

Case Method of Learning in Management

Independent Thinking and Development of Problem-Solving Skill with a Real Situation

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Abstract

The case method is a learning technique in which a real or frictional situation or series of events is presented to students for their analysis and consideration of possible solution of problem identified. Their findings in a real situation can be compared subsequently with what occurred. A case study is a written description of a problem or situation. Unlike other forms of stories and narrations, a case study does not include analysis or conclusion but only the facts of a story arranged in a chronological sequence. The purpose of a case study is to place learner in the role of decision-makers, asking him to distinguish pertinent from peripheral facts, to identify central alternatives among several issues competing for attention, and to formulate strategies and policy recommendations. The method provides an opportunity to sharpen problem-solving skills and to improve ability to think and reason rigorously.

Key Words: Case Analysis, Case Studies, Learning Style, Problem-Solving, Role Play.

Introduction

The case method was first developed by Christopher Longdell at the Harvard Law School to help students to learn for themselves by independent thinking and to develop skills in using their knowledge. The case method is a learning style and classic approach to a problem which is widely used in management institutions for a long time. **Dean Gay** said that the purpose of business education was to give each individual student a practical and professional training suitable to the particular business he plans to enter. Thus, case method is an approach to learning that links the classroom to realities of business and engage the students in a practice-oriented, problem-solving instructional mode. The case method is a philosophy of professional education that converts knowledge into action. It is reordering of learning experience. **Dewing (1931)** stated the essence of case method in these words: "It asks not how a man be trained to know, but how a man be trained to act." **Harriet O. Ronken** writes, "One great advantage of the case method is that it is not primarily focused on what the student knows. In human relations, it is primarily concerned with creating an atmosphere and a set of relations in which the student can rethink their experience so as to

derive more effective meanings from it and begin to make more precise discriminations in their relations with others.”

What is a Case?

A 'Case' is a problem. It is the description of a situation that has actually been faced by a businessman and it requires his analysis and decision. An attempt is made to draw conclusions, principles or generalizations from it, it is a learning experience through the process of problem-solving and decision-making.

Gragg writes, "A case typically is a record of a business issue which actually has been faced by business executives together with surrounding facts, opinions and prejudices upon which executive decisions have to depend. These real and particularized cases are presented to students for considered analyses, open discussion as to type of action which should be taken.”

Chirstensen defined a case as "A partial, historical clinical study of a situation which has confronted a practising administrator or managerial group. Presented in narrative form. to encourage student involvement, it provides data substantive and process essential to analysis of a specific situation, for the framing of alternative action programmes, and for their implementation recognizing the complexity and ambiguity of the practical world.”

Characteristics of Case

- Case is a description of a situation involving problems to be solved.
- The case may not have as complete information about the problem as the reader wishes.
- It provides an opportunity to learn and to separate the wheat from the chaff.
- It is a problem situation involving many events occurring around it in a definite chronological sequence. Events are the facts of the case generally mingled with each other making problem situation more difficult.
- It may be programmed or non-programmed. It may be routine, repetitive or may be new, unique and marvel.
- It may be problematic, descriptive and illustrative.

A good case places students in a realistic situation where they can practise making decisions without the accountability for making mistakes which the real world imposes. The case method is an approach to learning by doing. This method should expose the students to

as many aspects of business activity as possible. The student's role is the collection and analysis of facts thus developing decision- making skills.

Objectives, Importance and Merits of Case Method

Case method is more than just pooling of experience, it is an exercise of cooperative and creative thinking. Discussion of case can provide an additional insight into an issue. It helps in finding out new and better solution. It is a 'Thinking method' of learning. In fact, it is a process of drawing out of the student's mind: it is not pouring in the instructor's ideas. It requires active rather than a passive role. The instructor does not tell you; he expects the students to study the case and tell him. "Because wisdom can't be told. It has to be experienced and discovered on one's own and through others" (Gragg).

The focus of the case method is on skills, knowledge and attitude of the learner. It puts emphasis on 'application to concept' rather than 'concept to application. This method emphasizes learning in both the left and right hemispheres of the brain. It emphasizes the live process of knowledge creation. In other words, it emphasizes on conceptualisation through observation, experience, and experimentation. It can be regarded as a type of 'model. It describes simplified version of the real thing. It presents the student with a 'mini-reality', in which students examine and analyse, and eventually suggest a solution and make a decision based on that solution.

