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THE USE OF CASES WITH ROLE PLAYS IN A RESEARCH METHODS COURSE

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ABSTRACT

A combination of educational techniques are blended to accomplish the learning objectives of a class in research methods. The traditional reading assignment, written case, and case discussion are followed by role playing. The role play encourages student participation via a special briefcase technique. The briefcase contains any data or report needed by the participating student to resolve the issue of the case, if the student realizes it is needed. The instructor assumes the role of the decision maker to guide the participating student to the proper conclusion and the achievement of the objectives of the class.

BACKGROUND

"Research Methods for Management" is a required course for all business school students at Lawrence Institute of Technology. A major part of the course is a group project which includes problem definition, secondary and primary data collection techniques, subsequent tabulation and analysis, and concluding group presentations to the class.

For example, in one class we studied the value of promotional shows, such as art shows and dog shows, for a regional shopping center. The shopping center manager visited the class once to explain his concerns to the students, a second time to answer their questions, and a third time to hear their reports. The students began their secondary data search after the first visit. After the second visit each group had to develop its own specific definition of the problem. They then designed the actual research effort which included an in-person questionnaire to be administered at the shopping center. The tabulation, analysis, and concluding group presentations followed. All these activities must be accomplished within a ten-week-quarter term.

PROBLEM

This time restriction requires that the early topics of the course be covered quickly, retained by students, and then applied during the research project. Three of these early topics are:

1. a multi-step decision-making model,
2. the problem definition stage within this model, and
3. concepts of research design to assist students in developing the group research project.

In the past I have used the text-and-lecture method to cover these topics. The students would then proceed to undertake their group research project. When their presentations were made and they had tuned in their papers, it was obvious that some points made during the lecture had not been adequately understood.

For purposes of illustration let me restrict my discussion to step two of the early topics, the problem definition stage. Several aspects of problem definition which I feel are important and which were not being understood to the degree desired when the text- and-lecture

method was used are, (a) the role and necessity of the background investigation or preliminary study in conducting business research, (b) the necessity of good communications between the researcher and the decision maker, (c) the desirability of quantifying the problem definition where possible, and (d) the link between problem definition and research design.

My problem was to make points such as these initially understood and then remembered so that they would be used by the students during their live case research problem.

METHOD

The technique that I use now evolved slowly and somewhat by accident. It follows this format:

1. a reading assignment,
 2. an assigned case for written evaluation, and
 3. class discussion of the case which includes:
 - (a) a typical student-in-classroom discussion of the questions in the case, followed by,
 - (b) a role play of the case in which I play the decision-maker's role, apart from my teacher role, and where each student has a special briefcase "containing any data or report needed" to be used during the student's role play.
- (1)

This last step, 3(b), is the key to my approach. It is different from the more typical approaches in two ways. First, I step outside my teacher role and become vulnerable in that I have to use the decision-maker's knowledge and reasoning as my source of authority rather than my authority as teacher. Students are free to say anything to him they might not feel free to say to me as teacher. Secondly, the special briefcase technique avoids having to continually ask students, "What other information do you need to help you solve the problem?" As the role play proceeds, the conversation leads them to "finding" the right data in their special briefcases. In the role play they are not put in a defensive posture but rather find themselves participating as responsive volunteers.

Four cases are used to develop the three topics. (2) Each case aids in developing at least two of the three topics. I will use the Central City Reporter (A) case to illustrate my approach as it applies to the four aspects of problem definition noted above, including the link to research design.

Central City Reporter (A)

This case appears in a marketing research text in a chapter titled "Forms and Questions." (3) The case involves a newspaper owner-publisher who wants to know whether to publish complete stock market quotations on a daily basis in his newspaper. At present some stock market news is carried in the paper every day while the Sunday paper carries the complete stock market report of the previous week. A marketing

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research firm is hired and a telephone survey, via random selection of telephone numbers, is undertaken. The survey instrument used is presented in the case and appears here as Figure 1.

The questions for discussion which are presented as part of this case are:

1. Comment on whether the questionnaire is adequate to meet the purposes outlined above. Suggest any changes in the questions or their sequence.
2. Was too much information sought in terms of the objectives discussed above? Justify.

