Learning using Case Studies

Based on the book:

Learning with Cases, Mauffette-Leenders, Erskine, Leenders, 4th edition, 2007, Richard Levy School of Business

www.ivey.uwo.ca/cases

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WHY USE CASE STUDIES?

- A case:
  - Is a description of a REAL/ACTUAL situation i.e. field-based
  - Involves a decision, a challenge, an opportunity, a problem or an issue faced by a person or people in an organisation
  - Allows you to figuratively put yourself into the position of the person or people involved

- Why use cases for learning?

  Cases provide:
  - the student with a view of the real working world
  - a variety of settings for the identification, analysis and solution of different issues
  - a "laboratory setting" for management sciences
  - a tool to test understanding of theory, to connect theory with application, to develop theoretical insights
  - a vehicle for students to develop self-confidence and independent thinking in a discussion-based group situation, and to work co-operatively
  - a method to deal with new and complex situations encountered in the working world
  - an opportunity for self-learning and learning how to learn

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What is expected of you in using the case study method.

1. Take an active role in your learning
   - The output depends on your input
   - You must come prepared for class
   - You must contribute in your group by:
     - Teaching others
     - Actively participating
     - Taking risks
     - Learning from others

2. Follow a code of professional conduct
   - Create a climate of genuine respect, trust, and openness
     - Conduct yourself civilly towards your peers
     - Openness to diversity
     - Respect for confidentiality of case discussions and notes

3. Commit Yourself to ongoing learning
   - Commitment to continuous learning, in groups and in class

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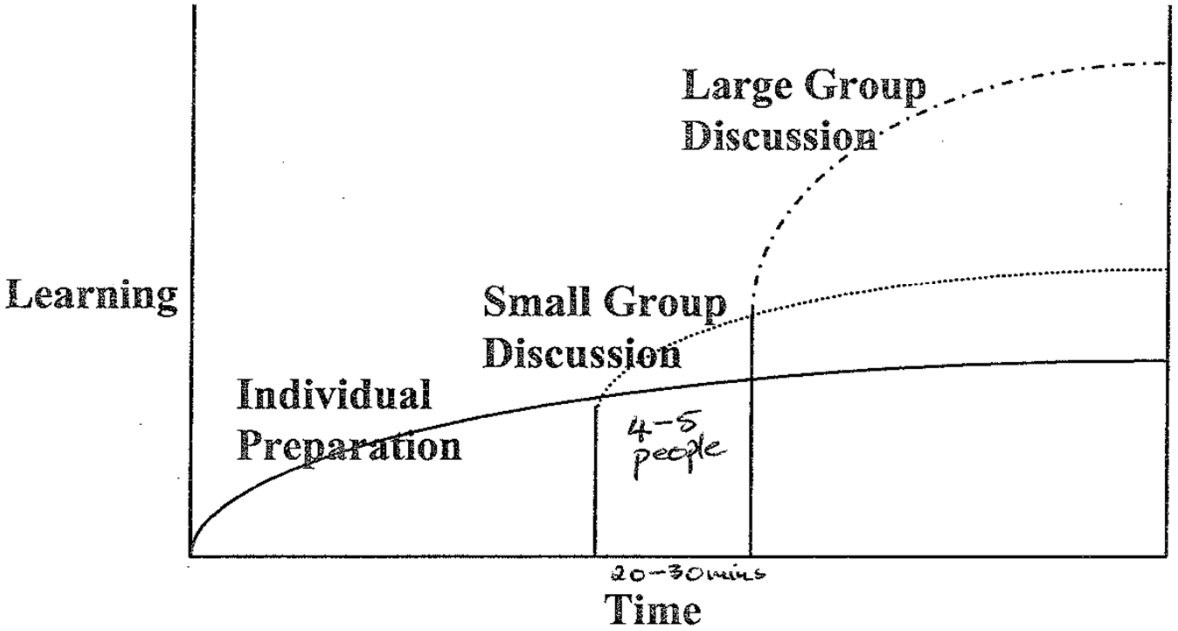
Overview of 3-stage process

- Individual Preparation
  - Short-cycle process
  - Long-cycle process
- Small Group Discussion
- Class or Large Group Discussion



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Individual preparation

- This is the foundation of case learning
- It is a pre-requisite for the 2nd and 3rd stages
- It is hard work!