Case analysis can help anyone to make progress in learning how to live both actively and productively with others. It can stimulate curiosity and the capacity to ask productive questions. To the extent that case analysis proves rewarding, it can also strengthen the will to maintain an experimental attitude towards firsthand experience. Case method basically aims at developing decision making skill and analytical abilities. It also helps in providing informal training in communication skill which is required to establish proper and effective interpersonal relations with subordinates, peers and superiors. It develops and enhances confidence among the managers for solving problems effectively.

The managers learn how to handle and use data and information available on various aspects of problem for solving it. It broadens the horizons of knowledge of the managers by getting them exposed to wide ranging situations made of separate sets of variables. It describes the real business situations as to acquaint the students with the principles and practices obtained and involved in various work settings. It introduces realism into formal instructions by matching their theoretical knowledge and its relevance in practical situations. It demonstrates various types of goals, problems, facts, conditions, conflicts and personalities

involved in organisational settings. It helps students to acquire the skills of putting textbook knowledge about management into practice.

Steps in Case Analysis

Although there is no single method suitable to analyse all the cases in all situations, however, using an organised seven-steps approach in analysing a case will make the entire process easier and can increase learning benefits:

- I. **Read the case thoroughly:** To understand fully what is happening in a case, it is necessary to read the case carefully and thoroughly. You may want to read the case rather quickly the first time to get an overview of the industry, the company, the people and the situation. Read the case again more slowly, making notes as you go.
- II. **Define the central issue:** Many cases will involve several issues or problems. Identify the most important problems and separate them from the more trivial issues. After identifying what appears to be a major underlying issue, examine related problems in the functional areas (for example, marketing, finance, personnel and so on). Functional area problems may help you to identify deep-rooted problems that are the responsibility of top management.
- III. **Define the firm's goals:** Inconsistencies between a firm's goals and its performance may further highlight the problems discovered in step 2. The identification of the firm's goals will provide a guide for the remaining analysis.
- IV. **Identify the constraints to the problem:** The constraints may limit the solutions available to the firm. Typical constraints include limited finances, lack of additional production capacity, personnel limitations, strong competitors, relationships with suppliers and customers and so on. Constraints have to be considered when suggesting a solution.
- V. **Identify all the relevant alternatives:** The list should have all the relevant alternatives that could solve the problem(s) that were identified in step 2. Use your creativity in coming up with alternative solutions. Even when solutions are suggested in the case, you may be able to suggest better solutions.
- VI. **Select the best alternate:** Evaluate each alternative in the light of the available information. If you have carefully implemented the above five steps, a good solution to the case should be apparent. Resist the temptation to jump to this step early in the case analysis. You will probably miss important facts,

misunderstand the problem, or skip what may be the best alternative solution. You will also need to explain the logic you used to choose one alternative and reject the others.

- VII. **Develop an Implementation plan:** The final step in the analysis is to develop a plan for effective implementation of your decision. Lack of an implementation plan even for a very good decision can lead to disaster for a firm and for you.

Case Study and Role Play are Distinct

The distinction between a case study and role play is as follows:

1. A case study presents a problem for discussion whereas, role play places a problem in a life-like setting.
2. The problem in a case study is derived from previous events and the problem in role play involves ongoing processes.
3. The problem in a case study involves others. But the problem in role play involves the participants themselves.
4. A case study emphasizes the fact, but role play emphasizes the feelings.
5. A case study is an intellectual exercise, whereas role play is emotional involvement.
6. A case study defines action in the exercise of judgement, whereas, role play provides for execution of action.

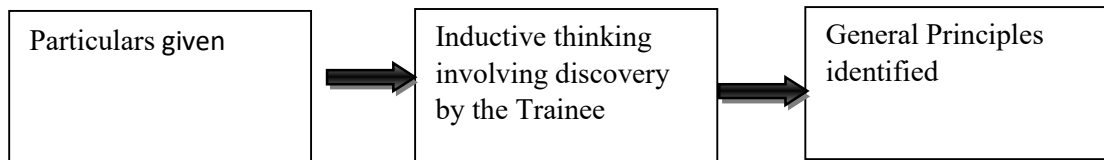
Types of Case Studies

Case studies can be divided into two broad types:

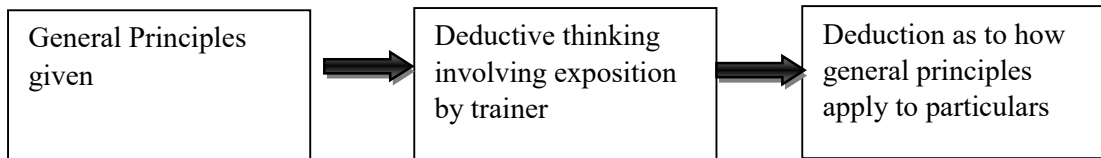
- (1) **Inductive Case Study:** In such studies, the particulars (details) of a case are given and by inductive thinking (working from particulars to principles) the trainees work out the theory, or general principles. Inductive case studies are based on enquiry or discovery training methods.
- (2) **Deductive Case Study:** Deductive case studies reverse this order. The trainees are given the general principles, laws or norms, then by thinking deductively, they deduce how these theoretical principles apply to the scenario particulars presented by the case study

