

**TAPPING THE BENEFITS OF THE LIVING
CASE METHODOLOGY: A CASE STUDY**

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ABSTRACT

The traditional case methodology has been used effectively in business education since 1921. Although this method of instruction promotes critical thinking, problem solving and communication skills, there are inherent disadvantages associated with it. In an attempt to address these disadvantages, the researchers utilized the living case methodology in a capstone senior strategy course. In the living case environment, students become active participants in the case. They interact with the decision makers of the company to gather the data, analyze it and determine the relevancy of the data in the decision making process. The concluding comments of the business owner as well as those of the instructor add insight to the advantages of the living case methodology as an instructional tool.

INTRODUCTION

Over the past decade, the emphasis in higher education has changed from professor-centered learning to active student involvement and participation in the educational process with the goal of graduating students who possess superior communication, critical thinking and problem solving skills. In addition, calls continue to emanate from legislators, governing boards and business advisory groups for research relevancy. The application of case methodology to the learning process has been used successfully to address these goals and concerns. In fact, McEwen (1994) found that the use of case studies ranks as the classroom method considered most effective for developing critical thinking skills.

Using cases to enhance the learning process has a long history in the academic community which can be traced to the medical and legal areas. Today, however, cases are being used very effectively over a wide range of disciplines from physical education and engineering to psychology and business.

Case teaching has enjoyed a successful history of enhancing education in the business disciplines. In 1921, the Harvard School of Business introduced the case method of instruction for business classes based on the documented learning successes that had been achieved by having students analyze actual business situations (McNair & Hersum, 1954). Most business schools now use cases in their capstone courses in areas such as management,

marketing and finance. These disciplines have relied on cases as a teaching mechanism to refine critical thinking, communication and problem solving skills in "real world" situations and to draw previously acquired concepts into a dynamic learning experience. The use of cases to illustrate specific and integrative concepts is becoming more popular and can be found in courses throughout the business school curriculum, even in entry level courses.

WHAT IS A CASE?

In general, a case is a written, descriptive history of a particular situation. Specifically, it is a written account of an event as it actually occurred with the key players in place. A case "commonly involves a decision or a problem. It is normally written from the viewpoint of the decision maker involved and allows the student to step figuratively into the shoes of the decision maker. The basis of each case is the fundamental fact that an actual person truly faced the situation described" (Erskine & Leenders, 1989:10).

The content of the case varies with its educational purpose. A case may be short or long; it can cover a broad range of information or it can be more in-depth and specific. In business education, the traditional case is a teaching document that has been researched and written for classroom use. Classically defined by Gregg (1940):

... it 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 (p.6).

TRADITIONAL CASE METHODOLOGY

The primary purpose of the case method is to bring some reality into the classroom by providing students with real world problems that promote in-depth analysis and discussion. "The ultimate goal of the case method is to train students to make effective management decisions by recreating, as closely as possible in a classroom setting, the reality of organizational situations" (Little, 1993:27). In doing this, students gain both professional knowledge and problem-solving skills.

Traditional case methodology provides an arena for students to test their critical thinking and problem solving skills. It allows them to develop action plans - applying their knowledge and experience to formulate alternatives and to make decisions based on these alternatives. The classroom setting provides a risk-free environment where students can become involved in case analyses and have the opportunity to make mistakes and learn from them. Intrinsic in the case methodology is the idea that there is no single correct answer. The students analyze the facts presented in the case, determine the different possible courses of action the decision maker may select, choose an alternative based on this analysis, and defend their selection.

Advantages of Traditional Case Methodology

Many additional advantages have been attributed to the use of the case method in the classroom (Graham & Cline, 1980; Andrews & Noel, 1986; Little, 1993).

- Cases enhance the educational value of instruction by allowing theory and/or research to be applied to a decision. Theory becomes easier to understand and more concrete.

- Students are more likely to remember concepts when they are applied to real world situations - course concepts become internalized.
- Students' experiences are broadened. They get a chance to see different points of view through various resolutions to the case.
- The case method improves students communication skills - both verbal and written.
- Students are actively involved in the learning process through questioning, probing and responding.
- Students usually find the case method of instruction more interesting and, therefore, more motivating.
- Using cases increases the student's ability to develop ideas.

Disadvantages of the Traditional Case Methodology

In spite of its many advantages, the traditional written case is seen to have some shortcomings (Andrews & Noel, 1986; Turner & Kumar, 1991; Kreck 1992).

