Designing and Delivering a Case Method Course
Session Objectives

- Understand characteristics of effective case method teaching
- Identify special opportunities and tasks
- Learn how to successfully plan a case-dependent course
- Develop “Game plan” for case discussions
- Review common pitfalls
SOME CHARACTERISTICS OF EFFECTIVE CASE METHOD TEACHING
Outcomes

- In-class learning substantially exceeds pre-class learning

- Learning extends beyond the individual class

- Students are engaged, energized and challenged by class discussions

- Students discover, articulate and develop most critical insights, with the instructor’s help

- Students participate in applications of theoretical models, frameworks and concepts to actual business situations
Pre-Conditions

- Mutual respect between instructor and students, and between students
- Instructor and students come to class on time and are very well-prepared
- Instructor and students apply rigorous standards and are willing to take risks and consider alternative viewpoints
- The case, supporting materials, assignment questions, and teaching plan are well designed and are part of an integrated course
Roles and Responsibilities

Instructor:

- Prepares both content and process
- Listens thoughtfully throughout discussion
- Manages class flow and structure
- Responds flexibly to student comments
- Poses challenging questions, employs cold/warm calls, and follow-ups to promote high quality class discussion
- Facilitates students ‘discovery’ of the case learnings
- Provides appropriate closure to discussion segments, class sessions, and course modules
Roles and Responsibilities

Students:

• Prepare the cases thoroughly for class discussion

• Participate and listen actively throughout class

• Contribute ideas, analysis, synthesis and personal experiences (instead of simply presenting case facts)

• Build on each other’s comments and critique and debate different viewpoints

• Consider it a ‘fitness gym’ rather than a ‘tanning salon’ for learning
SPECIAL OPPORTUNITIES AND TASKS
Special Opportunities

- Plan to use professional experience of Haas students to elucidate learning from each case.
  - Get to know Haas students by checking their professional profiles to design your calling pattern
  - Encourage students to share their knowledge, experiences, and perspectives
  - Encourage alternative points of view - devil’s advocates add to the richness of the discussion and learnings
  - Trigger those not contributing to class discussion using cold and warm calls
  - Be engaged and enthusiastic to feed student enthusiasm and interaction among students

- Invite relevant case protagonists or guest speakers to share their experience, knowledge and perspectives.
Special Tasks

- Knitting together cases to form an integrated course
- Managing Discussion Flow and Transitions between Pastures
- Accomplishing Learning Objectives
TIPS FOR PLANNING A CASE-DEPENDENT COURSE
Integrating Case-Dependent Courses

- Segment course into Modules and Key Topics to be covered in each module.

- Get a first cut on candidate cases
  - Haas: [cmr.berkeley.edu/berkeley_haas_cases.html](http://cmr.berkeley.edu/berkeley_haas_cases.html)

- Match candidate cases to Learning Objectives and Course Topics from your course plan.

- Whittle down case selection by analyzing the cases and reading the Teaching Notes if available.

- Check CTE case database website to ascertain if the cases have been used in other courses.

- Cull the whittled down cases to fit the case sessions planned.
  - Try to have cases covering a variety of products and industries.
  - Limit cases on industries that you are not comfortable with.
Tips

- Guide student preparation by including Discussion Questions and/or Key Topics in the syllabus.

- Contact relevant Guest Speakers early to book them.

- Plan some sessions for review, integrating concepts developed through cases and setting stage for remaining sessions.

- Develop a grading formula that includes class participation and written analyses of cases
  - In syllabus include class participation grading scale and template for evaluating written case analyses
Conducting case discussion

GAME PLAN
Preparation: Before Class

- **Review** your Learning Objectives for the class session, and your plan to extract these objectives from the case.

- Identify a range of **questions** to prompt and transition the discussion.

- Decide how **flexible** you are going to be during class in guiding the discussion.

- **Review your Board Plan and Calling Pattern**.
Preparation: Before Class

- Do your own exhaustive analysis of the case from multiple angles
  - Prepares you to tackle different discussion paths, analyses and recommendations

- Organize your thoughts on note sheets to access as needed during discussion
  - Allocate time for various discussion pastures
  - Plan where and how to use relevant company/industry expertise of students
Opening Moves

- Post Agenda on board showing roadmap of topics

- Select student to be Opener considering
  - Student background/experience
  - Course timing
  - Level of complexity of case
  - Other?

- Begin developing Board Plan in conjunction with opener’s comments as canvas for discussion
Middle Game

- Kindle discussion
  - Ask provocative questions
  - Play devil’s advocate
  - Cross question to elicit deeper thinking
  - Solicit input from a range of students
  - Acknowledge and highlight key comments
  - Move around the class. Avoid being glued to the board or laptop.

