The Interactive, Progressive Case Study

David O. Egleston, Lawrence Technological University, Southfield, Michigan, USA

ABSTRACT

The case study method is one of the most common teaching tools used in business education. However, a number of limitations of this method reduce its effectiveness. The interactive, progressive case study addresses these limitations and improves learning outcomes for students. This paper introduces the technique as it was used in teaching organization development and explains how it could be used in a number of business disciplines.

Keywords: case study method, problem-based learning, plagiarism, learning outcomes

INTRODUCTION

The case study method of teaching is widely used in business education (Gragg, 1940). According to Gragg, the benefits of case studies stem from active participation with actual business problems. Hammond (2002) described case study learning as "the most relevant and practical way to learn managerial skills" (p. 1). According to Hammond, students improve analytical skills and develop experience and expertise in a variety of fields as they learn rules of thumb for decision making. However, there are significant limitations to the case study method. This paper introduces a technique, the interactive, progressive case study that addresses these limitations.

PREVIOUS RESEARCH

Case studies increase student learning in a variety of subjects including economics (Capon & Kuhn, 2004), engineering (Keefer & Ashley, 2001), marketing (Arts, Gijsethelers, & Segers, 2002), teacher training (Koehler, 2002), psychology (Mayo, 2002; Mayo, 2004) and forensic science (Nobitt, Vance, & DePoy Smith, 2010). Aaron, et al. (1998) used an experimental design to test whether students who learn using the case method retain information longer than students learning in a traditional lecture format. Students in the experimental group showed no change in performance on an exam one year after the end of class whereas students who studied in a pure lecture format performed significantly worse on the follow-up exam as compared to their performance at the end of the course. A meta-analysis by Albanese and Mitchell (1993) showed that students who learn in a problem-based approach (including case-based learning) found education more nurturing and enjoyable, performed as well as or better than students learning in "traditional instruction" and rated faculty more favorably on evaluations.

Problem-based learning (PBL) has proven an effective way to increase learning in students of all ages and those from different socioeconomic groups. Gordon, Rogers, Comfort, Gavula and McGee (2001) report that PBL improves learning outcomes for low-income urban minority students. Elementary pupils identified as gifted students, regular students and ESL students also benefit from PBL (Liu, 2004).

Although the advantages of case-based learning are documented, there are important limitations as well. Case studies typically present a student with a large amount of information and a set of questions designed to assess whether the student can glean the answers from the pages of the case. Although a case may well present a vast amount of data, it is still finite and available. The answers are there if only the student continues to dig. Students do not learn to ask appropriate questions; they learn to answer those asked by others. Students do not learn where to go to find answers to questions; they learn that the answers are in front of them. Such an experience does not prepare students to address the problems they will face upon acquiring positions in management.

Another limitation is posed by the fact that many commonly used cases have been compromised. McCardle (2010) searched the Internet for information related to older cases stating sites with a variety of information were readily available including "case write-ups, student presentations, instructor lecture slides, Excel spreadsheets, and blog posts discussing the case" (p. 77). I have found issues with cases in previous courses using plagiarism-detection software. Use of such software creates an expense for the institution, consumes faculty time and displays an inherent distrust of students.
A single innovation, the interactive, progressive case study, addresses all these limitations. Since the case is developed in real time over the course of the semester, there are no answers available for students to download. Once a case has been developed, the instructor can simply modify the case when reusing it to prevent it from becoming compromised. Students must design and submit questions to access data from the company rather than having the information spoon fed to them over several pages of a case. Students learn what questions to ask and to whom they should be directed. This more accurately reflects the way business information is collected and allows the students to learn the process of formulating appropriate questions in a safe environment, better preparing them for the jobs they will fill upon graduation.

A WORKING EXAMPLE

Recently, I used the interactive, progressive case study to teach organization development (OD). Students self-selected into teams of three to four and each team was assigned a case. Teams were told to approach the case as though they were outside OD consulting firms rather than inside OD practitioners. The initial case description consisted of a short narrative of an organization experiencing a challenge. The hypothetical company described what it believed to be the problem. Teams were told, as part of the course, that companies often believe they know the cause of their problem and many even suggest particular solutions when contracting with OD consultants. They were also told that power and politics within an organization can complicate the job of diagnosing and developing an organization and that they could expect this as part of the project.