- Case Assignments (p30-31)
  - Standard Case Question
    - "If you were in Mr Jones's position what would you do and why?"
    - You need to take the role of Mr Jones bringing you knowledge and understanding to the role
  - Other Types of Assignments
    - Usually address specific course related material
    - " Do an consumer analysis of the gadgets. Draw an organisational chart. Prepare two pro froma financial statements. Draw process flow diagrams"

- BUT, learning does not stop at the answering of the assignment questions as the real issues may extend beyond the prescribed questions

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THE SHORT-CYCLE PROCESS

- Helps you get a good sense of the case

- <u>Step-by-step process: (p33-34)</u>

1. Read opening and ending paragraphs
2. Who? What? Why? When? How?
    1. Who is the decision-maker I must identify with? (position, title, responsibilities)
    2. What appears to be my issue (concern, challenge or opportunity) and what is its significance for the organisation?
    3. Why has my issue arisen and why am I now involved?
    4. When do I have to decide, resolve, act or dispose of this issue? Is there an urgency?
    5. How do I position this case on the Case Difficulty Cube?
3. Take a quick look at the case exhibits (graphs, tables etc)
4. Do a quick review of the subtitles of the case
5. Skim read (First sentence and last sentence of paragraphs)
6. Read assignment questions and reflect
7. Complete the case preparations sheet

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THE LONG-CYCLE PROCESS (P35-57)

Two major parts:

1. Detailed reading of the case
   - General case structure
     - Opening paragraph
     - Organisational Background (structure, products, industry, services, history etc)
     - Specific Area of Interest (marketing. Operations, finance, systems etc)
     - Specific problem or decision required
     - Possible alternative solutions/decision (depends on case difficulty)
     - Conclusion (includes task and deadlines)
     - Exhibits
2. Step by step case solving process (Case Analysis)

– refer to case preparation template

1. Define the issue
2. Analyse the case data
3. Generate alternative solutions
4. Select the decision criteria
5. Assess the alternative solutions
6. Select preferred solution
7. Develop a project plan (actions and timelines)

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Case Analysis – issues

- Immediate Issues/Problems
  - Refer to the specific decision, problem, challenge or opportunity faced by the decision-maker - must be resolved in the given timeframe
- Applicable Theory
  - Larger and more general i.e. conceptual content and design of the course
  - E.g. "make or buy"; design of information systems; organisational roles and responsibilities etc
- Prioritising the Issues
  - places the issue on a priority list and will impact the decision-making criteria, resources to be utilised, finances to be spent = contextualizing the issue in the case
  - Importance
    - Is the issue of strategic importance to the organisation or not? i.e. Is it a "make or break" issue? Can it provide competitive advantage? Does it have a significant impact of profits? Does it significantly affect staff morale or corporate reputation? Etc
  - Urgency
    - Is the issue critical and must be dealt with immediately or can it wait a while?

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Analysis of case data

- Cannot just use space on preparation sheet – needs many extra pages!!
- **Takes time** individually and in the group sessions
- Is **vital** to generating alternative solutions and establishing decision criteria
- Requires the use of the analytical tools presented in the course e.g. frameworks, concepts, techniques, practices, theories – this is where the students understanding of the field is demonstrated.
- Problem solving in the case analysis usually involves:
  - Causes and effects; root causes
  - Constraints and Opportunities (money, people, materials, equipments, facilties, management system)
  - Quantitative and qualitative analysis
    - ***Be careful not to just do calculations because the data is given – there must be a good reason for doing calculations and using the data***

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ALTERNATIVES AND DECISION CRITERIA

- **Generating possible solutions** involves
  - attempting to remove the cause(s) of the problem(s) by developing a number of different ways to address the issues
  - Creative and broad thinking
  - Being inclusive of all possible alternatives
  - Using your own knowledge and experience
  - Developing realistic and plausible solutions
  - Considering the status quo as an alternative

- **Decision Criteria**
  - Provide a basis for evaluation or assessment of the alternatives
  - Can be quantitative (e.g. profit, cost, risk, market share, inventory turns, growth rate, quantity, delivery time, productivity, capacity staff turnover etc) **or**
  - qualitative (competitive advantage, customer satisfaction, safety, visual appeal, cultural sensitivity, obsolescence, flexibility, ethics, corporate image goodwill, employee morale etc.)
  - Are selected based on what you believe are the objectives or strategy of the organisation, and by a sense of what is important to the decision-maker
  - Should be realistic

