

Best Practices for and Outcomes of Implementing Live Cases in Marketing Courses

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Purpose of the Study: This study aims to improve the implementation of live cases (client-based projects) in marketing classrooms. Live cases involve direct interaction between companies and students and can be valuable pedagogical tools improving student learning and skill development. However, live cases can be difficult to implement, creating uncertainty for faculty and possibly tipping the risk-reward balance away from this approach. At present, the preponderance of live case research in marketing has been constrained to small sample sizes, leaving faculty to question whether the implementation insights provided will generalize across different contexts and faculty.

Method/Design and Sample: This paper derives insights from an international sample of 169 marketing faculty who have experience implementing live cases in their classrooms. The results, from more than 3,500 sections of live cases in marketing classrooms, provide guidance on key considerations of live case design and implementation.

Results: Findings provide prescriptive guidance to current and potential future live case adopters regarding which marketing classes are most conducive to the technique, optimal sourcing strategies for participating companies, best practices in implementation, and outcomes of live case usage. An easy-to-follow set of six best practices is included for those interested in improving or beginning live case implementation in marketing.

Value to Marketing Educators: For marketing educators, this work can enable greater use of live case pedagogy and improve success and satisfaction, providing techniques for faculty by answering perennial questions in live case implementation and outcomes in a robust international sample.

Keywords: Live cases; client-based projects; best practices; marketing pedagogy; global

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Live cases have the potential to convey substantial value in the marketing classroom. Also known as client-based projects, these real-world experiences typically ask groups of students to explore, problem-solve, and present solutions to an actual business or non-profit as a component of their class grade. Such projects drive real learning, with students gaining not only hard skills relevant to marketing concepts and analytics (Childers et al., 2020; Vinuales & Harris, 2017), but also improving soft skills such as communication, leadership, and team management (Oh & Polidan, 2018; Preston, 2018).

While the benefits to students are well-documented, scholars still question why live cases are not adopted more widely (Bove & Davies, 2009). Extant literature has suggested that live case utilization is time-consuming for faculty, difficult to grade, and can cause lower teaching evaluations by students (Kennedy et al., 2001; Lawton & Walker, 2001; Lopez & Lee, 2005; Palmer & Silas, 2019; Shanahan et al., 2019). Yet, other instructors find live cases can drive student course performance and evaluation (Tofighi, 2021). Live cases are also seen as stressful for students (Elam & Spotts, 2004; Tofighi, 2021), and can be derailed by the professional clients (Lopez & Lee, 2005).

Many questions remain regarding best practices, contexts, and outcomes of live case utilization in marketing classes. Scholars have advanced recommendations such as setting expectations, “selling” the project to students, including sufficient planning time, and carefully selecting partnering companies (Laukkanen et al., 2013; Lopez & Lee, 2005). Importantly, however, while scholars have advanced these insights regarding the utilization of live cases in marketing, this prior work largely relies on author experience and small sample sizes. A recent review of 20 years of literature germane to live case pedagogical research in marketing reveals that of the 18 identified prior studies, all rely on the insights of a few professors and sections of classes (Cummins & Johnson, 2021). In this review, on average, live-case guidance was based on fewer than three courses taught by one instructor using this pedagogical method. Prior to this work, which investigated student learning outcomes, no studies have used a broad sample of professors to obtain generalizable insights into live case usage in marketing classes.

Our goal here is not to repeat this recent review, but rather to overview its main findings and shortcomings, further highlighting the value of this paper. As noted by

Cummins & Johnson (2021) the current literature suffers from a small sample size. Most are observational, with a minority comparing live case and non-live case sections. While a single instructor's experience is valuable, this paper aims to source the wisdom of the crowd to better inform would-be and current live case practitioners.

The current absence of generalizable insights into live case usage in marketing classes creates several gaps in our understanding of the best operationalizations of and contexts for live case usage in marketing classes. For example, of the aforementioned best practices, which is most important? Which is least important? The dearth of generalizable survey data on this topic to date leaves this question unanswered. Additionally, while the literature expounds upon the criticality of sourcing the "right" type of company (e.g., Laukkanen et al., 2013), guidance is limited for marketing professors considering live case usage in their marketing classes. What is the most effective way for sourcing potential companies that marketing professors should prioritize? What is the least effective sourcing strategy that marketing professors may wish to avoid? Next, while the benefits of live cases have been extolled in a wide variety of classes (Popovich & Brooks-Hurst, 2019; Rhee, 2018; Tofighi, 2021), it is unknown which classes are most prevalent and amenable to using live cases—marketing strategy? consumer behavior? others? Last, the outcomes of live cases are equivocal on several variables of key importance to marketing professors. For example, some scholars contend that using live cases increases teaching evaluation scores (Tofighi, 2021) while others surmise live cases have the potential to *decrease* teaching evaluations (Kennedy et al., 2001). Given the possible "dark side" of live cases, this work aims to provide robust advice to those already using or considering the implementation of a live case in their marketing courses. Further, which outcomes are most impacted by live case usage? Teaching evaluations? Satisfaction with teaching? Others?

