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**STRATEGIC MANAGEMENT AND THE CASE METHOD:
SURVEY AND EVALUATION IN HONG KONG**

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ABSTRACT

This study reports the findings of a survey of Hong Kong lecturers who teach strategic management to undergraduate and postgraduate students. The survey focused on Hong Kong lecturers' objectives, their intentions in using cases in the teaching of strategic management and the effectiveness of the case method in accomplishing those objectives. The problems as well as difficulties associated with the case method are also identified. In addition, the strengths and the weaknesses of other methods such as lecture, guest speakers, videos, and business games, etc in the teaching of strategic management were identified. They suggest the propensity of lecturers to use a mix of methods.

INTRODUCTION

The case method plays a major role in the teaching of strategic management (Alexander, et al, 1986). The subject of strategic management is supported by many texts with accompanying cases (lengthy descriptions of companies and their external environments within certain industries). They provide a common rationale for the use of cases in teaching strategic management. Mintzberg, Quinn and Yoyer (1995) regards case material as " a rich soil for investigating strategic realities". This can be accomplished through description of strategic situations and through students' development of prescriptive analysis. The case is also used to illustrate that "there is no one best way to manage and no one managerial style is infallible" (Mintzberg, Quinn, and Yoyer,1995).

Similar justifications are also provided in other popular text books with cases included: "to simulate the reality of the manager's jobs" (Jauch and Glueck, 1988); to "provide an opportunity to analyze the strategic issues of specific

organisations in depth and often to provide solutions" (Johnson and Scholes, 1993); and to "help substitute for on-the-job experience and "force [students] to come up with pragmatic managerial action plans to deal with the issues at hand (Thompson and Strickland, 1999).

THE CASE METHOD

The case method can be applied to a wide range of teaching styles and objectives (Gray and Constable, 1983, Dooley and Skinner, 1977). Lecturers can use case studies in many different ways and they can use their own views and interpretation of strategic management to shape the use of case studies. The impact of lecturers' styles as well as the expectations, backgrounds and abilities of students also influence how actual cases will be used and the extent that they meet desired ends.

Christensen (1987), Dooley and Skinner (1977), Osigweh (1989), Romm and Mahler (1991) examined how the case method enables lecturers to enjoy enormous scope in determining what objectives to link to the various cases that they select for class use. Thus, cases are used to: 1. acquire knowledge; 2. confront the complexities of specific situations; 3. develop analysis and synthesis; 4. relate theory to practice; 5. transfer knowledge and techniques from classroom to the organisation setting; 6. develop interpersonal skills, communication and listening; 7. gain illustration of particular issues and managerial principles; 8. develop self-analysis, attitudes, confidence, and responsibility; 9. develop judgement and wisdom; 10. enliven teaching; 11. gain the student's intellectual and emotional involvement; 12. bring realism into structural settings.

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THE RESEARCH DESIGN

This study attempts to explore the use of cases by lecturers in their teaching of strategic management in Hong Kong universities. The study identifies lecturers' objectives in using cases in their teaching, the effectiveness of using cases in accomplishing those objectives and problems in using cases generally. Forty-eight lecturers who have taught strategic management in six Hong Kong universities were identified through direct enquiry and crosschecking through the web page of each university. Forty-eight copies of questionnaire were sent out. Telephone calls were used to follow up on the initial contact. Sixteen questionnaires were returned (a response rate of 33 per cent). Fifteen responses were usable.

LECTURERS' OBJECTIVES IN USING CASES

Open-ended questions were used and the respondents were asked to state their main objectives in using cases as part of the teaching method. Each of the respondents listed a number of objectives and the combined objectives totaled 89. They were grouped into six sets of objectives: strategic analysis/strategic thinking; illustrative; pedagogic expedience; communication and interpersonal skills;

integrative; and information skills (Table 1).

The most frequently cited objective was strategic analysis/strategic thinking and accounted for more than one third of all responses (41% for undergraduate and 37% for postgraduate). This response was cited by 14 out of 15 undergraduate lecturers (93%) and 7 out of 11 of postgraduate lecturers (64%). The second most frequently cited objective is illustrative and pedagogic expedience respectively. Their use accounted for 15 percent responses from undergraduate lecturers and 20 percent of responses from postgraduate lecturers. Table 1 shows the frequency each objective was cited. However, in Jennings' UK findings (1996), the most frequently cited objective is illustrative (34%) whereas strategic analysis/strategic thinking (18%) is the second most cited objective, followed by pedagogic expedience (16%).