- Decision making in the real world is filled with real time complexities and inconsistencies which cannot be duplicated in the written case.
- The written case lacks immediacy since it is the history of a past situation and there is no opportunity to create an environment of dynamic feedback where students can learn from analysis and implementation mistakes.
- The information is presented in a single medium - print. Real situations use a variety of information sources. There is a vast difference between actually experiencing something and only reading about it.
- The written linear case description constrains some of the potential inherent in the case method of instruction by following a time or story line where the student may be led through the material to conclusions which have been shaped by the facts presented.
- The traditional method is relatively weak in its efforts to teach business problem identification and solution.

The living case addresses some of the disadvantages of the traditional case method while providing an opportunity for both instructors and students to benefit from the many advantages of this methodology.

WHAT IS A LIVING CASE?

Living cases can best be described as dynamic, "real-time" business decision making opportunities. Generally speaking this teaching method includes both students and a business principal working together to identify current managerial issues and/or problems. Once these issues and/or problems have been identified, students are faced with the challenge of developing and presenting recommendations that can withstand the scrutiny of the business principal. The idea of bringing business people into the classroom to allow students to deal with specific problems can be traced to the pioneering efforts of Dean Edwin F. Gay at Harvard University in 1912.

At the first meeting with the class, [the businessman] explained his problem to the students and answered such questions as they raised, provided the questions could be answered. At the next meeting of the class two days later, each student handed in a written report embodying his analysis of the problem and his recommended solution. At the third meeting of the week, the businessman discussed these reports with the class (McNair & Hersum, 1954: 26-27).

In the living case environment, students have the opportunity to become active participants in the case. The living case is an example of the learning by discovery methodology. Teaching literature has shown this technique to be effective in domains where inference and induction skills are important (Eysenck, 1984; Carroll, Paine & Ivancevich, 1972). Turner and Kumar (1991) state, "In this method, students are allowed to gather their own data, form hypotheses about problems and solutions, and then accumulate additional confirming or refuting information" (p. 353).

The living case addresses some of the disadvantages of the traditional case methodology. It allows the students to ask questions of the decision makers - to feel the uncertainty and/or risks associated with a situation. In addition, it gives them an opportunity to sift through the original data which may enable them to identify significant trends or the climate of the organization (Andrews & Noel, 1986).

Living cases also allow students to hone their information gathering skills. Students are placed in a learning environment where they can experience the complexity, inconsistencies and chaos of real world situations. They receive timely feedback and must then determine which path to follow next to reach their goals. The information is presented in a non-linear, undirected format - real-time. When students enter the realm of the living case, they move away from the artificially imposed constraints of traditional cases and into a dynamic decision making world.

LIVING CASE METHODOLOGY

Kreck (1992) stated that "[a]sking questions that probe specific issues was the secret to operational problem solving" (p. 70). Using the traditional case methodology, students cannot go to the company and ask questions which could bring to light many things which influence decision-making. Kreck's solution to the problem is the use of "live" or "real" cases. A company calls with an undesirable symptom, e.g., a significant variance from a budgeted norm. A pair of students travel to the business location and are given three days to present their recommendations to management. He stated, "One either asks the appropriate or critical questions, defined as the ones belonging to this particular situation, or one simply misses a part of the investigation and makes incorrect or less-than-complete recommendations" (p. 72).

Andrews and Noel (1986) reported on a two-day segment of a four-week management training course sponsored by General Electric which used the living case methodology. "Instead of studying something that happened in the past, participants work on a major, unresolved challenge facing the company" (p. 28). The case involved a decision on introducing a new medical technology and the effects it would have on the company. Participants traveled to the Medical Center where they examined data and documents and interviewed executives. They then developed a marketing strategy, presented their recommendations, gained feedback and made revisions to their proposals. This involvement approach provided participants an opportunity to experience the risks, ambiguities and pressures facing the decision maker.

IMPLEMENTING THE LIVING CASE METHODOLOGY

When using the living case approach, a solid conceptual foundation from textbook materials and a combination of lectures spiced with a number of current and relevant examples to highlight the textbook concepts was required. In addition, the input and counsel of other business professionals such as bankers, lawyers, Small Business Development Center (SBDC) personnel and certified public accountants (CPAs) who served as guest speakers and student resource contacts were solicited.

To implement a living case learning environment, instructors must prepare students to keep one foot in two different worlds. First, students must be prepared academically. Second, they must be prepared to deal with business people not as students but as professionals.