This paper seeks to fill these gaps in the literature by drawing on an international sample of 169 marketing faculty who have experience implementing live cases in their classrooms. The results, from more than 3,500 sections of live cases in marketing classrooms, provide guidance on key considerations of live case design and implementation. Importantly, findings provide generalizable, quantitative insights regarding live case utilization: marketing classes where it is most prevalent, optimal strategies for sourcing participating companies, the most effective elements when conducting live cases, and outcomes for faculty consideration. This study provides both validation for some authors' implementation preferences and advances the literature's live case knowledge using a generalizable sample; thus enabling greater use of live case pedagogy and providing a proven pathway to improving success and satisfaction with techniques for both faculty and students.

METHODOLOGY

Measures and Pretest

We developed the study measures to answer our research questions germane to the prevalence, best practices, operationalization, and outcomes of live case usage in marketing classes. Prevalence in class type was assessed by a count and the remaining three used sliders in an online survey. For sourcing, we asked participants "How do you feel about sourcing the live case company from the following sources?" from a variety of common sources noted in the literature. Participants responded by moving a slider somewhere in the continuum of strongly opposed (-100) to neutral (0) to strongly in favor (100) for each source (cold calling a local business, advisory boards, personal and professional acquaintances, referrals from former live case companies, other faculty/staff, and current students). For operationalization, we asked, "How important are the following when including a live case component in a marketing class?" and respondents used a slider from not at all important (0) to moderately important (50) to extremely important (100) (please see Table 3 for the operationalization elements included). For outcomes, we asked, "Please indicate your assessment of how including live cases affected the following:" and quantified participants' responses to whether including live cases affected the selected outcomes on a continuum from drastically decreased (-100) to no impact (0) to drastically increased (100) (please see Table 4 for the outcomes included). Lastly, we sought to test two boundary conditions potentially impacting the nature of responses. Specifically, we gathered respondents' current continent and level of research intensity. High research intensity was comprised of R1 and R2 schools whereas high teaching intensity was comprised of balanced and teaching schools.

We pretested our survey to reveal any issues and assure that the items were well-understood by participants. The preliminary survey was given to 14 faculty knowledgeable on live case usage in marketing courses who answered all the items and gave feedback regarding any issues or concerns in open-ended text fields provided on each page of the pretest survey. The respondents' insights and feedback were analyzed and used to improve the final survey. The data gathered from these respondents were not included in the primary sample.

Primary Collection

For our main sample, we gathered data from marketing professors serving as editorial review board members for *Journal of Marketing Education*, *Marketing Education Review*, and *Journal for Advancement of Marketing Education*, in addition to authors publishing in *Journal of Marketing Education* over the last decade. We chose this sampling frame to gain data from a wide array of marketing faculty with insights into live case pedagogy worldwide. A total of 447 invitation emails were successfully delivered to members of this sampling frame. Over half (51 percent; 227

respondents) began the survey. Respondents who had never used live cases (27) and those who did not complete the survey (41) were omitted from the sample. The final obtained sample consisted of 169 marketing faculty (37.8 percent of all contacted).

The sample was comprised of experienced marketing faculty with an average of 20.71 years of teaching experience and an average age of 51.05 years. Further, both genders were well represented with 44.59 percent female and 55.41 percent male for those choosing to provide gender information. Various academic ranks were represented in the sample including 34.3 percent full-tenured professors, 39.1 percent associate-tenured professors, 9.5 percent assistant-tenured track professors, and 8.3 percent non-tenure-track professors (8.8 percent did not specify rank). Last, faculty from various types of institutions were represented including 13.0 percent R1 institutions, 14.2 percent R2 institutions, 55.6 percent balanced institutions where research and teaching are equally valued, and 7.7 percent teaching institutions with lower research requirements and highly-valued teaching (9.5 percent did not disclose institution type). Regarding current country, 71.6 percent of respondents were from North America and no other continent comprised more than 10 percent of the sample (Africa .6 percent, Asia 1.8 percent, Europe 9.5 percent, and Oceania 8.3 percent).

The data were analyzed using SPSS 26. For the marketing course distribution, frequencies were calculated and compared to the total number of sections to provide relative inclusion by course. For the sourcing, operationalization, and outcomes for faculty sections, means were calculated and tested to ascertain if they were significantly different than zero. To do so, we used single-sample t-tests wherein a significant t-value indicates a mean that is significantly different than zero. To test whether country and school research/teaching intensity affect faculty perceptions of live case sourcing, operationalization, and outcomes, two dummy variables were created. North American/rest of world were included for country and research intense (R1, R2) and teaching intense (balanced, teaching) were included for research/teaching intensity. We then ran a series of 54 one-way ANOVAs to see if responses varied by either grouping.

FINDINGS

Most and Least Common Marketing Courses for Live Case Utilization

Respondents provided the number of sections of live case classes they have taught. The most popular application for live case usage in marketing is in the MBA program (22.5% of total). MBA courses are typified by high levels of engagement, group work, difficulty, and application of concepts to real-world problems (Milter & Stinson, 1995; Rafferty, 2013). As such, live cases in MBA marketing courses are a particularly potent means of delivering course content in a way that maximizes engagement and team skills. Furthermore, many MBA programs expect their

students possess a certain amount of professional experience before entering the MBA program (Dreher & Ryan, 2004). Accordingly, the value to the live case company involved in the project can be very high with the potential of superior student solutions.

