ABSTRACT

Marketing educators must adapt to a changing environment to maximize student learning. Given the nature of our students during the early part of the 21st century, great emphasis must be placed on interactive learning which requires students to be actively involved. The case method is an important part of the teaching mix in this regard. This paper provides some insights for marketing professors concerning use of the case method and is intended to facilitate productive and efficient teaching.

INTRODUCTION

Marketing professors like to talk about the concepts of dynamic environment, target marketing, matching the message to the audience, and adaptive selling, among others. There is considerable benefit from the application of these concepts to the persuasive challenges that we face in teaching. In the 1980’s, for example, good teachers recognized the impact that watching so much television had on student expectations in the classroom. During that era students came to expect a considerably more entertaining presentation style from professors than had earlier been expected of professors. Effective teachers must evolve to achieve success within a constantly changing environment.

Now as we deal with students in the early part of the 21st century, it is important to recognize that these students have been dramatically impacted by their video experience not only by watching a lot of television, but also by interacting as they play a wide variety of very popular video games. Indeed, some young people now come to college after having spent thousands of hours with a video game controller in their hands. In addition, it often seems that time spent there was a substitute rather than a supplement to time spent reading books, magazines, and newspapers.

Consequently, when current college students are asked at the end of a term what they like best about a course, their responses are predictable. Most often, they mention some activity in which they participated. Very rarely do they mention the lectures, the brilliance of the professor, the intellectual rigor of the required readings, or any other passive forms of learning. To achieve a more long-lasting learning impact among our current students, we need to get students more involved, more active, and more engaged in the professional areas in which we teach.

These developments suggest that in college teaching the paradigm has shifted (Borin 2001). There has been a movement away from thinking of the professor as the “sage on the stage” to a more interactive style of learning in which the professor’s role may involve serving instead as the “guide on the side” (King 1993; Slunt and Giancarlo 2004). Even in large sections, professors are now expected to do more than just present appropriate content through the lecture method. Over the years, most of us have focused on developing our “telling” skills and made significant advances in this regard. As faculty members of the 21st century, however, we need to work hard retooling ourselves by further developing our questioning, probing, and listening skills to enable a more interactive classroom environment.

Rather than telling students what we know, we need to ask questions that lead students along the path of learning. We also need to become better storytellers, speak more vividly, communicate more visually, and we need to work hard to create and then maintain student attention to the learning task at hand by keeping them active and involved. While PowerPoint software enables easy development of what our students from the 1980’s wanted in terms of smooth, professional, and visually-oriented delivery of content, that format often stifles what students of the 21st century demand in terms of active involvement and interaction.

At a minimum, if the PowerPoint slides are available online or are printed and distributed to students as class notes, consider leaving a lot of blanks in the presentation so students will attend class and keep busy during class filling in the blanks. This provides a form of kinetic learning that used to take place when students took notes during class as they listened to the professor’s lecture. Frequent questions, requests for identification of examples, and other forms of interactions need to be part of each class session (Christensen, Garvin, and Sweet 1992).
As we plan our classes, we need to go back to the beginning and ask ourselves “what are we trying to achieve?” For most professors teaching marketing courses, an important goal is to help our students develop the professional skills necessary for a career in business, usually within a sales or marketing context. Every survey of what recruiters want from our graduates suggests that content knowledge ranks low on the list (e.g., Ackerman, Gross, and Perner 2003; Borin and Watkins 1998; Taylor 2003). Instead, recruiters place far more value on having a professional orientation along with the ability to communicate, to make reasoned decisions, and to work in teams.

Our students can certainly benefit from some degree of content knowledge and this is typically achieved through the lecture method. Other aspects of the skill set which employers seek, however, are not generally maximized by a lecture approach to teaching. A far more interactive style of learning is necessary. Experiential exercises, role-playing, computer simulations, project-oriented classes, internships, and the case method are more useful and effective ways for students to develop the skills they need to succeed in life and, more specifically, in their careers. While all of these teaching methods serve important roles in the student’s learning portfolio, this paper will focus on how the student’s educational development can be enhanced through cases.