Venturing into the world of the living case, the basic components of the case teaching method were kept in mind. The case was:

- Related to actual administrative situations
- Focused on problems
- Designed to place students in analytical, decision making, and evaluative situations
- Based upon data sources and viewpoints essentially from management
- Intended to have the student identify with the organization (Ling, 1997: 38)

Experimental Design

The authors who are both teachers and avid case writers, decided to experiment with an expanded course using the living case in an undergraduate capstone Strategic Management class. This class, consisting of 12 students, met for six hours, once a week, focusing on one company throughout the term. This type of course or any course that is taught using the case approach presents an opportunity to actively involve students of varying levels of academic achievement in the learning process.

Even before students entered the classroom, the stage was set to teach with the living case approach. Through previous contacts, several company presidents and business owners were contacted and encouraged to allow their companies to be the focus of our classroom study. The authors explained the case method and provided copies of cases written about other small businesses; students described the possible time commitments and addressed the issues of confidentiality. Since the entire class and not just a few team members often need access to financial information, the issue of confidentiality can be a major stumbling block when working with privately held companies. This barrier can be overcome when owners are assured that confidentiality statements will be signed by all participants. Based on our experiences, the task of finding willing participants who could commit their organizations to these constraints proved to be difficult yet possible.

Don Baker, President of Baker Distributing Company, agreed to work with the class. Baker Distributing Company was engaged in the wholesale distribution of gourmet foods. The company is a very small business (less than \$1 million in annual revenues), dedicated to locating producers of gourmet and specialty food items and then distributing these items to gift shops and grocery stores in a small geographic region.

Mr. Baker was interested in subjecting his company to the investigation incumbent with the living case process, since he had reached a critical point in the growth of his company. He believed that the living case method would provide him with several benefits. First, it would force him to think about the future and articulate his plans. Second, he would have the "consulting services" of both the professor and senior business administration students provided at no charge. Third, he stated that working with students would force him to do more research about the industry to be able to answer their questions. The format to which he agreed became part of a free-wheeling process of discussion, research, and discovery which captured the educational benefits often attributed to discovery learning.

The initial class meetings included several very structured lectures to enhance textbook materials. Students were encouraged to outline the chapters. As a "reward" for outlining chapters, they were allowed to use their notes during any discussions with company representatives or speakers who visited the class. In addition, students were permitted to use the notes to answer questions on the objective portion of their exams. However, notes could not be used during the essay portion of their exams.

During the initial class meetings, students were placed in several short (ten to fifteen minutes) group problem solving and discussion activities. The purpose of these activities was to provide students with opportunities to become acquainted with one another and comfortable with freely expressing their ideas and opinions with others.

Applying the Living Case

Mr. Baker agreed to meet with the class at least once a week and provide them with any information they needed to perform a strategic analysis. Although he agreed to meet with the students once a week for ten weeks, the students chose to meet with him in class on only six occasions. Sometimes these meetings were long (three hours) and sometimes they were fairly short (about 30 minutes). In fact, after the first two meetings, students decided that they wanted to skip one meeting so that they could do more research and prepare to make better use of Mr. Baker's time.

Students used this time to divide several research tasks they had identified as important to understanding his business. Some of these tasks included visiting his warehouse, talking with key customers and suppliers, and riding along on delivery routes. To avoid being a nuisance, the students divided these tasks and coordinated their schedules for the convenience of everyone involved.

The class decided that, for the sake of efficiency and professionalism, they would elect a "scribe" or secretary to keep minutes of the meetings and collect notes from the individual students describing their observations and findings. Although this position was not initially built into the class plan, it proved to be an invaluable service. It is interesting to note that a student with extraordinary keyboarding skills volunteered for this task and kept notes on a laptop, printing these out at the end of each class and providing working copies for everyone.

The length of classroom meetings was directly related to the amount of research the students had conducted before class and to the subject area(s) being discussed. Students were always required to prepare some questions before the meetings, and these questions were forwarded to Mr. Baker before hand. This process of encouraging thoughtful communication between the students and Mr. Baker was facilitated by the use of e-mail through the instructor. In addition to the faculty member serving as the gatekeeper for questions, this process also allowed the faculty member to assist students in refining their questions to obtain relevant information.

Over the weeks, the class format stabilized. After the prearranged questions had been answered, the classroom turned into a learning laboratory. Mr. Baker asked questions that piggybacked on previous conversations and sought student input into problems with which he was dealing. These ranged from ways to dispose of excess inventory to suggestions on upgrading computer hardware and software.