The second most common class is undergraduate marketing research/analytics (21.6% of total). These courses often spend a considerable amount of time analyzing and interpreting data (Liu & Burns, 2018). While these classes sometimes use a textbook or previously written cases for student projects, there is considerable value in using a live case approach. Finch et al. (2013) note the paucity of the data interpretation and analytical skills required to deliver evidence-based marketing and an 'over-teaching' of research theory as opposed to the interpretation of data to synthesize strategies and plans. In live cases, students can see the real, and sometimes messy, process involved when companies collect, clean, and analyze data. Further, students can directly connect their analyses to real business problems, reducing their level of abstraction.

The third most common application of live case pedagogy is undergraduate marketing strategy/management (13.8% of total). As an upper-level marketing course and, in fact, a capstone marketing course in many schools' programs (Bartholomew et al., 2020), students are generally seniors with a strong base of marketing and other business courses to draw upon for insights. Additionally, a course objective is often synthesizing previous marketing concepts that students have learned into a unified whole. Live case application can help students answer central questions such as "How do I increase this business' revenue through marketing?"

The fourth most frequent course utilizing live cases was undergraduate marketing communication (which included digital, social, and mobile (DSM) marketing; 11.3% of total). The inclusion of DSM marketing is significant in driving this application of live case utilization. The average age for college students who are enrolled in full-time undergraduate programs is 21.8 years (Hanson, 2021). This age aligns with the age range of 18 to 29 for the highest proclivity for social media usage (Pew Research Center, 2021). Accordingly, undergraduate marketing students are in a prime position to provide new insights and value to companies in DSM live cases. Such value is likely amplified when working with a company with a high proportion of the lowest users of social media (older individuals; Pew Research Center, 2021).

With 7.8 percent of total live case usage, introduction/principles of marketing courses can lend well to the live case approach in a manner similar to marketing strategy/management. However, there are substantive differences between these two courses that constrain the adoption of live cases in intro/principles classes. Introduction to Marketing is the first-taken marketing course, and as such, students have not accrued the knowledge of the various domains of marketing to apply to a live case. Additionally, intro courses often contain students with a mix of majors.

Non-marketing majors may not prioritize marketing courses and thus expend lower amounts of effort. Given the need for a high level of engagement typified in live cases (Steuter & Doyle, 2010), this issue could be particularly problematic and constrain live case usage.

Next, selling/sales management courses comprised 5.4 percent of the total. Working with a company where students act as salespeople can provide potential incremental sales for the company as well as valuable experience for the students. However, as the complexity of markets and demandingness of customers continue to escalate (Friend et al., 2019), in-depth knowledge by the salesperson germane to the company, its products, its competitors, and overall industry is increasingly important in making a sale (Leigh et al., 2014). Accordingly, students that have a very limited amount of time to learn these necessary selling facets may not be able to sell effectively in complex selling situations. As such, these projects may be limited to only lower-involvement types of selling (e.g., cold call appointment setting).

Looking at classes with the lowest usage of live cases, international marketing resulted in 3.8% of the total. Live case application may be more challenging in international marketing due to cultural and linguistic barriers. Furthermore, sourcing companies is undoubtedly more difficult when conducted across

countries. Consumer behavior courses comprised only 3.7 percent of the total, despite its nearly ubiquitous presence as a required marketing course (Turnquist et al., 1991). The paucity of live cases in these courses is likely due to the nature of the content of many consumer behavior courses, which can focus on concepts that do not require the involvement of a partner company. Subjects like consumer perception, cognition, and attribution are less amenable to live case approaches. Additionally, certain needs of companies may not be readily met in consumer behavior applications. For example, lab-based experiments may require equipment that is either inaccessible or hard to gain access to in some schools. Furthermore, some schools charge companies for use of behavior/eye-tracking labs and live case projects could cannibalize this revenue. Finally, retailing has the lowest number of live case sections of any marketing course (3.3% of total). While a portion of this variance may be attributable to the content of retailing courses, a likely additional factor is the prevalence of its offering. Retailing is a less-offered elective course (Turnquist et al., 1991), and as such, the low incidence of live case utilization may in part be driven by a lower relative number of classes. Table 1 provides the distribution of live case sections by class type and the percent of total.

Table 1. Live Case Usage by Marketing Class Type

Class	Number of Sections Taught	Percent of Total
MBA Marketing Classes	799	22.5
Marketing Research/Analytics	767	21.6
Marketing Management/Strategy	491	13.8
Marketing Communications ¹	401	11.3
Introduction to/Principles of Marketing	275	7.8
Other	237	6.7
Selling/Sales Management	193	5.4
International Marketing	134	3.8
Consumer Behavior	132	3.7
Retailing	117	3.3

¹ Including Digital/Social/Mobile Marketing.

Sourcing of Companies for Inclusion for Live Case Marketing Projects

A common barrier to live case usage in marketing courses is difficulty in obtaining a suitable company for the live case. Marketing educators have used many approaches to finding candidates for live case inclusion including alumni, current students, and referrals from other faculty (Bove & Davies, 2009; Lopez & Lee, 2005; Shanahan et al., 2019). However, absent from the literature is an assessment of the efficacy of the various sourcing options available to marketing professors. Such knowledge may be critical in increasing the overall success rate in live case usage by providing better starting points for marketing educators. Our survey asked participants how they felt about sourcing the partner firm from a variety of common sources.