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Assessing alternatives

- Compare alternatives by
  - Listing advantages and disadvantages of each
  - Then weigh these pros and cons against each other
  - Contrasting each against the decision criteria – you can use a matrix
  - Use symbols such as High, Medium, Low to populate the matrix
  - The criteria can also be weighted

	Decision Criteria				
Alternatives	Cost	Time	Safety	Flexibility	Image
1					
2					
3					
4					

- Short vs Long-term considerations
  - What applies to each alternative
  - Quick wins
  - Better long-term benefits vs no short-term

- Predicting Outcomes – scenarios (use decision-tree diagrams)
  - Best, Worst, most Likely outcome
  - Future benefits, results
  - Uncertainty and risk

- Selecting a solution
  - May be obvious if all the preliminary analysis has been done thoroughly,
  - that is, you have created a **logical and feasible route to the answer** you are providing
  - based on the available information in the case, your theoretical knowledge and your experiential knowledge

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Working on cases in a Small group

- Group organisation
  - Size = 3-5 people
  - Composition = variety of skills, cultures, experiences, expertise (diversity)
  - Rotation = group composition can be changes very 5-6 weeks (if required)
  - Time = 20-30 mins per case (only if all members have done their individual preparation thoroughly, otherwise these session become working sessions and are much longer)
  - Timing = convenient to all and close to large group discussion
  - Location = convenient to all

- Small group guidelines
  1. Each person attends the discussion and is fully prepared
  2. Each person participates actively in the discussion
  3. A leader, as a decision-maker, is not necessary
  4. Not necessary to take minutes
  5. Consensus on the group position is not usually required
  6. Establish and stick to the discussion time limits

- Small Group Process
  1. Do a quick review of the short-cycle process
  2. Review the conclusions from the long-cycle process
  3. Review special difficulties
  4. Anticipate class discussion

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Large group process (Chapter 5)

- This is mostly facilitated by the lecturer
- The role of the student is
  - To be an ACTIVE PARTICIPANT in the class discussion
  - To learn through LISTENING, TALKING and REFLECTING
  - To commit to the "4Ps"
    - PREPARATION = do your homework
    - PRESENCE = attend class
    - PROMPTNESS = be on time
    - PARTICIPATION = be involved in the discussion
- Effective participation involves
  - Content contributions
    - from your individual and small group preparation
    - Contributing quality rather than quantity
  - Process contributions
    - Are based on listening and reflecting skills, and understanding of the case
    - Being polite and raising your hand
    - Include:
      - questions at add clarity,
      - suggestion that a certain part of the case should be explored
      - Linkages to points made earlier
      - A call to order if the conversation has gone off the topic
      - Meaningful summarization

Ethical Considerations:

- Your class notes are personal and should not be shared with class members
- Do not discuss the case with future classes
- Never attempt to get the lecturer's teaching guide
- Do not contact the organization/company featured in the case

Note-taking:

- not a word-for-word recording of the discussion
- short phrases or words to remind you of important points made in the discussion and summaries of your thoughts

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Case reports and exams (Chapter 6)

- Reports – written
  - Will depend on the nature of the case and your analysis, but will generally include:
    - Title page
    - Table of Contents
    - Executive Summary
    - Issue Statement
    - Data Analysis
    - Alternatives Analysis
    - Recommendations
    - Action and Implementation Plan
    - Exhibits

- Case Exams - Where the case is handed out at the start of the exam
  - Manage you time wisely
  - Complete the short cycle process
  - Start the long-cycle process with a piece of analysis that gives you confidence
  - Think about how you will present your analysis before you start writing
  - If allowed, you may wish to bring in notes and other materials, but these are seldom useful

- Case Exams - Where the case is handed out ahead of time
  - Prepare using the individual preparation process (short and long cycle)
  - Try to anticipate the types of questions that can be asked and what analysis will be required
  - Review cases done in class that may be similar
  - Make detailed notes of your answers to all anticipated questions, analyses. Organize these carefully.
  - Meet in your small group, if allowed.
  - Tailor your answers in the exam

- Case Exams – suggestions that apply to all types of case exams
  - Find out the expectations of the lecturer
  - Plan your time according to the mark allocations
  - Ensure that your analysis answers the questions
  - Do not bring someone else's notes to class or the exam
  - Do not indulge in digressions – stick to the points
  - Support your recommendation quantitatively, where possible
  - Hand in all you exhibits and calculations
  - Refer to theory or real life practice, if applicable
  - Be consistent
  - **Success = good preparation and class attendance**

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