It should be noted that Mr. Baker was not asked for the company financial statements until the third meeting. Even though everyone in the class had signed confidentiality agreements, the delicate subject of obtaining detailed financial statements was not approached until a trusting

relationship had been established. Having access to financial statements allowed students to conduct ratio analyses, prepare proformas, and make relevant industry comparisons. Access to these statements also led the students to request guest speakers (a bank president, an SBDC director, and a CPA) to discuss relevant small business issues and provide input. Mr. Baker agreed to have all these speakers participate with the class as long as the students did not divulge specific financial information.

OWNERS' PERSPECTIVES

In the spirit of continuous improvement, the researchers asked Mr. Baker a series of questions at the conclusion of the case study. The following are excerpts from his responses to the questions.

- *In what way(s) do you feel the students helped you?*
My presentation to the students and their questions gave me an opportunity to assess the business objectives and helped me crystallize my thinking with respect to future plans and action.
- *What problems did you have with the students and/or their questions?*
I saw no problems at all, only individuals interested in probing into the activity of a real live business. Obviously, some students have an idealism that does not fit the practicality of the situation, but that is why we have such projects for them to explore.
- *How could students improve the project?*
A little more on site involvement would be beneficial for students to then form their "own" perspectives of the situation rather than take the shared opinion of a couple who formed an idea.
- *If you were to do it again, what would you do differently?*
I would have the entire class start with a tour of the business on-site with a brief overview and then make an in-depth presentation in the classroom followed by questions and answers. I was unable to attend the scheduled report presentations by students. I believe that it would be highly beneficial to listen to student presentations and have an opportunity to engage in further dialogue concerning the thrust of students' thoughts.
- *What advice would you give students who will be doing this project for the first time?*
I would make every attempt to put students in the shoes of the owner/manager/executive by in-depth participation. I would give them the opportunity to ask themselves "What would I do?" if I were the guy in charge given fiscal constraints of a practical nature and to scope out thoughts and ideas by investigation into the cost of implementation of an idea with a projected return on investment. The biggest problem a business has, every business, is dealing with fiscal constraints and cash flow...[I would] try to bring it to life in the study.
- *What advice would you give a business owner/manager doing this project for the first time?*
Open the doors wide. Encourage questions and provide honest answers. Don't be afraid to air dirty linen...students may give you some options that can solve problems or potential problems. Try to set the stage for mutual trust in order to keep the lines of communication open. Engage with students at every opportunity and definitely have them visit the business site as frequently as possible, as a group or individually.

STUDENT REACTIONS

Students who participated in this process freely shared their thoughts through evaluations conducted during the final class period. Following are highlights of their responses:

- *What did you like most about this project?*
Working with a real company and real people was challenging.
My ideas were seriously considered.
The project helped the class material flow in a logical and meaningful manner.
Having access to professionals in a real world setting; facing an undefined and challenging set of problems.
- *What did you like least about the project?*
It was hard to decide where to start since there was so much information and so many different interrelated issues to consider.
I was uncomfortable making recommendations that could impact the success or failure of a real business and a real person, but this was also a wake-up call as to the reality of making business decisions and the complexities managers face.
I wish we had more time to gain more information and the opportunity to see some of our ideas implemented.
- *If you could make changes for students facing a similar project in the future, what would they be?*
Assign small working groups (committees) to tackle specific tasks and report back to the larger group (board meeting) to discuss the overall project before writing the final paper.
Tell the owner to not share as much information about how his company was dealing with challenges. This way, we could think about what kind of recommendations we will offer before we know what types of things are already being considered.
Start early, take good notes during meetings, and seek as much help as possible from other professors and outside business people.

INSTRUCTORS' COMMENTS

A review of student reactions when viewed in light of the owner's perspectives led to a series of reflections for successful implementation of the living case methodology. From the perspective of all involved parties (business owner, students and instructors), the living case was a resounding success. As this pedagogical process is approached in future classes, instructors should

- Inform company principles that the opportunity to share their stories and key decisions points with others through the publication of a case would be appreciated;
- Create an ongoing relationship that would allow students in subsequent classes to build upon the knowledge created by their peers;
- Secure permission to allow instructors to speak to other organizations about the successes and failures resulting from student recommendations;
- Inform company principles that they may strongly disagree or even, at times, be offended by student questions and/or recommendations - egos need to be checked at the door when you engage in this process;
- Fully prepare undergraduate students through textbook materials, readings, and lectures to effectively participate in this process; and

- Prepare students for the transition from a system that has encouraged and rewarded individual competition for grades to one where the emphasis is on investigative questioning, problem solving and professional interaction.