Results show substantial differences in perceived favorability in various sources of live case companies. The most favorable sourcing option identified by participants is alumni (mean=60.10). Many schools maintain alumni distribution lists with which faculty can easily access community business leaders. Furthermore, these leaders are more likely to engage in the projects given their familiarity with and potential affinity towards their alma mater. Former students can also be strong candidates as the professor already has a relationship with a company contact, which can improve communication and the case experience.

Personal and professional acquaintances were deemed the second-most favorable manner from which to source live case companies (mean=55.66). As professors' careers mature, they often accrue a long list

of friends and colleagues in the business community with whom they may connect regarding a live case opportunity. Professional networking sites such as LinkedIn can make this endeavor even more efficient due to the ability to quickly access professional network members and send messages regarding interest in the case. Personal and professional acquaintances may be particularly valuable in live case selection as the social relationship may deter issues like slow responses or backing out of the project.

The third most-favored approach is gaining referrals from previous live case companies (mean=49.55). Use of referrals has the potential to both reduce the faculty member's time investment as well as increase the value of the project. Former live case companies know what is or is not a good fit for the project, and thus their recommendations can reflect this knowledge in selecting an appropriate company. Additionally, they know the requirements and structure of involvement in live case projects, and can select individuals that are willing and able to invest the necessary time to make the live case incorporation a success.

The fourth most favorable approach for live case company acquisition is other faculty and staff (mean=44.52). These internal contacts are likely well-situated to determine if a given company would be a good fit for the project given their knowledge of the professor, class, and company. Further, this option may be particularly valuable for less-experienced faculty. Younger faculty may not have as many contacts as their more-experienced colleagues and thus this approach may be of enhanced value for them.

The last of the favorably-viewed company acquisition methods is advisory boards (mean=39.35). Many colleges and programs have advisory boards comprised of highly engaged business leaders. Professors may offer their live case opportunities to these members. Doing so can provide multiple benefits

in that the professor gains a company contact that is highly motivated to maintain a positive image in front of their peers and colleagues on the board. Further, an advisory board-selected live case company is a potent way to show members of the board the value the marketing program provides to the business community.

Overall, respondents were neutral regarding the use of current students as sources for the live case company (mean=-4.30, however, $p > .05$). On the plus side, current students are motivated to acquire companies to participate as their grade is affected by their ability to do so. However, a substantial drawback likely canceling out this positive aspect is current students' lack of understanding of the project and limited timeframe. Regarding lack of understanding, even after a discussion of the project with the professor, students will have far less insight into what makes a great candidate for a live case company. As such, their selection may be suboptimal. As the setup of live case projects can take a considerable amount of time, having current students select companies limits the amount of time they and the professor can work with the company and thus successful outcomes may be more difficult to come by.

Finally, cold calling a local business is the only source of live case company sourcing that was viewed unfavorably (mean=-13.30). Cold calling is a risky strategy when selecting a partner. While the professor may get lucky with a perfect fit, companies that are cold-called may not feel the same sense of connection or obligation to the school. As success with live case projects requires committed company partners (Lopez & Lee, 2005) marketing faculty may be advised to avoid cold calls when sourcing companies. Table 2 provides sourcing means, standard deviations, t-values, and p-values.

Table 2. Live Case Sourcing

	Mean	Std. Deviation	t-value	p-value
Alumni	60.10	36.16	19.81	< .001
Personal and professional acquaintances	55.66	40.94	16.14	< .001
Referral from former live case companies	49.55	43.04	12.56	< .001
Other faculty/staff	44.52	40.83	12.43	< .001
Advisory boards	39.35	48.33	9.10	< .001
Current students	-4.30	60.75	-0.81	0.42
Cold- calling a local business	-13.30	62.06	-2.31	0.02

Effective Operationalization of Live Cases in Marketing Classes

Many scholars have noted the difficulties that can exist in implementing live case projects in their marketing classes (e.g. Elam & Spotts, 2004; Kennedy et al., 2001; Shanahan et al., 2019). Suggestions have been made on various concerns, such as starting the process early, setting expectations, and encouraging/incentivizing students (Laukkanen et al., 2013). In our survey, we asked participants the

importance of each of these and other facets when including a live case component. Participants responded with a slider indicating this element was not at all important (0) to moderately important (50) to extremely important (100). Results revealed a clear top four consisting of starting the process early, setting expectations with students, setting expectations with companies, and selecting the right company (all four within .42 on means).

Starting the Process Early. Live case projects are complex endeavors that require a reasonable amount of work to effectively implement. An early start to the process ensures that the professor has sufficient time to meet with the company, discuss the project parameters, draft a project plan, and have several iterations of back-and-forth edits with the company. Further, executives agreeing to participate in live case projects likely have many other aspects of their business life competing for their time and attention. As such, companies can back out of the project. When the faculty member has sufficient time to recover from this occurrence, the project can still be effectively enacted. However, if this happens last minute, a successful outcome of the live case project is unlikely.

Setting Expectations. Respondents also noted the criticality of setting expectations – both with students and with the involved companies. For students, a live case project may represent a key departure from other projects in their academic career. When previously written cases are used, deadline punctuality and professionalism of involved students do not have any external impact on the school. However, when live cases are used, such issues can have a negative impact on the public perception of the school. As such, clear expectations for conduct and deliverables germane to the live case are extremely important.