To indicate the importance of each objective, respondents were asked to rank their objectives. The order of importance for the undergraduate category is: strategic analysis/strategic thinking (mean score of 1.86); pedagogic expedience (mean score of 2.0); illustrative (mean score of 2.63); integrative (mean score of 2.71); communication and interpersonal skills (mean score of 2.71); and information skills (mean score of 3.5).

TABLE 1
CASE STUDY OBJECTIVES

OBJECTIVES	EXPRESSED	AS A PROPORTION OF ALL OBJECTIVES CITED		
		N	% HK	% UK
1. STRATEGIC ANALYSIS/STRATEGIC THINKING		22	41% (Undergraduate)	18%
		13	37% (Postgraduate)	
2. ILLUSTRATIVE		8	15% (Undergraduate)	34%
		7	20% (Postgraduate)	
3. PEDAGOGIC EXPEDIENCE		8	15% (Undergraduate)	16%
		7	20% (Postgraduate)	
4. COMMUNICATION AND INTERPERSONAL SKILLS		7	13% (Undergraduate)	15%
		5	14% (Postgraduate)	
5. INTEGRATIVE		7	13% (Undergraduate)	12%
		3	9% (Postgraduate)	
6. INFORMATION SKILLS		2	4% (Undergraduate)	4%
		0	0% (Postgraduate)	

The postgraduate lecturers ranked the importance of different objectives as follows: illustrative (mean score of 1.57); integrative (mean score of 1.67); strategic analysis/strategic thinking (mean score of 2.31); pedagogic expedience (mean score of 2.57); and communication and interpersonal skills (mean score of 3.21). With reference to the UK results, the order of importance was: strategic analysis/strategic thinking; illustrative; integrative; communication and interpersonal skills; and pedagogic

expedience. However at the postgraduate level, Hong Kong lecturers see illustration as the most important objective.

EFFECTIVENESS AND PROBLEMS

The study assessed effectiveness in two ways. The lecturers' own evaluation of their success in attracting the participation of students and their ratings for the achievement of objectives. The case study method is generally regarded as a participative form of

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teaching/learning and requires students to involve in extensive preparation and classroom discussion. Taking into account the whole exercise of case studies (analysis, presentation, and discussion), respondents were asked to rate student participation on a five point scale from 1=excellent to 5=poor. The results for undergraduate and postgraduate students' participation are summarized as below:

Undergraduate participation:

Six (43%) respondents gave 2 and another six (43%) circled 3. Two (14%) gave 4, which is below the average score.

Postgraduate participation:

Four (40%) respondents checked 1 and another four (40%) gave 2. Two (20%) circled 3. In general, the results here appear to be associated with high student participation and are similar to the findings in UK (Jennings, 1996).

To explore the success of the case method in achieving particular objectives, lecturers were asked to use a five point rating scale to evaluate the performance of their

students (Table 2). The results in Hong Kong tend to suggest that cases serve a significant objective, i.e. it is used by 10 undergraduate lecturers and 11 graduate lecturers to get students to perform strategic analysis and to think strategically.

In terms of strategic analysis and strategic thinking alone, only fifty percent of lecturers for undergraduate courses rated the case method as effective for meeting the objective strategic analysis and strategic thinking but seventy-seven percent of lecturers for postgraduate courses rated the case method as effective for the same objective. This compares with 57% for the UK study.

The development of communication and interpersonal skills in Jennings' study of 1996 was highly successful while strategic analysis/strategic thinking was considered the least successful when cases were used. The experience in Hong Kong shows that cases are most effective for information, followed by illustrative at the undergraduate level. At the graduate level, cases are most effective for integrative purposes, followed by illustration and communication.

**TABLE 2
PERFORMANCE IN ACHIEVING OBJECTIVES**

OBJECTIVE	UNDERGRADUATE RATING		POSTGRADUATE RATING		
	N (%)	HK	N (%)	HK	(%) UK
1. STRATEGIC ANALYSIS/STRATEGIC THINKING	11	(50%)	10	(77%)	57%
2. ILLUSTRATIVE	5	(63%)	6	(86%)	62%
3. COMMUNICATION AND INTERPERSONAL SKILLS	4	(38%)	3	(86%)	91%
4. PEDAGOGIC EXPEDIENCE	3	(57%)	6	(60%)	67%
5. INTEGRATIVE	2	(29%)	3	(100%)	71%
6. INFORMATION	2	(100%)	0	(0 %)	--

Each objective was rated on a 5-point scale "Excellent" (1) to "Poor" (5). The percentage rating is calculated as follows:

a) for each objective; b) total the number of times the objective, which receives a rating of 1 or 2; c) express that number as a percentage of total number of ratings available for that objective.