These studies are shown in the following Figures:

Inductive Case Study



Deductive Case Study



Continuous Learning through Case Studies

The case development or its teaching in the classroom for any teacher is a continuous process and is a learning experience. One masters the art of writing good cases or their discussion over time. It is always better to develop or discuss the case in one's own style instead of emulating or blindly following the style of others. Although a lot of workshops are conducted these days on writing/discussion of cases in B-schools, still more efforts are required in teachers' training. Leading B-schools like IIMs and University Department/Schools, who are using this technique effectively can play an important role in this area. Already IIM-Ahmadabad has developed a depository of good cases in different branches of management and are available for use by the faculty/students of other B-schools in the country. Although case method of teaching should not be used casually, the review of the available cases and the general feedback on how the cases are discussed in the classes suggest that case development and discussion have become more of a fashion than a serious exercise in most of the B- schools. Case method requires a lot of planning and preparation by both teachers and students before its discussion in the class.

Faculty and students both being co-creators in this learning process must be actively involved.

In this context, few things if taken care of by the faculty shall enhance the learning and effectiveness of case method of teaching. They are as under:

- (i) The objectives to be achieved through case discussion should be clearly spelt out. Faculty must have in mind, the issues, dilemmas and principles to be covered through case discussion. It is better if a case focuses on a particular

issue/problem so as to enable the students to apply their class room learning to solve it.

- (ii) Faculty should have their own case preparation in terms of knowledge of issues/problems involved, anticipation of issues to be raised by the students, providing sources of studies and necessary data to students to enable them to form an opinion on the same.
- (iii) Sufficient time should be given to students to think about the case, identify the issue(s) involved, prepare brief notes based on facts and data available for logical conclusion and develop one's perspective about the problem and a possible solution. This will facilitate active participation of students in case discussion.
- (iv) Faculty should create a conducive environment during the case discussion in which everyone should feel motivated to participate and presents one's perspective of the problem and its possible solution. Faculty as a moderator during the case discussion should provide additional information, clarifications and academic inputs for better discussion and realisation of the objectives of case discussion.

Conclusion

The case method of teaching over a period of time has evolved itself as a useful pedagogy in management education having immense potential to enhance the important skills of decision making, leadership and communication required for successful conduct of business in today's interconnected economies. By focussing on increasing the class room diversity, better preparedness of teachers on different issues related with case discussion and shifting the onus of learning through case discussion on students by way of doing some research, collecting additional data and preparing brief notes for active participation, the effectiveness of case method of teaching can be duly enhanced. One has to understand that it is a serious exercise and requires sincere efforts and a lot of involvement on part of both faculty and students to achieve its intended objectives.

To conclude, the case method has large educational value as it helps the students to develop necessary skills for decision making in actual business situation. However, it should not be regarded as a substitute of other methods of teaching. In order to obtain the maximum value from the case method, students first understand the basic principles of the particular subject and then they are asked to analyse the case. The undermentioned suggestions are recommended:

- ✓ **Case reports should be true to life:** Studying cases cannot help anyone learn unless the case reports faithfully picture actual situations. An entirely fictitious case is worthless.
- ✓ **Prepared problem cases are relatively unhelpful:** The prepared problem case does too much for students and asks too little of them. It does not prepare a student for the kind of analytical thinking required by real life.
- ✓ **Students must be able to connect with a case:** A student cannot learn from a case until after he has connected with it. To get full value from a case report, a student must start by putting aside preconceptions, prejudices, and personal experiences which could obscure or distort his view of factual material in the case before him. He must have imagination and empathy.
- ✓ **There should be productive interaction and 'match between taking and standards set:** Paul Pigors and Myers write, "When shallow thinking, socially imperceptive behaviour, or destructive criticism is given free rein, members of a study group move away from the goals which they frequently recommend for those people in cases whose behaviour they are discussing. When the atmosphere and relationships in a study group are poles apart from what is needed for productive interaction between people, then talking and doing are too unrelated to be educational. Little can be gained by talking about cases in human relations unless the situation in which the talking is done matches- or at least reaches towards-standards set up for participants."

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