The solutions manual states, "the actually-used-instrument (the questionnaire) is fairly well composed and was easily administered by telephone. As students may be prone to look for faults, it is well to start with the positive. Then identification of faults may be called for."

Classroom Use

The assignment for this case is to answer the above questions. The preceding lectures have been on problem definition. My objective is to have them realize that a correct problem definition statement would have led to a quite different research design than that given in the case. Further, that this problem definition statement requires awareness and use of the points (a) to (d) of problem definition developed above.

The class is begun by collecting each student's written case analysis. This is his or her "ticket" to class. It is each one's commitment to a certain position. As learning occurs, the students will reluctantly change their commitments and accept the position that a better way was possible.

Students are now asked to respond to the case questions. Typically some students criticize various aspects of the questionnaire. I take the opposite view and defend the correctness of the questionnaire. Other students add their critical comments including some to the effect that the questions do not provide data to answer the owner-publisher's question. Slowly I begin to accept their criticisms which are contrary to the case authors' solution in the teacher's manual. The class senses victory and success. I ask for their suggestions for improvements. Many are presented.

This sets up the situation for the role play. In a sense, the students have been set up also. I recognize that this may be objectionable to some educators. Actually, the situation could have been avoided by the students had they understood and developed the points that will be set forth shortly. To this sense then, they have not been set up.

I now change to the role play by stating, "OK, we have had several good ideas. Now let's put them all together. Assume I am the owner-publisher and you are the research team. You have reworked the questionnaire and have analyzed the results. Further, assume you have a special briefcase which contains supporting data for all the points that have been discussed in class, as well as any other data or report that you might need. Present your findings to the owner-publisher."

If this were the first case in the term, I would take time to further explain role playing. At this point, however, I ask only if they understand the use of their special briefcase, i.e., that they can assume they have done their study and the briefcase contains any data or report needed to help them with the case.

Typically, students recall questions from their written comments and results from the special briefcase to the effect that people, "want the stock reports on a daily basis." And, "Stock traders, as opposed to owners, would like the report on a daily basis." Also, "A high percentage of Central City residents work at companies who have stock plans and they would like to see the daily reports." To these comments the owner-publisher replies with a noncommittal, "Very interesting."

Further reports are offered to the effect that "their new survey" indicates, "readership will increase with the inclusion of the stock market report on a daily basis." To this the owner-publisher responds, "We'll lose money if that happens. It will cost money to prepare that section and more money to print it. Besides, even now it costs us more money to get out each paper than we are able to charge for it."

Now we have confusion. Subscribers and potential subscribers want the stock quotations on a daily basis and circulation will increase, yet the owner-publisher is not happy. What does he want? Other suggestions are offered without success.

At an opportune point the owner-publisher responds, "When I consider publishing, or not publishing, a feature or section, I want to know its effects on the bottom line, not just whether circulation increases." This hints strongly at the idea that papers need advertising revenue to prosper. A few students may pick this up; most will not.

Eventually the link between features, specific readers, and specific advertisers must be developed. Slowly it will dawn on someone that a statement of the problem in terms of additional revenue from present or potential advertisers is a clearer and more quantitative form for stating the problem. This new statement of the problem will, in turn, lead to an entirely different research design; i.e., attempting to quantify the increase in advertising revenue likely to occur from businesses trying to reach the type of person who would be reading the daily stock quotations. The instructor, in the role of owner-publisher, must use questions and comments to bring this about.

Eventually the students realize what has happened. They had been following a course of analysis that could not succeed because the researchers in the case had not addressed the problem correctly. Their earlier criticisms were accurate but irrelevant. Since some students may still want to seek solace in the accuracy of their earlier criticisms of the questionnaire, the futility of such a position must be made clear; i.e., accurately criticizing a poor instrument used to solve a misguided statement of the problem will not lead the decision-maker to a good course of action.

To make sure everyone understands the lesson objective the discussion and role plays must be debriefed and reflected upon. The researchers in the case apparently did not recognize the importance of advertising revenue in the operation of a newspaper ((a) above, the background study). Similarly, the owner-publisher apparently assumed the researchers knew their business and left them alone too long, while the researchers neglected to review their questionnaire and mock results with the owner-publisher ((b) above, the lack of communications).

