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9B18M055

student guide to the case method: note 3—preparing to discuss a case

Susan J. Van Weelden and Laurie George Busuttil wrote this note solely to assist students with understanding and using the case method. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. The authors may have disguised certain names and other identifying information to protect confidentiality.

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A *case* or *case study* is a real business story that requires you to step into the role of a manager or a member of the management team that faces a dilemma, or the role of a consultant assisting an organization that faces a dilemma. Acting in that role, you are tasked with resolving the issues or problems that the profiled organization is facing at a particular moment in time. Alternatively, you are asked to evaluate and choose among opportunities that exist for the organization at a specific point in time. Those issues and opportunities may be confined to a specific discipline in business, such as accounting, marketing, human resources, or strategic management. However, the challenges often involve several disciplines, reflecting the multi-faceted nature of business in practice.

The case method involves learning by doing. It provides you with an opportunity to apply your knowledge and skills to real-life and realistic situations. Listening to class lectures, reading about various business subjects, and performing quantitative and qualitative analyses to solve well-defined problems are all valuable learning tools; however, management skills and knowledge cannot be developed by these methods alone. Management requires more than applying a storehouse of prepackaged solutions or standard answers. Each situation faced by management has its own variables unique to the situation. Using the case method provides you with valuable opportunities to develop and practise skills you will need in those situations.

1. Introduction to Preparing to Discuss A Case in Class

The method for a basic case analysis presented in Note 2 of the Case Guide Series—“Performing a Case Analysis,” No. 9B18M054—can be used for various purposes: discussing the case in class, writing a report, making a presentation, or writing a case exam. This note helps you to adequately prepare to discuss a case in class and to provide meaningful input to the class discussion. The guidelines in this note are for general use. You should always defer to your instructor’s requirements, which may differ or be more specific.

1. Prepare before Class

To benefit from many of the opportunities of the case method, you need to do your own analysis before class and make your own decisions based on that analysis.

Read the case once for familiarity and a second time to gain a full command of the facts, so you have good insight into the issues. As you read the case the second time, highlight the key points and make notes based on your assigned tasks. If questions about the case are provided in the course syllabus, they are intended to be used only as guidelines to identify the issues and some of the analysis to be done. You are still required to come to your own conclusions regarding the issues and relevant analysis.

In most instances, you are expected to do a full analysis of each case: identify the key issues, problems, or opportunities (collectively referred to hereafter as “issues”); analyze the issues using case facts and relevant business tools, concepts, and models; develop and evaluate some alternative solutions (again drawing on case facts and appropriate tools, concepts, and models); and recommend a course of action.

Prepare two or three pages of notes to take to class. These notes will give you talking points for the class discussion. Use your notes in class to keep track of the points your colleagues raise and to quickly identify opportunities to add to the discussion. As you track the discussion, you can formulate arguments to challenge your colleagues’ analysis of the case or to revise your own thoughts about the case.

Due to time or space constraints, your instructor might require only a partial case analysis. For example, you could be asked to focus only on identifying and analyzing the issues. Alternatively, the case might clearly define the issues, and you could be asked to only identify and evaluate possible solutions. Another form of partial case analysis is a “directed case,” in which you are directed to answer a specific set of questions about the case. In such cases, your preparation for class should focus on the partial analysis you have been directed to perform.

1. Contribute to In-Class Discussion

Your willingness to participate in the discussion of a case will enable you to consider a variety of viewpoints and insights, and thereby gain the full benefits of the class’s collective knowledge and experience.

In class, the instructor’s role is to facilitate discussion, often by asking questions. Students should do most of the talking, and you should be prepared to provide supporting reasons for your views. You are expected to show respect for others’ opinions, but you are also encouraged to challenge each other. Similarly, you are expected to be willing to submit your analysis and conclusions to scrutiny by others, without becoming defensive. Several good plans of action are usually possible, so do not refrain from taking and maintaining a minority position, provided you can defend your position using sound analysis. On the other hand, feel free to change your position and recommendations as others’ views emerge and a more complete range of information is assembled.

Due to time constraints, it is impossible to discuss every aspect of a case in class. Therefore, your instructor might steer the discussion in a particular direction, or the discussion might centre on only one or two steps of the case analysis; for example, identification and analysis of issues might be the focus of one case, while on another occasion, the issues might be clearly defined and your task could be to focus on developing possible solutions. Nevertheless, you are welcome to introduce additional ideas, other issues or a new alternative, for instance. Doing so will help to avoid feeling frustrated because some of your best ideas are not discussed. While your instructor might not be able to discuss your ideas to your complete satisfaction, you can enrich the discussion by noting additional aspects of the case that are worthy of more consideration.

