# THE USE OF CASES TO STIMULATE DISCUSSION AND INSPIRE STUDENTS TO WRITE PUBLISHABLE, USABLE AND INTERESTING CASES.

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## ABSTRACT

*This paper has four distinct purposes. First it addresses why cases provide a viable method to stimulate learning. Second, it provides ideas that can be utilized to effectively use cases in the classroom setting. Third it addresses the importance of live cases. Finally, it provides some direction and ideas that may prove useful in getting students to write publishable cases. Using processes presented in this paper, the author has had success in winning awards of the best student authored case of the conference on a couple of occasions. In addition, the author has been able to get students published by moving the conference case and getting it published in peer reviewed journals.*

## INTRODUCTION

Within the business school, Harvard has effectively utilized the case method. Many other business schools have also adopted this method of learning. Using the case method provides students with an issue and/or opportunity that can be utilized as a proxy to actually working within an organization. As with real life, some issues presented in the case may be relevant and others may not be. It is an important skill to be able to understand the true problem rather than just a symptom. The student is required to complete an analysis to come up with problem(s) and then (s)he is required to come up with alternatives, recommendations and an implementation plan. In this paper the following questions are addressed:

1. How can cases be effectively utilized in a classroom setting?
2. Why is it important to do live cases?
3. Writing up a case and Instructor's Note

## EFFECTIVE UTILIZATION OF CASES

Prior to class, the student should prepare the solution to the case. Students can be given a case analysis guide to provide them with some ideas. A case analysis template is found in attachment 1. First, the student should read the case all the way through to obtain an overall understanding and to see the larger picture. Then the student needs to go back over the case to identify key points, thoughts and ideas from the case. Next, the student should utilize the case analysis template and complete the exhibits. Then utilizing information from the case and information and conclusions the student can ascertain from the analysis, the student can write up a short report providing summary information on the problem, alternative and recommended plan of action.

During class, the student, will first share his/her findings with teammates. This is an important step as a great deal of learning takes place in these team discussions. The professor, can mingle among the students to answer questions or provide direction. After 10 to 15 minutes of class discussion, get the groups to present their findings to the rest of the class. This generates very useful case discussion at the class level and helps students integrate learnings.

## LIVE CASES

Working with local companies near the university provides a benefit to the businesses and also to the student. The student has the opportunity of working on a real problem and providing advice to the business owner. The business owner has the benefit of a free consulting report and also a feeling of achievement that (s)he has given back to the community.

The student team is required to find a local organization that may have a problem to be addressed. Once the business is found, it is approved through the instructor. The student then interviews the owner and anyone else that needs to be interviewed and will complete the analysis and provide the owner with a report on the team's findings.

## WRITING THE CASE AND THE INSTRUCTOR NOTE

Since the situation in the case has occurred in the past, all cases must be written in the past tense. This is a hard concept to get students to understand and apply as we are usually talking about the present and or the future. However, to have a case have the opportunity of getting published, past tense must be used throughout the case. For example if you are investigating a company in Atlanta GA, the appropriate way to state it in the case is "XYZ Inc. was a company that resided in the city of Atlanta." This statement does not suggest that the company is no longer there, rather it states that at the time of the case that is where the company was.

Writing a case is similar to writing a story. It is important to have a hook to catch the readers' interest. Then the case should build and end with a strong conclusion. It is important to identify key individuals and build enough information around those individuals where the reader can identify him or herself with that individual.

To help students understand good case writing, have the students critically read the cases used in class or the cases that are utilized at the end of a chapter. Get the students to identify what they liked about the case, what they disliked and what additional information would have been useful. This should be done throughout the semester.

At the end of the semester, when the student team is writing the live case, the team members can pattern their case after some of the better cases that they read. I have the students submit a first draft of the case and I act as a reviewer to provide the team with ideas or suggestions on how to improve the case. The grading template that I utilize is in Attachment 2. The team is then required to revise the case based on the instruction they are provided.

Once the case has been written, the student team has to provide an instructors note or a solution to the case. A template of the categories that should be addressed are found in Attachment 3. Since students are not educators, I can't expect them to fully understand how an instructor may utilize the case during a class discussion. However, I want them to make an attempt at writing the instructor's note. What the team does have the capability of doing is providing information on how to analyze the case using tools such as SWOT, Five Forces and the Resourced Based View of a firm.

On the final case submission, the team needs to submit:

1. the revised case,
2. A word document that provides steps the team took to correct deficiencies on the first draft,
3. The Instructor's note
4. The report the student team gave the business owner
5. A paper signed by the business owner allowing the case to be published.

The above completes the students' requirements for the course. After the course is completed, the next step is to find the better cases and then work closely with students who wrote those cases to improve the case to the point where it can be submitted to a case conference. If the case is accepted for presentation, additional work is done to improve the case based on reviewers' comments and the revised and updated case is then placed on the program of the conference. The student(s) attend the conference with the professor to obtain live feedback on how to improve the case. The case can then be re-worked so that it can be sent to a journal.

Using this process, my students have twice won the best student authored case of the conference. On another year, the students' case was selected as the feature case of the conference. In addition to those achievements, some student developed cases have also been accepted at the North American Case Research Conference (NACRA). The real good news story is to date four cases have been published in case journals.