THE ROLE OF CASES

The case method has been and will become an even more important means for facilitating interactive learning in the 21st century (Barnes, Christensen, and Hansen 1994). While the case method is evolving, it has a rich history in marketing education. Years ago, Gragg (1940) argued that even though the lecture method is effective for learning about facts and principles, the case method should also be used “because wisdom can’t be told.” In other words, just knowing about marketing has not been viewed as adequate preparation for a career in marketing. The student must have opportunities to practice solving marketing problems and making decisions. This is the essence of what the case method is all about.

Perhaps a comparison with learning how to swim will help make this point more clearly. It is not possible to become a good swimmer without actually getting in the water and practicing your stroke. No matter how many books you may read about swimming, no matter how many lectures on water safety you may attend, and even if you thoroughly understand and have mastered all of these instructional materials, you still have to get in the water and practice splashing around in order to learn how to swim.

In a very real sense, the same is true as students work to further develop skills and abilities as marketing executives. To become proficient, there must be practice at making decisions. Case analysis is useful in developing the ability to get to the heart of a problem, analyze it thoroughly, and to indicate the appropriate solution as well as how it should be implemented. An outstanding business education goes beyond the transmission of important facts. The recipient of an outstanding collegiate business education does not simply learn in order to know. This person learns in order to act. The case method is an excellent mechanism for developing this ability to its fullest.

EVOLUTION OF THE CASE METHOD

The case method evolved during the 1920’s at the Harvard Business School. Other professional schools such as medicine and law had earlier used the case method of instruction. One of the early proponents of the case method, Charles Gragg (1940), defined a case, as used in the business school, in the following way.

A case is typically a record of a business issue which actually has been faced by business executives, together with surrounding facts, opinions, and prejudices upon which the executives had to depend. These real and particularized cases are presented to students for considered analysis, open discussion, and final decision as to the type of action which should be taken.

Cases vary tremendously in terms of length, complexity, and topical problems. But every case is similar in the sense that a company and the situation it faces is described. The best cases are those based on true situations that real executives faced. Students seem to enjoy most the cases with well known companies when the real names of the involved executives are identified. Only a little literary value is lost, however, when the names have been changed or when the company is small or obscure. The case can still be a great learning mode if the problems addressed are highly realistic, interesting, and relevant. To a great extent, when a student learns by the case method, he or she is operating within a simulated business environment. Often the case requires the student to assume the role of one of the executives and “handle” the case problem or opportunity. That is why the case needs to be realistic and reflective of the type of business problems that the student is likely to face after graduation.

Some cases are extremely long and provide page after page of details, facts, figures, historical information, forecasts, and many other types of data. One of the learning objectives here is for the student to figure out how to sort through the information maze, ignore irrelevant or even misleading data, and focus on what matters. Other cases are quite brief and the information provided is very sparse. In both instances, some students are tempted to complain that “not enough information is provided to make a decision.” Welcome to the real world of decision making! We need to remind them that executives never have as much information as they would like to have.
It is not practical to achieve the goal of “maximum information” because:

1. **Research is very expensive.** Beyond some point, the value of additional information diminishes to far less than the cost of obtaining it.
2. **Research requires a lot of lead time.** Often, executives are unable to wait for the research to be completed. Decisions must be made now. Furthermore, the original situation could change completely by the time the additional research is completed, thus making the study worthless.
3. **Information overload can be as troublesome as the lack of perfect information.** To analyze endlessly is to miss the opportunity to take action and gain a competitive advantage.

Consequently, students need to learn to make marketing decisions under a variety of information levels. Each case provides some degree of information and students should work within that constraint. While “googleing” the company name and people identified in the case may be interesting, subsequent information found there should be considered beyond the assignment for the class. Indeed, one of the student’s greatest challenges is determining what information provided in the case is useful and what is not relevant. Sometimes, case writers will tempt students with data that have little bearing on the case to see if the student detects this and is not distracted from the main issues.

Some students wonder “How are cases developed? Who writes cases and what is the writer’s inspiration?” There is merit in explaining to students that most cases are written by professors who teach by the case method. Often, the case represents a previous consulting assignment. Frequently the company, or the problem it faced, may have been of some special academic interest to the casewriter.

Cases involve real-world companies and the real-world problems they face. Often, the names of the company and the people discussed in the case are disguised in order to “protect the innocent.” Some companies would be reluctant to provide case writers with access to confidential records if the real name of the company was going to be used in the case. It is important to realize, however, that cases are never intended to show good or bad examples of marketing practice. Case writers have a professional obligation to simply develop cases that are academically sound and useful in the education of our students. Furthermore, cases that are written in an attempt to gain favorable publicity for a firm or to express disapproval are unacceptable.

