

## **GEORGIA STATE UNIVERSITY FACULTY DEVELOPMENT PROGRAM 2015**

### **CASE ANALYSIS WORKSHOP HANDOUT**

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#### **Why Teach Through Cases?**

Case analysis provides a fruitful learning opportunity in a classroom setting because it helps students apply the content material they learn in class in an engaging and fun manner. Actively engaging students in learning through (1) applying analytical thinking to a problem situation; (2) using supporting information and resources to develop actionable, results-oriented insights; and (3) learning to weave concepts and theory (what is explored in class) into practice (a real business problem situation) produces enhanced learning outcomes. Thus, case analysis helps the instructor more effectively impart knowledge, develop creativity, and assure better absorption of conceptual knowledge discussed in class. It helps students develop not only analysis, but more importantly synthesizing skills that are so vital in executive management.

Case teaching provides many learning advantages, including the following: (1) since the learning tends to be reality-anchored, students tend to remember what they learned through the case later in their careers (many of my students say this to me when I run into them at alumni events); (2) since the learning is learner-based, what the learner learns (from the analysis and class discussion of the case) becomes dominant in her learning experience; and following from these, (3) since the learner constructs her own interpretation of the reality in the case (often in conjunction with fellow learners), the learning that occurs is to a large extent learner-constructed (thus it stays with her longer, it is sustainable learning). As a writer of cases earlier in my career, I believe strongly in the value that case teaching provides to student *lifelong* learning.

Case analyses can be especially rewarding when completed in groups since students learn to work in an intellectually stimulating and challenging collaborative environment. From this perspective, case analysis is akin to experiments completed by students, typically in groups, in laboratory settings in the natural sciences, such as engineering and chemistry, and to themes explored in novels in the humanities (*Lord of the Flies*). As compared to other tools of teaching, a good case analysis does the following to enhance the marginal value contributed to teaching: (a) it fortifies course material discussed in class; (b) helps extend that material through visualization, such as through charts, figures, graphs, and videos prepared and presented in class by the instructor in a sequential manner; and (c) helps students synthesize knowledge and retain that knowledge for longer periods, especially if the instructor dedicates an hour or more to the discussion of a case, with return visits to it in discussion of future cases.

## **What is and what is Not Important in Case Analysis?**

All cases are written to achieve certain teaching objectives. For best results, the instructor may use cases that introduce a new concept in the course, underscore a concept already discussed in class, or integrate the concepts surrounding a topic into a comprehensive whole (it is best if one case can do these simultaneously). Thus, it is important to view the case scenario holistically, from the perspective of an advisor proposing solutions to the decision-maker, or a consulting physician providing an analysis of a medical problem to a group of other physicians. It is, therefore, important to know the case situation fully in arriving at the proposed comprehensive evaluation. This often involves not only analysis, but more importantly synthesis, of the concepts involved in the case; it is this *synthesis* that drives the advisor to her holistic view of the case.

Just like in the law or in medicine, there are no *right* answers or right treatments in any case analysis. What are important are the students' study, analysis, synthesis, and evaluation of the business scenario in the business situation so that they can, through collaboration with others, arrive at meaningful and relevant solution options. While group members will naturally disagree about their interpretation of the facts in the case, or their proposed approaches to synthesis and evaluation, and/or their suggested solution alternatives, this creative conflict will lead to cross-cultivation (or cross-fertilization) of ideas. Thus, it is important to form groups that are as diverse as is possible, whenever possible.

Since cases are written to support discussion of given topics in the course (say, internationalization of the firm; market segmentation in international markets; international branding and product rollouts), what is important is that the case truly speaks to the managerial complexities in the topic, gives students the opportunity to question the problem situation in the case, helps them creatively generate solution alternatives to the problem, and allow for creative presentation of findings. Timing of the case is not as central to its analysis as are the teaching and learning objectives that are embedded in the case. As in the natural sciences, fundamental problems that occur in business settings are typically time-independent. Students may gather data about the case through their own research, eg, through the internet to update demographic data on the firm, but this information should not be *the* foundation to their solution of the case (HBR cases typically provide all, or most, of the information needed to "solve" the case). Further, the case is designed to explore and underscore a particular managerial scenario at a certain point in time, and what may have happened since then is generally largely irrelevant to that scenario.