In this environment, students are faced with meeting professional expectations as well as group expectations, thereby subjecting them to more personal risks. Faculty also face more personal risk as they abandon the traditional, secure teaching methods for their new roles as facilitators in the discovery learning process.

Based on the documented success achieved using the living case methodology with Baker Distributing Company, the authors tested the concept in two subsequent Strategic Management classes. One class, consisting of thirteen students, met two hours daily for five weeks during the summer, working with a regional travel services company. The other class, consisting of twenty-four students, met two hours, twice a week during the regular term, working with a national software development company. Both companies would be classified as small businesses using the Small Business Administration's classification criteria. The successes achieved with Baker Distributing Company were replicated in both of these classes.

SMALL BUSINESS INSTITUTE (SBI™) CASE METHODOLOGY

In many respects, the classroom-oriented living case method draws on the successful Small Business Institute (SBI) program. This program began over 25 years ago as the U.S. Small Business Administration (SBA) and several higher education institutions sought a vehicle to bridge the gap between academic preparation and the entry-level training needs of small businesses. Through the SBI™ program, "Teams of qualified university students, under expert faculty supervision, provide consulting to small business owners and managers, as part of their educational training. . . The emphasis is on practical, realistic, and affordable solutions to problems confronting small businesses"

(See <http://www.cba.uc.edu/cbainfo/sbida/history.htm>).

The goals of the SBI™ case consulting method and the living case are the same in that the emphasis is on the improvement of a small business by applying a thorough analysis using interdisciplinary business knowledge. The process is the same in that students use the decision making model of analysis, looking at the critical success factors of the company, determining the problem(s) the company is experiencing, forming alternative solutions and then making the decision for the most appropriate solution.

But, with the living case method, students do this work in the classroom as a whole with the owner/manager coming to the classroom and meeting with students rather than the students being required to visit the site(s) being investigated. The owner/manager provides the students with answers to their questions. The students are not required to actually go through the papers, books, etc. of the company on the premises. By using a broader classroom setting, many students, and not just selected teams of students, are given the opportunity to become intimately involved in a single case. This classroom setting allows many students to be involved in a single case where the entire class becomes the "team."

The SBI™ approach to helping small businesses is a long-standing program with a proven track record of providing effective consulting services to its clients. The living case methodology allows students who are not able to participate in SBI™ programs to gain some of the same benefits as those who do. The living case is an expanded, inclusive alternative to the SBI™ program with many of the same goals: to promote small business, help owners, etc. The substance is the same; it is the form that is different. The living case format allows institutions that do not have the resources to support an SBI™ program to promote small

business assistance and help owners as well as providing a teaching and learning vehicle for professors and students in a variety of classroom settings.

CONCLUSION

Case analyses and discussions serve as a vehicle to actively integrate students in the teaching/learning process. However, although case analysis can be used effectively as a teaching tool, ". . . students sometimes feel case discussion becomes routine and tiresome, which reduces its value as a learning experience" (Molstad & Levy, 1987-88: 28). One approach that has been suggested to alleviate this problem is the use of a class case study.

Based on the documented successes of this approach and others that actively involve business participants such as the SBI™ team consulting program, the researchers have taken the idea a step further and actually brought the case into class. Bringing the case into the class means more than simply bringing in guest speakers from the company. It requires creating an environment where students can become immersed in the many issues facing an organization, thus placing students in the vicarious roles of managers who have decision making responsibilities. This additional step has resulted in the opportunity to teach a living case.

Through the use of a living case, an environment was created in which students became actively involved in the teaching/learning process. Actively involving students through real-time business experiences is a pedagogical approach that could be used in many different types of courses and appears to be especially well suited for instruction designed to bring to life the issues surrounding the formulation and implementation of business strategies. The living case method can be used in any size class or type of course or institution and does not require additional resources or administrative oversight. In addition, students of all academic levels can be given the chance to experience the learning process provided through consulting opportunities that are typically reserved for the best and brightest students at most institutions.

This approach is designed to create a learning environment charged with excitement and the competitive desire to excel which is an important trait for successful entrepreneurs and small business owners. Peer pressure to prepare and meaningfully participate in class activities was reinforced by the presence of outside business professionals who viewed the undergraduate students as useful resources. The living case should be especially effective with graduate students. One word of caution is in order before closing. Be prepared to become an active participant in the process.

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