learning experience.”

Beamish expects to see cases used in more institutions worldwide. He recounts a tale of a visit made to Ivey 15 years ago by a group of Chinese professors who had never witnessed the case study teaching method before. “They thought it was very interesting but that it would never work in China,” he relates. “Fifteen years later, those same people are on a state education committee that has required 25 percent of classes in China’s business schools to be taught by the case method.” As a result, many of Ivey’s cases have been translated into Chinese—and Ivey cases are also available in French, Spanish, and Korean. “I think the internationalization of management education really bodes well for the case method,” he says.

Widespread availability, up-to-the-minute relevance, and easy access are combining to make the early 21st century a golden era for the case study method. As new delivery methods make case studies even more engaging for students, these reliable teaching tools are becoming even more dynamic and compelling methods for conveying the basic precepts of business. ■