**STUDENT EXPECTATIONS AND THE CASE METHOD**

Students may find their role in a marketing case course better defined if the purposes of the case method of instruction are specified. While each professor may have a slightly different perspective, this list represents some of the more important purposes often mentioned by professors who use cases as an instructional technique. Use of the case method is intended to help the student do the following:

1. learn how to put textbook knowledge into practice,
2. get out of the habit of being a receiver of facts, concepts, and techniques and into the habit of diagnosing problems, analyzing alternative solutions, and developing implementation plans,
3. to solve problems on his or her own (or in a group), as opposed to relying on a professor or a textbook for “the right” an answer,
4. learn about a wide range of firms and problems or opportunities, providing a basis for comparison that might have taken a lifetime of personal experience to appreciate,
5. develop the ability to identify and comprehend the main and subordinate ideas in written material,
6. develop the ability to separate his or her personal opinions and assumptions from those in the case, and to distinguish between fact and opinion in the case itself,
7. develop the ability to organize, select, and relate ideas and develop them into a coherent and effective written or oral presentation,
8. develop skill in exchanging critical and constructive ideas, especially during class discussions,
9. develop reasoning and logic skills,
10. deal with constructive criticism and learn from it.

Once the student understands the purpose of the case method and why it is used, he or she is less likely to be preoccupied with “what is the right (the one and only!) answer to the case?” Instead, the student should learn to focus on logical and reasoned approaches to the problem and should appreciate the fact that a number of solutions are usually feasible. In the tradition of legal education, our students should also be encouraged to develop thoughtful and persuasive arguments supporting the solution which they chose. One of the benefits from a case approach to learning for advertising, marketing, and sales students is the practice they can obtain from “making the case” for their suggested solution to the problem faced by the firm.

**THE STUDENT’S ROLE IN THE CASE METHOD**

Each student has an important role to play in a case oriented class session. Each student is responsible for productively contributing to the class discussion. In fact, students should do most of the talking in a case oriented
course. If a professor speaks more than one-fourth of the time during a class period in which a case is covered, the professor has not facilitated the maximum learning on that day. Better preparation, at least some scripted and sequential questions, and an obstinate insistence on asking rather than telling during a case discussion can help the professor maximize the learning.

While each and every student has a responsibility to participate and to productively contribute to the class discussion, the professor should manage the discussion so that no one dominates the discussion. All too frequently, a small number of students carry the discussion for the rest of the class. It can be easy but not ideal for the professor to allow that to happen. Each student has a unique opportunity to provide a benefit to the class by offering insights concerning the case. Encourage those who don’t volunteer by asking them questions, especially when it is likely that they will be able to provide an interesting response. Asking for a personal opinion is a low risk way to achieve this result. Search for opportunities to praise the formerly reluctant participant and to otherwise encourage widespread inclusiveness through discussion. Initiate a proactive grading policy which includes rewards and punishments for class discussion to further encourage students to gain from the case approach to learning.

An article by Stone (2000) provides a very useful set of guidelines for facilitating case discussion by suggesting basic categories of questions: the initial question and follow ups. That paper also includes a very insightful set of professor responses to student comments suggesting general approaches for acknowledging, paraphrasing, open-ended inquiry, digging in, challenging, generalizing, and assertion. There is an art to asking questions and it can be practiced and rehearsed, at least to some extent. A special type of “classroom magic” happens when students learn through self-discovery that is enabled by the professor’s skilful use of questions.

Along with its outcome advantages, learning by the case method is hard work – for the students and the professor. It is imperative that everyone is well prepared for each case. If the students haven’t studied the case before class, it is unlikely that they will learn much from listening to the other students discuss it. To a much greater extent than in a lecture oriented course, students get out of a case oriented course exactly what they put into it. If they study extensively prior to class, concentrate on the discussion during class, contribute productively to this discussion, and reanalyze the case and its discussion afterwards, they will benefit greatly from the experience.