As expected, undergraduates clearly have difficulty with analysis and dealing with complexity. Postgraduate level students appear to be strong in integrative ability and are able to add to the experience of organizations. They also communicate well and display sound analytical thinking. By and large the use of cases is less effective in achieving 5 of the 6 objectives with undergraduate students when compared with graduates. Agewise and experiencewise, graduates are more mature and seem in a better position to benefit from the case method.

To provide insight into the limitations of the case method, respondents were asked to identify the main problems, obstacles and difficulties that they encountered in using cases in their teaching of strategic management. Four main issues emerged (Table 3 available upon request):

1. Demands on Student's Time (N= 9; 45%) - The case may provide too much information for the time available. Students may not fully read the case.
2. Scope for Analysis (N=1; 5%) - The case may encourage a particular or narrow solution. Many cases do not have enough information on industry background to make "context" useful.
3. Resources (N=5; 25%) - There is no time for case writing. A high level of staff commitment is needed when using case to teach.
4. Relevance (N=5; 25%) - A lack of local cases that can provide an Asian perspective. The company used in the case may be unknown to the lecturer and students. It can be difficult for the lecturer to understand the case material (e.g. too technical). It can be difficult to judge if a case will work.

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Case material can go out of date easily. There is also difficulty with cultural differences. It can also be questioned whether the case is realistic or simply a projection of another author's own perceptual view. These dilemmas focus on the availability and quality of the case material itself rather than the operation of the case method. The lack of a particular scope of analysis, insufficient information and time, the encouragement of a particular or narrow solution, and the lack of local cases are problems that hinder the achievement of objectives in undergraduate performance. The biggest success of case usage for undergraduates is information (100%). As for postgraduate performance, pedagogic expedience is the only item that falls below 70 percent (Table 2).

Overall, the problems indicate that cases often fall short of the particular requirements of the course on which they are used and may not provide the user with helpful context material. From the survey, usage by individual lecturers ranges from three to twenty cases. It is most common to use between ten to twelve cases a year.

OTHER LEARNING METHODS

Eldredge and Galloway (1983) referred to a number of methods (case, texts, management games, field projects, video and guest speakers) typically used to help students learn strategic management. A similar pattern can be located here. The other learning methods employed by lecturers in Hong Kong are listed in table 4 (available upon request) with evaluation of each method to indicate its strengths and weaknesses.

The various methods have significant strengths and weaknesses and complement each other. Teach and Govahi (1993) indicated that various teaching methods, experiential exercises, simulations, the case method and lectures, develop different skills. A mix of teaching methods has been used in Hong Kong to develop a wide range of skills and to add interest to the learning environment.

CONCLUSION

The current study confirms that the case method is frequently employed in teaching strategic management. All of the respondents used the case method and between ten to twelve cases would be used. This research study confirms the role and effectiveness of case studies in teaching. The most important objective in the teaching of strategic management is to develop integrative skills in postgraduate learning and information skills in undergraduate learning. In general, the rating on the effectiveness of the case method at the undergraduate level seems to be low on integration; communication; strategic analysis; pedagogic expedience; and illustration whereas the rating on the postgraduate level is above average for integration; illustration; communication and interpersonal skills; and

strategic analysis (Table 2). This is somewhat different from another study on undergraduate students' view on case method by Chang, Lee, and Ng in 1999, which indicates that the case method appears to be a highly suitable tool for the development of strategic analysis/strategic thinking, communication and interpersonal skills. According to students the development of analytical skills, teamwork, and report writing ability comes from having to deal with the complexity of the case and the subsequent demand on them to justify the recommendations they make. It appears that students found cases more effective than their lecturers.

Cases continue to play a major role in the teaching of the subject of strategic management. The current study agrees with Reynolds (1978) and Jennings (1996) that lecturers should know what objectives they want to achieve in their classes whether undergraduate or postgraduate. Cases that are most appropriate and tend to be successful could be used more than once as they are difficult to come by. Lecturers use other learning methods such as business games, company based projects and guest speakers to add interest and to enable students to gain from meeting other specific demands associated with the different methods.

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