The assignment consisted of a number of steps to be conducted over the course of the semester. Each team was instructed to conduct a minimum of three rounds of diagnostic activities to identify the actual problem(s) to be addressed. Once a team had identified the problem(s), it was to select an OD intervention and develop an implementation plan to present to top executives at the company. The plan was to include a timeline of major activities, a communication plan to introduce and advance the intervention, feedback mechanisms to monitor progress, an evaluation plan and a budget.

Diagnostic Activities

After covering the material related to diagnostic tools in class, I instructed the teams to develop their first set of diagnostic activities. Each team was required to submit to me a request for interviews and focus groups with key organizational personnel, observation of personnel and processes and tests and surveys to be administered to management and employees. The request included a list of questions to be asked, the purpose of any proposed observation (e.g., types of behaviors of interest), survey instruments and the names of tests to administer and to whom these activities were addressed. I responded to the diagnostics from the perspective of organizational members. Where specific questions were provided of an individual, a specific answer was given. For focus groups and surveys, responses were provided in aggregate form. For observations, a list of behaviors with their frequency was provided. I delivered the requested data to each team along with my comments relating to improving the content of subsequent diagnostic activities. I hoped for, and was not disappointed to see, many opportunities for improvement in the diagnostics from round one. Detailed written comments were provided for each team and specific teachable points were shared with the class without reference to a particular team so that all students could benefit from the experience of every team. Rounds two and three of diagnostics were conducted in much the same way as round one. However, I noticed the quality of proposed diagnostic activities improved considerably from round one to round two and somewhat from round two to round three.

One team completely missed the mark with the first round of diagnostics. All members of the team visited with me during office hours for advice on how to improve their diagnostics in round two. I was able to reiterate material from the textbook and from personal experience regarding diagnostic techniques. During this meeting, I determined that team members were acting as a group rather than a team and suggested techniques to improve coordination and teamwork. The team’s performance improved considerably in subsequent diagnostic rounds.

Intervention Design

Upon completion of diagnostics, teams were required to present their proposals to company executives. Each team made a presentation to the class detailing the issues they discovered in the organization and the plan to address those issues. Teams were encouraged to visit with me during office hours in the stages of intervention design. This gave me more opportunity to share the lessons learned from my own consulting experience with the students. As a result,
the quality of the interventions was superior to that I typically see in an undergraduate course. Finally, teams were required to present their intervention to the class and answer questions.

**Student Responses**

Initially, students expressed their dislike of the unstructured format of the assignment. After I explained the rationale for the project, they accepted the assignment and went about attempting to meet my expectations. As a result of my close cooperation with the teams over the course of the semester, the teams grew to enjoy the assignment. Several students wrote on the final course evaluation they had learned a great deal from the team assignment and found it both challenging and fun.

**APPLICATIONS**

This technique could be used to teach most business disciplines. In a marketing course, the instructor could require students to develop a marketing campaign for a product. Students would begin by brainstorming marketing ideas and follow up by pilot testing those ideas with a focus group. The focus group could be simulated by simply asking students to prepare the list of questions or students could hold actual focus groups with members of another team playing the part of participants. Once a marketing strategy had been selected, students would continue by developing the actual marketing materials such as advertising copy or commercial storyboards.

In a human resource management (HR) course, students could be asked to design an HR intervention such as a compensation plan. Students would begin by conducting a job analysis. With appropriate information about the compensable factors of the job, students could next research compensation at competing firms and design a total compensation package.

Students in a finance course could be assigned to finance a new capital project. They would need to identify the costs of the project, its expected life-span, the firm’s cost of capital and availability of funds from various sources. Based on this information, students would develop a plan to finance the project and report to senior management.

**DISCUSSION**

This technique did create additional demands on my time as an instructor. Students came to visit with me on many occasions during office hours and I spent a number of hours responding to teams, particularly in the diagnostic phases of the assignment. However, after seeing the depth of understanding students gained with the process, it is time I consider well spent and I shall use the technique in future classes.

As the semester progressed, I found the technique to be more and more enjoyable. It gave me the opportunity to work closely with teams of students and to help them develop skills they would not otherwise have developed. I provided lessons learned from my own days as a consultant, built teamwork and problem-solving skills in the teams and helped students learn to ask the right questions when analyzing a company and developing an OD intervention. Students were able to make novice mistakes in an environment where there is little risk. As a result, they will be better prepared to accept this type of assignment when they face it in the real world. They will have confidence they know what questions to ask, to whom they should be addressed and what to do with the information they learn.

Initially, my primary reason for using this technique was to prevent cheating. What I learned in the process is that students learn more, and enjoy learning more, when they are actively involved in the process.

**REFERENCES**


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