It has often been suggested that student preparation for a case discussion should consist of three steps. First, they should quickly scan the case from beginning to end to get some idea about the general nature of the case. Secondly, they should go back and read the case very carefully. They should take notes and make an obvious effort to learn the facts relevant to the case. The development of a time line and a list of characters along with affiliations can be very helpful. Finally, after extensive reflective thought on the case problem and possible solutions, they should again read the case for details. After this reading, they should anticipate several questions that might be asked and make some notes on how to respond. With this preparation, the student should begin to feel comfortable that the facts of the case, the major problem, and several feasible solutions are understood.

Case learning can be frustrating for several reasons for both students and professors, but is well worth the extra effort. If there does not seem to be much progress at first, stick to it and don’t get discouraged. For any given case, students usually experience a series of feelings. First, there is often a feeling of being overwhelmed by the abundance of information provided in a particular case. This is normal and indicates that the content of the case is appropriately challenging to the students. Next, students usually are confused about how to proceed due to the ambiguity of the case assignment. As time goes on, they become torn by the fact that many different alternatives seem reasonable, and they are usually curious as to whether they have selected the “best” one. Finally, they are uncertain about how to put all of this together in a paper or for a class presentation.

The value of case learning can’t be appreciated in a day. Instead, the generation of wisdom through the case method is something that occurs over time by going through the above mentioned steps over and over again by studying the problems faced by a large number of marketing executives. Over a period of months or years, students become effective decision makers as they progress through the stages of an initial reaction of frustration, followed by an arousal of curiosity, the development of insight, and finally the achievement of administrative power (Hargrove 1973).

In addition to the value of the class discussion of a case, there is merit in requiring written analyses of cases. This, of course, helps the student develop cognitive as well as written communication skills. The requirement of a written assignment relating to the case encourages the student to prepare for the case discussion prior to class. If the primary purpose of the case is to simply stimulate a good class discussion which is necessary as a lead in to an important teaching point, it may be possible to substitute a very brief (under 5 minutes) quiz at the beginning of class on the important facts presented in the case. This has the benefit of enabling the coverage of more cases during the term, avoidance of a reliance on team assignments for the cases, and the professor can complete the grading very quickly in order to focus time on other issues such as the development and sequencing of questions for the next case.
HOW TO PREPARE A WRITTEN CASE ANALYSIS

Realize that every case is different. Because of this, any structured list of steps for preparing a written analysis of a case must be subject to adaptation. There are some general guidelines, however, that you can provide to students. First of all, remember that very few cases have only one absolutely “right” answer. There are almost always a number of feasible solutions. The student’s job is to analyze these and make a reasonable recommendation that is fully supported by logical reasoning, corroborating evidence found in the case, and other persuasive material which further contributes to the apparent wisdom of the recommendation. A professor who is highly effective at helping students develop these skills may become perceived as a “master teacher” (Luthy 2001).

Next, students must be encouraged to plan their schedules so that they have adequate time to prepare the case report. This is hard work and they need to know that they should expect to devote considerable time and effort to it. Advise them that they will experience some delays and to plan their schedule so that they do not have to rush and attempt to prepare the report on the day before it is due.

While not encouraging them to “sell the sizzle, rather than the steak,” it is critical that they recognize the value of the “sizzle” as it relates to a well written report. It greatly influences the reader’s perception of the overall quality of the report – even if the reader tries to read for content with less concern for style. Consequently, they need to do an excellent job in preparing the written report. It should be well organized and make effective use of headings, figures, tables, and other visuals that enhance the paper’s readability. While it is hard to explain how to achieve it, but easy to recognize when it occurs, the paper should “flow” nicely.

Obviously, it should be neatly printed on white paper without a significant number of typing, grammatical, or spelling errors. The paper should be very carefully proof-read – then proof it again! Recommend that the paper be stapled in the upper left corner, rather than placed in a binder which may not fit in a file drawer. In addition, binders often break apart while the paper is being read.

There are many ways to organize the written case analysis. Some professors simply require responses to essay questions at the end of the case, in the proper order. This approach has the advantage of enabling the professor to use the case in more than one semester by changing the questions. This has considerable merit because we do a better job in class when we teach cases that we have used before. Indeed, at some point we master the content and can focus on our questioning sequence and how we can make important teaching points with a given case.