For companies, a considerable amount of work is required to participate in live case projects in a meaningful manner. Companies must dedicate substantial effort in drafting the case, answering student questions, and reviewing projects and presentations. Upfront and realistic estimates for the level of required involvement can prevent misunderstandings that may negatively impact the project.

Selecting the Company. For live case projects, not all companies are created equal. Some companies' products, personnel, and philosophies are more amenable to live case projects than others. As such, it is very important for marketing professors to generate a wide pool of candidate companies and choose carefully the companies they select to engage with. Professors should be particularly in tune with warning signs that may manifest prior to agreeing to select the live case company, such as slow response time to communications, perceived ambivalence or negative views towards participation, rigidity in how they are willing to participate, etc. Attending to these signs and selecting a better alternative company will both improve the project and prevent faculty aggravation.

Professors can also look for observable characteristics that might make one type of company more amenable to the project. For example, respondents felt selecting a business-to-consumer (B2C) company was important in contrast to selecting a business-to-business (B2B) company (mean=45.41). B2C companies possess attributes that may make them more attractive than B2B companies for live case

projects. B2C companies are more relatable to students as they can more clearly envision themselves or people they know purchasing the product. This relatability may in turn result in a higher level of excitement and involvement for students in engaging in the project. B2B companies have a higher level of abstraction that may be especially challenging for undergraduate students.

Beyond setting expectations, it is important for marketing professors to “sell” the students on the value of the live case upfront. Live cases convey many positive benefits to students. For students lacking extensive prior marketing experience, the project can be a valuable addition to their resume and help with interview talking points on applied marketing. Sometimes students get job offers or letters of recommendation from participating companies.

Lastly, grades are a strong motivator and professors can emphasize the importance of the project in determining students' final grades. In fact, we asked this question—“What percent of the final grade do you generally weigh the live case project? 0 to 100?” Respondents indicated that a substantial portion of the final grade (mean=39.98%) is based on students' live case performance. This average is much lower than is called for by some live case authors advocating for 75% of the course grade to stem from live case performance (Elam & Spotts, 2014).

The professor's work is not complete after the final papers have been submitted and presentations to the participating company are done. Respondents indicated that providing a final debriefing to students was critical (mean=74.20). For the students, they will have learned many different elements germane to marketing that may be difficult to connect into a unified whole. Marketing professors can help students piece together learnings from the process to improve their takeaway insights. For the professors, live cases are challenging endeavors requiring continuous improvement to perfect. Direct feedback from students – positive or negative – regarding their experience with the live case can help professors make important decisions on elements to retain and those to improve in future runs of the live case.

The least important aspect in the operationalization of the live case project is providing students a financial incentive (e.g., a gift certificate or cash prize to the winning team; mean=20.24). While no students would look unfavorably on receiving extra money for their performance, it is not essential for successful application of the live case, as students have other motivators. As noted, the live case is a large portion of students' final grades and students are highly motivated by grades (Covington, 1999). Further, the group nature of most live case projects may instill some motivation through social pressure for students to do a good job in their part of the project. As such, financial incentives for student performance are not requisite. Table 3 provides the operationalization means, standard deviations, t-values, and p-values.

Table 3. Live Case Operationalization

	Mean	Std. Deviation	t-value	p-value
Starting the Process Early	83.33	16.66	61.45	< .001
Setting Expectations with Students	83.13	16.53	62.83	< .001
Setting Expectations with Companies	83.04	18.60	54.86	< .001
Selecting the Right Company	82.91	17.61	58.23	< .001
Debriefing Students at the End	74.70	23.17	37.59	< .001
Generating a Pool of Potential Participating Companies	72.22	26.78	32.36	< .001
Selling Students Upfront the Benefits of the Live Case	70.88	24.54	34.05	< .001
Selecting a B2C (instead of B2B) Company	45.41	37.52	12.92	< .001
Providing Students Financial Incentives	20.24	33.17	6.40	< .001

Outcomes of Live Case Usage in Marketing Courses

Scholars have expounded upon the payoff of using live cases in their marketing classes (see Elam & Spotts, 2004). Live cases have been purported to increase satisfaction, teaching evaluations (Dommeyer, 1986), and student job opportunities (Bove & Davies, 2009; McCale, 2008). However, there are also inherent costs associated with live case usages of which educators must be cognizant. To better understand these potentials and pitfalls, we quantified participants' responses to whether including live cases affected 11 outcomes on a continuum from drastically decreased (-100) to no impact (0) to drastically increased (100).

Value to Students. Results show that live case projects in marketing classes are particularly valuable to students in both their overall learning (mean=68.25) as well as generating job opportunities (mean=48.25). Scholars have consistently called for incorporating more of the "real world" in business curriculum (Ehiyazaryan & Barraclough, 2009). One of the primary rationales for this inclusion is improving the learning experience for students to better prepare them for the realities they will experience in a marketing role.

Live cases provide a more immersive and in-depth learning experience. Additionally, students job opportunities may increase – both directly and indirectly. Directly, some live case company participants may be extremely impressed with the students they interact with and offer them an internship or job after the project. Indirectly, as noted, students with lower levels of marketing experience can include the live case project on their resume, thus increasing their odds of being interviewed or selected for a position.