## ATTACHMENT 1
## CASE GRADING TEMPLATE

Analyze the assigned case and in a two to four-page write-up, identify the problem(s) the firm is facing, the effectiveness of their current strategy and make recommendations on how to remedy. (Hint: Use information gathered on RBV (VRIO), Financial Analysis, value chain, 5 forces and any other appropriate tool – Exhibits 1-4). The information above requires an understanding of the mission and objective of the organization and the impact of the industry and general (macro) environment.

In future cases, it also requires an understanding of strategy formulation In addition, to coming up with recommendations, identify how these recommendations should be executed. Familiarity with the tools will provide you with the ability to synthesize and apply the information in determining the problem or problems and come up with appropriate recommendations. The use of these tools will provide you with skills required in the workplace to fully understand the real problem.

It is recommended that after reading the case a few times, you complete the exhibits and then after analyzing information on those exhibits, you will be ready to write the two or four pages.

## EXHIBIT 1
## FIVE FORCES

**(Explain the powers of these forces and explain why)**
**Power of Rivalry Level of power is <u>high/medium/low</u>. Now explain why?**

**Power of Buyer Level of power is <u>high/medium/low</u>. Now explain why?**

**Power of Supplier Level of power is <u>high/medium/low</u>. Now explain why?**

**Power of New Entrants Level of power is <u>high/medium/low</u>. Now explain why?**

**Power of Substitutes Level of power is <u>high/medium/low</u>. Now explain why?**

## EXHIBIT 2
## GENERAL ENVIRONMENT

**(Explain the powers of these forces and provide a rationale on the impact)**

## EXHIBIT 3
## VRIO (RESOURCED BASED VIEW OF A FIRM)

Fill in the attached VRIO form. The first column is to present the resource or competency of the company; the other columns are there for you to make an assessment of whether that resource (competency) is valuable, rare, and difficult to imitate or substitute and whether the organization is organized to exploit that competency.

| **Competency or Resource** | **Where on value chain** | **Val-<br>uable** | **R<br>are** | **Difficult to imitate or substi-<br>tute** | **Org to Exploit** | **Type of Advantage*** |
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*** Sustainable Competitive Advantage = SCA; Temporary Competitive Advantage = TCA; Competitive Parity = CP; Competitive Disadvantage = CD**

Complete a dupont analysis. Calculate:
ROA
ROE
ROS
QUICK RATIO
CURRENT RATIO
CASH RATIO
TIE RATIO

Calculate growth rates over a period of years for
ASSETS
REVENUE
PROFITS
EQUITY
*EPS*

## Attachment 2 – How the Case is graded

| Case - | Students: | | |
|---|---|---|---|
| | **Points** | **Tentative Earned** | **Comments** |
| Professional? Good writing style, succinct, grammatically correct etc. | 25 | | |
| Where could the case be used?<br>- Strategy Concept<br>- External Environment<br>- Internal Environment<br>- Business Level Strategy<br>- Corporate Level Strategy<br>- International Level Strategy<br>- Managing innovation<br>- Strategy Implementation | | | |
| Company History | 10 | | |
| Does it have a hook? does it build? Good discussion of Industry competition? Does it include sufficient discussion of specific competitors? | 40 | | |
| Sufficient information to identify General Environmental concerns? | 10 | | |
| Quality of Case questions? | 10 | | |
| Sufficient background to answer Case questions? To complete a 5 forces, VRIO, Value Chain? | 40 | | |
| Sufficient Financial information (if available) | 15 | | |
| Is there sufficient information to address Implementation issues? | 20 | | |
| Other supporting resources - Graphs, Tables, Maps, Pictures etc. etc. | 15 | | |
| Quality of References | 15 | | |
| Total | 200 | | |

## ATTACHMENT 3
## THE ____ CASE INSTRUCTOR'S NOTE

## SYNOPSIS

This section provides an overall of the learnings expected from using this case and can include some background on the case and even address some of the abstract.

## RESEARCH METHODS

Case was developed using primary data and was based on an actual business using primary data sources.

## APPROPRIATE COURSES

The case could be used within an entrepreneurship class. It could also be used in a strategy class for a discussion on new venture development and implementation.

## LEARNING OBJECTIVES

Students should

1. Understand the challenges involved in running a family owned business.
2. Apply strategic management principles in understanding the issue.
3. Integrate knowledge from one discipline to another to identify problems and come up with appropriate recommendations.
4. Apply knowledge in identifying an appropriate implementation strategy.

## THEORETICAL FRAMEWORK

1. SWOT
2. Resource Based View
3. Implementation processes
4. Other _____________

## SUGGESTED CLASSROOM TEACHING APPROACHES
(First two to be completed prior to class)

Have students read the case and answer the following questions:

1. Is there a demand for the product?
2. Do the owners have sufficient capacity to meet the needs?
3. What are the problems? (Have students complete a general environmental analysis, five forces analysis, financial analysis, resource based view analysis and value chain analysis plus a SWOT analysis.)
4. Come up with alternatives and a recommended plan of action.

During the class period:

1. Break the students into groups to discuss the case and the solutions and issues each team member came up with. Have student groups present to the class.
2. Encourage discussion and critical thinking

## CASE ANALYSIS

- The authors then provide solutions to the questions above by completing:
- General Environment Analysis and how it impact the firm.
- A Five Forces Analysis
- A Resourced Based View Analysis or VRIO
- A SWOT Analysis
- Identifying alternative solutions
- Providing a recommendation and a detailed implementation plan.