If the development of decision-making cognitive skills is the prime learning objective, then a more open-ended, less structured paper should instead be required. The problem-to-solution type of organization is often suggested. Again, some cases may lend themselves to a particular format while others don’t. Marketing professors may find it useful to provide students with excerpts from the following traditional problem-to-solution approach for written case analysis.

Situation Analysis

The first section of the case report often includes a discussion of the situation confronting the company. An analysis of its environment, specifically its competitors, customers, trends in the industry and other relevant environmental information that pertains to the case issue, are often included here.

The purpose of the situation analysis is to set the stage for subsequent analysis of the problem and its solution. In addition, the situation analysis should help the writer and the reader understand the relevant facts that have a bearing on the firm.

Students should be careful, though, to avoid simply summarizing the case facts in the situation analysis. As the phrase “situation analysis” indicates, there should be some analysis – some clear identification of what these facts really mean to the company and the case issue. Avoid “rehashing” the case, instead, the situation analysis should be used to very clearly show that the context and environment in which the firm operates is well understood. Showing what this means to the firm and how it impacts the firm’s activities is crucial.

Perhaps an example will help clarify the difference between rehashing and analyzing. Consider the following excerpt from a case.

The Federal Express Company was founded in 1975 as the largest startup venture capital investment in U.S. business history. Its success revolutionized package and document delivery and by 2004 Federal’s highly entrepreneurial management had built sales to over $24 billion annually.

Here is a rehash of these facts. “The Federal Express Corporation first began operations in 1975. The management style can be characterized as entrepreneurial and the firm now has over $24 billion per year in sales.” On the other hand, here is a brief analysis of the case material. “The Federal Express Company was founded in 1975, one of the most dramatic eras of deregulation in American business history. Its growth in annual sales to over $24 billion by 2004 represents one of the highest rates of compound growth ever seen. Surely there must be a number of reasons for this level of success. The firm’s style of management is one that encourages experimentation and rewards performance. The firm is also willing to take significant risks, and at least so far, they have succeeded. Obviously, this rate of growth and the firm’s managerial philosophy have created a work environment
in which change is the only constant. Therefore, we would expect an active new product development program and managerial receptivity to innovation . . .”

Some people find that preparing a discussion of the firm’s strengths, weaknesses, opportunities (including its distinctive competencies), and threats is a useful approach that reduces the tendency to rehash the case facts.

Identification of the Problem or Opportunity

In many cases, there is one central problem or opportunity that must be addressed. Often, there are additional minor problems or opportunities, too. The purpose of this section of the report is to very clearly identify these problems or opportunities.

Often, the case writer makes it easy to find the “true” problem. Sometimes, though, there may be lots of evidence provided in the form of symptoms, but the search for and identification of the problem is left to the student. Students should very carefully study the case before finalizing the problem statement. This is very critical because all of the subsequent analysis should be directed towards ultimately solving this problem or showing how to best seize the opportunity.

Also, be careful to identify a problem that truly can be solved. For example, if the case is written from the perspective of a junior executive and the student defines the problem as “incompetent top management,” the junior executive is hardly in a position to gain implementation of a solution that involves firing the firm’s current top management team.

Identification and Analysis of Alternatives

Once the problem has been accurately and specifically defined, the next step is to identify several creative and reasonably effective solutions. These alternative solutions should reflect actions which the firm could implement in order to solve the problem(s) you earlier defined. Often, the identification of these alternatives requires some creative thought and a deep understanding of the situation facing the firm. Brainstorming may help. Reading about how other firms have dealt with similar problems may also be useful. Asking experienced executives about options is also a good way to generate a list of reasonable alternatives.

A useful way to analyze these alternatives is to list the pros and cons, strengths and weaknesses, or the advantages and disadvantages of each approach to solving the problem. Remember that each alternative must address the specific problem earlier defined in the paper. Remember, too, that the alternative solutions should be mutually exclusive – there should be no overlap. Ideally, they would be totally exhaustive, but this may result in a list that becomes unmanageable, due to its length.

Recommendations

The next part of the report should indicate which one of the alternatives is recommended as the preferred solution to the problem. More importantly, the paper should very clearly and convincingly explain why this is the best solution. There should be a very persuasive argument that is supported by evidence from the case, statistics and references from other sources, as well as obvious logic and reasoning skills.