Value to Faculty. Using live cases in marketing classes is valuable to professors for both intrinsic and extrinsic factors directly related to teaching. Professors noted that including live cases in their curriculum had a substantial impact on the satisfaction they get from teaching (mean=56.20). Live cases are challenging and require considerable effort, but professors recognize how they improve their courses and enjoy their implementation and outcomes. Furthermore,

respondents note that live cases have a considerable impact on the teaching evaluations they receive from students (mean=41.67). As teaching evaluations are often an important component of faculty tenure packets as well as annual reviews, these higher evaluations benefit faculty.

Live case projects are also excellent ways in which marketing faculty can build their reputation with both internal and external stakeholders. Live case projects increase the status of the professor in their perceived value to the school (mean=34.20). Beyond increasing teaching evaluations, helping local companies is an excellent way to generate positive public relations attention for the school and thus increases the faculty's status. The use of live cases in marketing courses also increases the faculty member's reputation with the external business community (mean=53.25). Especially for early-career faculty, live case projects can be an effective way to build their brand in the business community.

The direct external benefits, however, are less pronounced. While still contributing positively, live cases have far less impact on driving company data acquisition that can be used for publishing research (mean=19.29) and donations to the school (mean=15.71). For data, given the increasing rigor demanded in today's publishing environment (Adler & Harzing, 2009; American Marketing Association, 2019), data that is amenable for student projects may not be robust enough for use in a journal submission. Further, as some live case companies may be relatively small, they may not capture all the necessary data a researcher would need for an empirical article. For donations, while some live case participating companies may be inclined to donate what they have received from the class, others may not have the resources to do so or may elect to give a financial gift directly to the students who participated in the project in the form of a prize. Further, some companies may possess the view that the time they spend with students completing the project was their contribution (versus a monetary contribution).

Costs to Faculty. While faculty viewed far more favorable versus unfavorable outcomes of using live

cases in their marketing courses, they did note key drawbacks of utilizing this approach. Faculty using live cases in their marketing courses indicated a substantial increase in the time required to teach the class (mean=57.00). Beyond the increased setup time and time required in meeting with the live case company, students ask far more questions when a live case is used (mean=57.64), also necessitating more time by the professor. Time is a commodity in short supply for higher-education faculty with faculty working on average 54 hours per week before the pandemic (Link et al., 2008).

Furthermore, some faculty perceive any extra time teaching as particularly detrimental as it reduces the amount of time available for research. As such, factors increasing the time required to teach a class are likely to be perceived as especially negative for faculty. This factor may offset some of the positive factors of live case incorporation (e.g., teaching evaluations, reputation in the school) which results in a faculty perception that they are not personally incentivized to use live cases in their classes (mean=-2.72, however, $p > .05$). Table 4 provides the outcome means, standard deviations, t-values, and p-values.

Table 4. Live Case Outcomes

	Mean	Std. Deviation	t-value	p-value
Overall Student Learning	68.25	28.39	30.31	< .001
Satisfaction with Teaching	56.20	34.41	19.6	< .001
Reputation with Outside Companies	53.25	33.71	18.36	< .001
Student Job Opportunities	48.25	28.38	19.97	< .001
Teaching Evaluations	41.67	40.32	12.10	< .001
Faculty's Perceived Value to the School	34.20	29.50	12.16	< .001
Acquisition of Company Data	19.29	30.27	5.26	< .001
Donations to Your School	15.71	35.02	4.09	< .001
Personal Incentives	-2.72	30.52	-0.69	0.49
Amount Questions Students Ask	57.64	30.78	23.09	<.001
Teaching Time Required in the Class	57.00	33.25	20.64	<.001