Instructors should organize their case portfolio to assure a logical sequence of the cases discussed and to ensure that the cases build on each other as students accumulate knowledge in the course. This will allow students' to answer two questions: (1) why are we studying this case in this class and (2) why are we studying this case at this point in this class? Answering these questions rationally will help underscore the logical flow of the course material in students' minds. For example, I use a case following my teaching of each of the 6 modules that compose my international business course. I begin with a case focusing on the internationalization

pathways followed by internationalizing firms from two different cultural backgrounds and corporate cultures to accentuate class discussion on globalization and the internationalization of the firm, the first module in my course. I follow this with a case that underscores the changing landscape in a globalizing industry and the globalization experiences of a member of that industry; this nicely helps students develop a feel for the importance of environmental and institutional developments in the firm's internationalization process, the second module in my course. After supporting modules on global market opportunity assessment, strategy and structure, and ownership with their case counterparts, I finish with a discussion of a case focusing on branding by an American marketer of a product developed in its Japanese subsidiary prepared to be marketed in the Western European market. This case provides the opportunity to paint a bird's eye view picture of the entire (but concentrating on the latter half) of my course.

### **How Should Students “Work” the Case? What is a “Winning” Case Report?**

The most important ingredient in effective case analysis is **not** to follow a *strict* pattern or template of analysis, such as the typically recommended: issues; situation analysis (often with Swot analysis); alternatives; recommended alternative; and solution and conclusions. While it is important to guide class discussion so that there is an effective flow to that discussion, it is more important not to *straightjacket* students into thinking in a patterned manner, to allow them to think creatively and recommend well-thought-through solution options that provide a “why not?” perspective on the problem. It is also important to challenge students with counter-intuitive arguments about what and what not management should do in a given situation; what *tradeoffs* may be involved when management engages in one alternative course of action vs another; and how the firm ought to ultimately address the problem it is facing with a longer-term perspective and in light of its many constraints, ie, lack of resources, capabilities, courage, etc. Thus, what is important should be *telling* a well-crafted story, rather than telling the ending of the story well.

I prefer written case reports to be typically 12-15 page essays. I expect these analyses to address the particular problems around which the case scenario revolves; approaches to resolving these problems; the best (or better two) pathways to resolving these issues; and a summary of recommendations. In essence, the report should include a *diagnosis*, discussion of the *prognosis* (as viewed by the case team), and an expression of *treatment*. Since there is no clear cut best solution that I look for, I evaluate the students' rationale, the breadth and depth of supporting arguments they put forward to underscore their suggestions, and the depth of the course literature they use, eg, readings from the course readings list, in supporting their recommendations. The quality of their writing is important: their narrative should flow nicely and be carefully edited before it is submitted to me. When possible, students' should support their rationale with quantitative analysis; these may include charts, graphs, or numerical analysis (such as B/E analysis where applicable), without repeating the exhibits attached to the case.

To help students better understand my expectations in these reports, I provide a template on how I will evaluate their reports. I use the following criteria in my evaluation: comprehensiveness in

the discussion of the issues embedded in the case (persuasiveness of the arguments presented for this, 20 points); comprehensiveness in alternative solution perspectives discussed on the problem (30 points); comprehensiveness of the logic presented to ‘make the case’ for the preferred solution alternative (30 points); and creativity or uniqueness in the solution alternative presented (20 points). I do this because I believe that students need to know where they are doing well and how they can improve.

Most important, of course, is student engagement in the in-class case discussion. The best way to do this is through the use of the Socratic Method, just like as used in a court of law, but it is important to do this warmly not to intimidate the student. The key ingredient in this context is to challenge the students with *what if* and *why not* questions to expand their thinking on the problem they are addressing in the case.

### **Summary**

Case analysis can be a fun and rewarding experience for both teachers and students. Its merit is in fostering enhanced learning outcomes that are sustainable. By learning new concepts, underscoring concepts already learned in this and in other classes, and integrating these into comprehensive wholes, students develop synthesizing skills and gain confidence in their thinking patterns and solution alternatives. They grow into the kaleidoscope-thinking managers we all wish they will become. If we can foster achieving this noble outcome, we will have served our purpose as dedicated educators. Enjoy your case teaching!