- Spark debate, sometimes moving behind students to make them debate with each another:
  - employ role play;
  - poll students on decisions and recommendations
Middle Game - continued

- Actively manage the discussion
  - Select *pivots* to steer discussion
  - Keep an eye on the clock to plan *transition points* to new pastures
  - Elucidate learning objectives with *leading questions*
  - *Tie-in* previously-made points to current comments
  - Build an *integrated canvas* on the board along with the discussion
  - *Spread the air-time*; avoid air-hogs.
  - Be flexible regarding directions discussion can take
  - Use a ‘*parking lot*’ for valid but tangential points raised
End Game

- Elicit **Takeaways and Learning** from participants and build on them with your own **wrap-up**; follow up on unresolved issues

- May discuss any **recent developments** depending on objectives

- Use Powerpoint slides to:
  - **Summarize** discussion and analysis
  - **Connect** case analysis to theory / frameworks
  - **Link** class discussion to previous classes; set stage for next class
  - **Draw attention to relevant research and articles** of related interest
After the class...

- Make notes for next time:
  - what went well
  - what could be improved
  - any new insights

- Think about additions / modifications for future sessions based on this class discussion

- Assign class participation grade for the class session while fresh
A CP grading scale

1 point: Has read the case and is somewhat aware of the issues

2 points: Has prepared the case thoroughly and dug deeper and grasped the main points and key issues in the case

3 points: By extensive preparation has analyzed the case fully and lucidly expounded analyses
- proffered cogent recommendations
- overall has contributed substantially to class learning

4 points: Through extensive preparation has been able to build frameworks and managerial learnings by linking case analyses and learnings from previous cases with the current case,
- contributed very substantially to class learning,
- steered class discussion to areas providing additional learning

5 points: Contributed extremely to class learning and taught me something about the case
PITFALLS TO AVOID
Common Pitfalls

- **Failing to trust** the class
  - Set contract early with the class
  - Don’t over-structure sessions

- Falling back into *lecture* mode, making it a ‘tanning salon’

- **Not having enough** material for class session

- Trying to do **too much** in a single session

- **Lacking enthusiasm:**
  - Speaking in a monotone
  - Not moving around in class
  - Calling on stale hands or airhogs
Common Pitfalls (contd)

- Not managing time and transitions well,
  - having a haphazard discussion

- Insufficient preparation
  - Not matching case complexity to level of students
  - Preparing the wrong case
  - Not having enough material for discussion

- Calling Patterns not thought out
Pivotal Session A: First Class

- Establish Learning Contract with students
- Lay out Course Objectives and Syllabus
- Explain Grading Scheme, including class participation grading scale
- Cover important deliverables and dates
- Emphasize importance of case preparation, class participation, and active listening to enhance learning
- Ask students to have name cards in front of them in every class, and to try and sit in the same seat
- Run through class protocol and other administrative details -- office hours, internet communication, class laptop policy etc.
Pivotal Session B: A Third to Middle of the Course

- Solicit student feedback on course dynamics

- Incorporate suggested modifications that you consider justified and possible and that can add value to class learning

- Provide cogent rationale for aspects that remain unchanged

- Check which students have had relatively less airtime
  - Plan to engage them in case discussions through cold calls and warm spotlights
  - Send emails encouraging them to participate in class; ask them to let you know ahead of time if they are exceptionally prepared for a case session
Pivotal Session C: Last Class

- Review key takeaways and learnings gleaned through each session over the course

- Prepare students for future learnings
  -- give references for future learning of subject matter
Parting Thoughts

- Elements of successful case method teaching are similar to those for any other method:
  - Trust your students!
  - Focus on student learning and learning objectives
  - Be prepared, engaged, and enthusiastic about the subject matter and the case situation
  - No one right method
  - First few sessions crucial to set tone
Parting Thoughts - continued

- Select interesting and educational material
- Share insights from practical experience and research
- Continuously update your case teaching notes
- It takes time and effort, but the payoff from using cases is high!
WAC grading

- Dimension 1: Depth of Analysis and Cogency of Recommendations
- Dimension 2: Content and Presentation
- Dimension 3: Quantitative and Conceptual analyses and understanding
WAC: Areas to assess

- Substantive work/effort
- Lucid managerial presentation, good flow of material
- Relevant numberwork to support analysis and recommendations, - use of key metrics
- Use of frameworks, templates, charts and exhibits to illustrate points, - amplify and support analysis and recommendations
- Extraction of key issues facing the company/protagonist, - prioritizing goals, - gleaning relevant information from case, - assessment of options available, - delineation of recommendations supported by cogent rationale, - stating key managerial learning/takeaways from the case
Learning Styles
Kolb (1984); Hay Group

Active Experimentation

Concretely Experience

Accommodator “The Do-er”

Reflective Observation

Converger “The Decision-Maker”

Abstract Conceptualization

Diverger “The Creator”

Assimilator “The Planner”