It is not critical that the student comes to a conclusion reporting the one and only “right” answer. It is critical, however, that the student be held accountable for convincing the reader of the wisdom of the decision. Remember that several of the alternatives had merit. The student’s job is to choose the optimal solution and support the decision ardently.

Implementation

The recommendations must also be implemented. This is often a stumbling block for students. They devise what they think is a great solution, only to find out that it would be far too costly to implement, or that it would take too long, or that it would be impossible to convince important stakeholders to accept the solution, or some other factor makes the previously viewed “great” solution unacceptable because of implementation constraints.

Consequently, this final action of the report should specify in great detail the implementation plan. It should answer such questions as who, what, how, when, and where. In addition, an estimate of the cost of implementing the solution should usually be included.

A useful checklist is provided in Table 1 to help in the preparation of a written case report. This can be modified in a variety of ways as course needs change. It is also important to note that professors can change the requirement for written analyses of cases from semester to semester. This will be necessary if cases are used more than once or if there is reasonable concern that a written analysis of the case may be available from an on-line source.

REMEMBER THE REASON, PRESERVE THE PASSION: A FINAL NOTE

Case work is interesting, challenging, and rewarding. Both professors and students will have to work hard to earn these benefits. The tremendous learning rewards are well worth the extra effort. Many of our country’s top business executives have been educated by the case method. There are no magic secret bullets that enable high achievement over the long run without tremendous effort. Lots of time must be devoted to important tasks. People who achieve great success almost always work very hard
TABLE 1
A WRITTEN CASE ANALYSIS CHECKLIST

CAN EACH OF THE FOLLOWING BE ANSWERED WITH A “YES”? 

**PROBLEM**

1. Is the case problem (opportunity) correctly identified?
2. Is the problem description accurate?
3. Does the problem definition have a reasonable degree of breadth?

**SITUATION ANALYSIS**

1. Were the relevant facts or data examined?
2. Is the analysis of case facts and data appropriate to the case problem and alternatives?
2. Is your interpretation of case facts and data accurate?

**ALTERNATIVES**

1. Is there a complete identification of alternative solutions to the stated problem(s)?
2. Are the advantages and disadvantages of each alternative clearly enumerated and discussed?
3. Did the identified alternatives demonstrate creative thinking?

**RECOMMENDATION**

1. Was a clear decision made as to the most appropriate alternative?
2. Is the selected alternative a logical and reasonable choice, given the defined problem and the firm’s situation?
3. Is the decision sufficiently supported and justified?

**IMPLEMENTATION**

1. Are the plans necessary for implementing the recommendation clearly specified?
2. Have questions about the who, what, how, when, and where of the implementation been answered?
3. Is the cost of the implementation clearly specified and justified in relation to the value of the recommendation?

As you consider this extra work ask yourself this question. “Why did I get into this business?” For most of us, it is because we wanted to teach. Indeed, we passionately wanted to positively impact students through teaching. While research and service are also important, the reason that we endured such a long and usually poverty-stricken socialization/skill development stage of life (earning the Ph.D.) was because we wanted to make a difference with students.
A great way to improve teaching is to observe other teachers in action. It is possible to learn about teaching from every observation. Watching great teachers provides an excellent opportunity to engage in what trainers call role modeling. Watching a few klunkers can also be a good learning experience if extra attention is paid to what does work well versus what does not work.

A good way to get these observational experiences is to volunteer as a peer teaching evaluator or teaching mentor. In some departments, such peer evaluations are required. New people on the tenure track and master teachers may appreciate this form of assistance. In addition, some schools are now requiring or at least encouraging team teaching. If you are part of a teaching team, show up to observe how your teammate teaches.

Another way to observe others teaching to learn how to improve your own is to get involved with executive development training. This often requires or at least encourages the opportunity to be present when others lead the training. Often, too, this teaching represents the best that this teacher has to offer because of the nature of the audience and the financial compensation provided. As the day unfolds, focus on audience reaction to each and every aspect of what the teacher does.

Embrace these notions about the noble importance of teaching. We are in the helping profession. Most of us enjoy working with students. Find more ways to do this and then cherish that opportunity to serve. Get more active with student groups, go to graduation parties, invite students to get involved when you have lunch with recruiters, etc. The key is to spend a higher proportion of your work week with students. This may sound obvious but a lot of people in our business do not do this. Remember, this is the best job in the world!

REFERENCES