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Even if subscriptions would go up, how great an increase would be necessary for this to be acceptable? This had not been quantified by the researchers. Moreover, it is simpler to quantify the problem definition in terms of cost vs advertising revenue, ((c) above, quantifying the problem definition). And, finally, we will now likely survey potential advertisers, not consumers, ((d) above, the link between problem definition and research design).

A copy of a local paper which carries the daily stock prices will demonstrate the difference in the advertising in the financial section as compared with that carried elsewhere in the paper.

SUMMARY AND CONCLUSIONS

A class experience such as this remains quite vivid in the minds of the students.

Several significant differences exist in this approach which I believe have led to the apparent success experienced when using it. First, the combination of methods (text, case, discussion, and role play), reinforces each point with a synergistic effect. Secondly, writing the case questions requires the student to make a commitment beyond that of only reading the case and being prepared for class discussion. Thirdly, the special briefcase technique allows the student a different way of saying, "This is what I would have done," or, "He should have. . ." It also prevents the student from using a, "We don't know if..." type of statement. In addition, the student is not put in a defensive position by having to answer a specific question directed at him or her in particular. The special briefcase can be as useful as the students make it by their creativity and insight. Fourth, with the instructor playing the role of the decision-maker, the role can be controlled and directed to be sure the learning objectives are covered in exactly the sequence desired. Typically ten or twelve students in a class of thirty or forty students will volunteer and "challenge" the "decision-maker" during the role play.

LIMITATIONS

While this approach has many strengths, some limitations are present which should be brought to the attention of anyone who might wish to use it. First, a few students still think of me as the teacher in the role play. The number who continue to think this decreases as we get into the second and third case. Still, if students have been in one's classes before, their mental set of you as the instructor may persist. I have found that using a name tag on a desk, or changing my voice or mannerisms helps them to identify the role. Secondly, if the course involves multiple sections in the same term, students may hear from others as to how the case was developed. If I find this to be happening, I simply mention in a quiet way that I would prefer them not to discuss the case with students from later classes as this spoils the educational experience for them. Thirdly, it helps if the cases selected to be used in this manner have an apparent answer that can be developed and then "altered" in the role play. Not all cases lend themselves to this aspect of this technique.

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FIGURE 1
Newspaper Feature Study
Midwest Research Associates, Inc.

Hello, This is Mrs. _____ of Midwest Research Associates. We are making a study of people's awareness of features of our local newspapers. I want to emphasize that we are not selling anything. I just want to ask you a few questions. For example....

1. Have you noticed whether any of the local newspapers carry....

	No	DK	Yes	Which one (s)?	Daily or Sunday
a. Drew Pearson's column	_____	_____	_____	_____	_____
b. Complete stock market quotations? (If "daily")	_____	_____	_____	_____	_____
i. Of course, the _____ carries some market news every day, but have you noticed whether any newspaper carries <u>complete</u> stock market prices daily or Sunday?					
c. Color Advertisements? (If "Yes")	_____	_____	_____	_____	_____
i. Can you tell me when you saw the most recent one? _____					
ii. What was it about? _____					
d. National weather map?	_____	_____	_____	_____	_____
e. NY Times News Service?	_____	_____	_____	_____	_____
f. Book review section?	_____	_____	_____	_____	_____
2. a. (Ask only if "No" or "DK" to 1B) Am I correct that you said you did not know if any local newspapers had complete stock market coverage? Of course, none do, on a daily basis. However, were you aware that the Reporter carried stock market prices on Sundays? _____ No _____ Yes

b. (Ask only if "No" or "DK" to 1c) Let me check your answer about color ads. Of course, none of the local newspapers carries such ads every day, but the Star does carry such ads occasionally. Were you aware of this? _____ No _____ Yes
3. Which local newspapers do you read? How long (years)?

_____ Reporter _____ Star _____ University News _____ None
4. Finally let me get some classifying information so that we can combine your answers with those of other people.
 - a. How long have you lived in Central City? _____ years
 - b. What is your approximate age? _____
 - c. Highest grade of education? _____ Grade _____ H.S. _____ College _____ Post Graduate
 - d. Do you own any common or preferred stock? _____ No _____ Yes
 - e. Sex _____ Male _____ Female

Name _____
Phone _____

Date and time _____
Interviewer _____

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