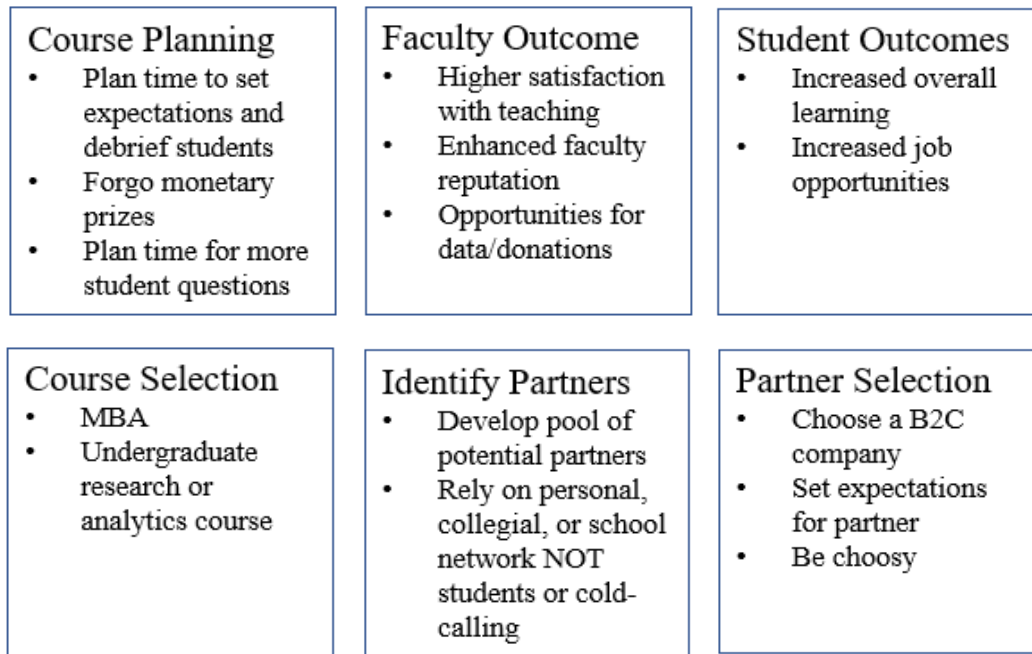
Finally, in this manuscript we wished to assess two boundary conditions with the potential to affect the nature of responses—level of research intensity and country. Overall, the results of the 54 ANOVAs performed indicated few differences between groups with only four significant effects. Regarding level of research/teaching intensity, findings revealed only one significant difference between research and teaching schools. Providing students financial incentives ($F = 2.61$, $p < .05$) was deemed of lesser importance in teaching-oriented schools ($M = 10.43$) than in research-oriented schools ($M = 23.88$). Regarding country, we found three significant results between North America and the rest of the world. For sources, advisory boards were preferred to a greater extent in North America ($M = 44.78$) than other parts of the world ($M = 14.48$) ($F = 7.46$, $p < .05$). Additionally, current students were seen as a poor source of companies in non-North American countries ($M = -25.08$) whereas North Americans were neutral on this source ($M = 3.92$) ($F = 5.06$, $p < .05$). Last, for outcomes, non-North American countries viewed live cases as having a greater impact on their

teaching evaluation ($M = 58.29$) than did their North American colleagues ($M = 35.25$) ($F = 7.46$, $p < .05$).

DISCUSSION

Due to the limited sample sizes of prior work investigating live case usage in marketing classes (Cummins & Johnson, 2021), generalizable insights into best practices and outcomes have yet to be advanced in the literature. This omission is problematic in that one professor's experience with live cases in his or her marketing course may or may not extend across contexts. For example, a professor may have an exceptionally positive experience using a B2B firm in their live case and advocate such a practice for other marketing educators. Our findings provide definitive answers to questions such as these (better to select B2C versus B2B). This section outlines key findings from our sample of live case experts and is also represented in Figure 1.

Figure 1: Pathway to Live-Case Success



There is recent interest in marketing course live case pedagogy with two papers of note published in 2021 (Shanahan, Palmer, Salas, 2021; Tofighi, 2021). The paper by Shanahan, Palmer, Salas (2021) offers a suprastructure for using community-based projects (CPB) in graduate courses in one department refined over a decade. The suprastructure includes 10 steps: six fall within the design phase, and one step each within the phases of conduct, feedback, evaluate, and value-harvesting. Importantly, seven of these ten steps are assigned to the centralized role of “faculty administrator,” which the suprastructure requires to realize multiple observed benefits including decreasing faculty time investment and project discontinuance and increasing outcome project quality.

In comparison to the CBP suprastructure, this paper’s findings are developed across undergraduate and graduate courses from numerous universities and departments and are thus more broadly generalizable. Additionally, this paper’s findings are not reliant on an institution to create or maintain a centralized live-case czar to facilitate the process. Instead, our findings are applicable to any instructor interested in creating educational value through live cases, but without institutionally dedicated strategic resources allocated to the project. This paper’s findings aid the lone instructor on how to efficiently design and operationalize a live case so that a support staff is not necessary and the lack of one is not a barrier to utilize the pedagogical approach. By providing the most and least common marketing courses for live case utilization, this paper is the first to aid the successful implementation or growth of live cases for a given instructor or institution regardless of administrative support.

The paper by Tofighi (2021) provides a combination of a review of selected client-based project articles and the author’s own experience comparing two sections of a marketing research course with, and without a client-

based project. As with much of the literature on live projects, this author offers advice based on her own, and others’ personal experience with the approach across a handful of classes. As Cummins and Johnson (2021) note, “Research on live case usage in marketing has largely focused on small-scale studies and observations by faculty using live cases and problem-based curriculums,” (page 2) and this paper follows in this tradition.

Tofighi (2021) does take a first step toward offering aggregated advice on live case operationalization by including a table of tips and tools for live projects sourced from 11 other observational articles. Importantly, and noted in this paper and by Cummins and Johnson (2021), many papers offering live case advice based on the authors’ own live case experience directly contradict one another. For example, authors disagree about the amount of the amount of time ideally spent on the project, the timing of the project within the course, the amount of information provided to students, how large group briefings with the partner should be, and grading, to name a few. This reality further highlights the need for a more generalizable sample such as the one this paper employs. This paper’s implementation advice (Figure 1) draws from a large, international sample instead of small (typically less than 3 sections by the same faculty) individual opinions and is thus of value to all current or would be live-case faculty practitioners.

Tofighi (2021, Table 5) offers a listing of possible live-case project topics across a variety of marketing courses, but this paper is the first to estimate the distribution of live cases in marketing classes. Our findings show the most and least prevalent marketing courses for live case usage and we provide the rationale for this distribution. Such insight is important in guiding the behavior of first-time live case adopters

and helping ensure the live case endeavor is a good fit for the course and material.