Generally, the class as a whole will perform a more thorough and creative analysis than would be possible by any one person working alone or by any given small team of students. Therefore, do not be discouraged because you did not consider a particular solution. As new ideas are raised, be prepared to supplement or adjust your prepared analysis and recommendations.

1. Listen to others in Class

Listening to others in class is hard work. Use active listening techniques, apply listening etiquette, and refrain from activities that will prevent you or others from hearing what the speaker is saying.

* 1. Use Active Listening Techniques

Listen for the ideas the speaker is presenting, not just the words being spoken. Link what one speaker is saying to what others have already said. By doing so, you can build on their arguments or dispute their conclusions by making direct reference to their statements.

Listen critically for the main argument the speaker is presenting, so you can understand how the speaker’s argument differs from yours, and how the speaker uses case facts, concepts, and models in analysis. Recognizing the logic of the speaker’s argument aids you in structuring your own argument in response.

Active listening helps you build on analyses and arguments presented by previous speakers. Ask questions that clarify a speaker’s use of case facts, concepts, and models, and that clarify the conclusions drawn by the speaker. Briefly summarizing a previous speaker’s comments in your notes ensures that you have understood what a colleague has said. This summary can also help you to establish and refine agreement among class members at various stages of the case discussion process.

Avoid making judgments about a speaker’s ideas; quick judgments limit your willingness to hear what the speaker is saying, which can lead you to discount the value of your colleague’s contribution to the case discussion. Having preconceived ideas about what a speaker might say can cause you to tune out of the conversation; and when you tune back in, you could have missed a critical component of the speaker’s argument.

Finally, approach a discussion with an open mind: you might discover during the class discussion that you misinterpreted a fact or misapplied a concept or model, and that the analysis, alternatives, and recommendation provided by others is more appropriate than yours.

* 1. Use Listening Etiquette

Listening etiquette begins with focused attention on the speaker. Allowing colleagues to share what they have diligently prepared shows respect for the time they have spent preparing, and recognizes the value of their thoughts and contributions.

Give feedback to the speaker through your body language: maintain eye contact with the speaker, nod and smile when appropriate, and physically lean into the conversation. Show respect by allowing the speaker to completely finish speaking. A pause could simply be the speaker taking an opportunity to gather thoughts, not an indication that the speaker has finished talking.

Appropriate listening etiquette requires that you do not carry on side conversations while a speaker has the floor. Side conversations distract not only the speaker but also those around you, and could prevent a speaker’s ideas from being understood by the entire group.

Appropriate listening etiquette also requires that you not be distracted by electronic devices. Ensure that your laptop is open to your notes and the case. Turn off your cellphone and put it out of sight. When your attention is distracted by electronic devices, you also distract those around you and interfere with the collective understanding of the case.

Good listening etiquette helps you to develop essential management competencies, skills, and abilities. Your technical, analytical, problem-solving, and creative skills will be sharpened as you evaluate your own analysis against that of your colleagues.

1. Enhance the Quality of Your Class Participation

There is no one single way to earn high marks for preparation and participation. However, the following guidelines can enhance the quality of your class participation:

* Identify the most important issues, including those that might have been overlooked by those closest to the situation.
* Provide supporting arguments for any statements you make or conclusions you draw, but be clear and to the point.
* Share appropriate analyses; for example, bring your proposed organizational chart or your financial analysis on a flash drive, or at least be prepared to share a few key specifics of your analysis. This is a clear way to demonstrate your preparation.
* Come to a decision and be prepared to give your recommendations. Any analysis you have completed is of minimal value if it does not culminate in a decision.
* Participate in all phases of the discussion—identification and analysis of the issues, development and evaluation of alternatives, and development of an action plan.
* Interact with other students. Ask them to provide support for their arguments. State why you disagree with their opinion. Build on their analysis, but avoid merely repeating what they have said.

1. case analysis and academic integrity

Because case analysis is complex, it may often seem helpful to discuss the case informally or formally with other students before participating in a class discussion, writing a report, or making a presentation. Managers and consultants often discuss problems with other people, within the constraints allowed by confidentiality. Therefore, your instructor may allow, encourage, or even require such discussion. However, ***to ensure academic integrity and to avoid plagiarism, unless your instructor has specifically indicated that some degree of discussion is permissible, you should consult with your instructor before engaging in any collaboration***. This restriction on outside discussion is especially necessary when preparing reports and presentations.

It may also seem helpful to search the Internet for teaching notes for cases or for case reports or slide presentations prepared by other students. Academic integrity requires that you refrain from using such resources, in full or in part. Any attempt to use the work of others and to pass it off as your own is plagiarism. If the instructor is suspicious that plagiarism might be involved, you may be asked to upload a copy of your case report through Turnitin.com.

While using the work of others may appear to provide a shortcut to a good grade, the quality of online sources and the work of other students is often suspect, at best. Most importantly, you deprive yourself of the learning opportunities the case method offers.