One of the key constraints for many professors in adopting live cases for their marketing courses is finding appropriate companies with whom to work (e.g., Laukkanen et al., 2013). Finding the right company is critical for the professor both in maximizing their project efficiency and outcomes for students. At the end of our survey, we included an open-ended text area for respondents to provide additional insights. A marketing professor discussed how important proper company selection is in the process:

I find it really very useful - to me and to the students. Generally the companies like it too. But you need to find the right company with the problem that fits and at the right time. They also need to invest in it... It's about the right company at the right time and that can be difficult to achieve.

Our findings can help marketing professors in their ability to source appropriate companies for inclusion in live cases by directing them to a prioritized listing of opportunities. Those new to live cases may feel cold-calling or brainstorming with the class is a reasonable way to find a partner business, but the community of live case scholars advise against these approaches and instead, offer four preferable (and easier) means of finding a live case partner. This new insight both validates some authors' experience and provides a more comprehensive assessment of the efficacy of the various literature-suggested sourcing options available to marketing professors.

Next, we also provide guidance regarding the most important considerations in successfully operationalizing live cases in marketing classes. As noted, opinions abound about the critical success factors in live case usage. As live cases are considered time-intensive, it is important to point adoptees to the areas where the payoff for faculty attention is highest. This paper's top four operational priorities both validate some past research noting the importance of these concerns, and advances the literature by outlining which of the many discussed in the literature should be prioritized.

Two of the top three categories identified by respondents are setting expectations – with students and with companies. For students, a professor noted that they at times failed to possess the motivation and interest requisite to successfully complete the live case:

Students claim that they would like to have more real life experiences. However, when it comes to putting the work into a live case, they seem unmotivated and disinterested.

With this understanding, professors can clearly indicate to students the level of work required to complete the case and avoid issues later in the semester. For companies, respondents were equally adamant about setting expectations for optimal outcomes. Two professors noted:

I think live cases are fantastic in upper level courses as long as you set the expectations for the client at the very beginning.

A big challenge is managing the expectations of the host company - I have to keep emphasizing that these are students in an intro marketing course so the expectations need to be realistic.

Both professors highlight the importance of expectation setting with the involved company. Satisfaction is a simple equation of expectation equaling student deliverables. Proactively adjusting expectation levels can increase satisfaction and prevent issues between faculty and the company members. Our findings also provide insight into elements faculty may wish to *not* incorporate. For example, providing students financial incentives for working on the live case was the least important element and faculty may wish to forgo spending funds here.

Next, despite extant literature extolling the benefits of live case usage in marketing classes (Popovich & Brooks-Hurst, 2019; Rhee, 2018; Vinuales & Harris, 2017) there are certainly drawbacks that faculty should consider. Our results show the promises and pitfalls of using this pedagogical technique. On the downside, live cases require more faculty time in contrast to teaching the same course without a live case component. As one professor noted “they are a lot of extra work for me,” and another says “it takes significantly more time and effort to prepare and execute successfully.” Our results support these assertions, showing live cases result in significantly higher levels of time spent teaching the class and answering student questions. Existing work does offer samples of teaching materials such as rubrics (Tofghi, 2021) or, if implementing across a departmental curriculum, an organizational suprastructure (Shanahan, Palmer and Salas 2021) that may offer means of reducing this extra workload.

However, there are substantial benefits to be considered, potentially compensating for these drawbacks. Respondents believe that key student outcomes such as overall learning and job opportunities are enhanced by using live cases. One professor stated: “Client work is highly valued by our students” and another shares “Live cases are the best pedagogical tool for helping students learn...” Furthermore, the professor obtains both higher intrinsic (e.g., satisfaction with teaching) and extrinsic (e.g., positive evaluations) outcomes for their efforts in using live cases.

Last, pedagogical techniques and outcomes are impacted by contextual factors such as country and type of institution (Merryfield, 1998; Hwang, Kessler, and Francesco, 2004; Berger and Milem, 2000). Our research shows that overall, these factors have little influence on live case sourcing, operationalization, and outcomes, as only four of the 54 relationships tested were significant. However, the differences obtained provide an interesting contribution to the literature. Providing students financial incentives (i.e., live case prizes) is less important in teaching- versus research-oriented schools, advisory boards and current students are viewed as more suitable live-case sources in North America, and live cases impact teaching evaluations to a greater extent in the rest of the world than in North

America. This paper is the first to explore differences in live case operationalization preferences based on the institution's global location and research-level. Future research could look to explore differences in learning outcomes and approaches in different university settings or locations.

CONCLUSION

This paper both validates and adds to the live case literature in marketing using a large, international sample of faculty. The results are the most generalizable roadmap to successful live case implementation and operationalization across the marketing curriculum to date. The results offer clear

guidance on: 1) which classes to implement live cases in; 2) which company sourcing options are most efficacious; 3) which operational concerns should be a faculty's top priority; 4) the most common perceived outcomes for faculty and students; and 5) potential differences in live case operationalization preferences based on the institutions' global location and research-level.

As faculty, we believe in the power of live cases but also have suffered from doubts about their utilization in our classes. We hope this work aids beginning and established faculty, building confidence in the value and feasibility of live cases, and providing specific relevant guidance on how to better implement this learning pedagogy.

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