

## **STUDYING AND LEARNING FROM CASES**

**(Adapted from Christopher H. Lovelock and Charles B. Weinberg, 1988 and 1991).**

The cases featured in this course are representative of real-world problems that managers in different organizations have to face and resolve. Although designed principally for use in classroom discussions, many of these cases can offer valuable insights to the individual reader. The comments that follow are directed primarily at participants in courses and seminars who have been assigned one or more of these cases to prepare for subsequent class discussion. Unlike methods of instruction that use lectures and textbooks, the case method of instruction does not present students with a body of tried and true knowledge about how to be a successful manager. Instead, it provides an opportunity for students to learn by doing.

As a student, you may find that dealing with cases is very much like working with the actual problems that people encounter in their jobs as managers. In most instances, you'll be identifying and clarifying problems facing the management of a company or non-business organization, analyzing qualitative information and quantitative data, evaluating alternative courses of action, and then making decisions about what strategy to pursue for the future. You may enjoy the process more—and will probably learn more—if you accept the role of an involved participant rather than that of a disinterested observer who has no stake, or interest, in resolving the problems in question.

The goal of case analysis is not to develop a set of “correct” facts but to learn to reason well with available data. Cases mirror the uncertainty of the real-world managerial environment in that the information they present is often imprecise and ambiguous. You may perhaps be frustrated that there is no one right answer or correct solution to any given case. Instead, there may be a number of feasible strategies management might adopt, each with somewhat different implications for the future of the organization, and each involving different trade-offs. In this course, you'll be exposed to a wide range of different management situations within a relatively short time. As a result, the cases presented in this course will collectively provide a much broader exposure to global operations strategy issues than most manager's experience in many years on the job.

### **CASES AND THE REAL WORLD**

Recognizing that managerial problems are not unique to a particular institution (or even to a specific industry) forms a basis for developing a professional approach to management. It's important to recognize that even though case writers try to build realism into their cases, these cases differ from real-world management situations in several important respects. First, the information is prepackaged in written form. By contrast, managers accumulate their information through memoranda, meetings, chance conversations, research studies, observations, news reports, and other externally published materials—and, of course, by rumor.

Second, cases tend to be selective in their reporting because most of them are designed with specific teaching objectives in mind. Each must fit a relatively short class period and focus attention on a defined category of management problem within a given subject area. To provide such a focus—and to keep the length and complexity of the case within reasonable bounds—the writers may need to omit information on problems, data, or personnel that are peripheral to the central issue in the case.

In the real world, management problems are usually dynamic in nature. They call for some immediate action, with future analysis and major decisions being delayed until some later time.

Managers are rarely able to wrap up their problems, put them away, and go on to the next “case.” In contrast, discussing a case in class or writing an analysis of a case is more like examining a snapshot taken at a particular point in time—although sometimes a sequel case provides a sense of continuity and poses the need for future decisions within the same organization.

A third, and final, contrast between case analyses and real-world management is that participants in case discussions and authors of written case reports aren’t responsible for implementing their decisions, nor do they have to live with the consequences. However, this doesn’t mean you can be frivolous when making recommendations. Professors and students are likely to be critical of contributions that aren’t based on careful analysis and interpretation of the facts.

## **PREPARING A CASE**

Just as there is no one right solution to a case, there is also no single correct way of preparing a case. However, the broad guidelines outlined in “Preparing a Case” may help familiarize you with the job of case preparation. With practice, you should be able to establish a working style with which you feel comfortable.

The guidelines on initial analysis and on developing recommendations should also serve you well for preparing written case reports or case-based exams.

First, it’s important to gain a feel for the overall situation by skimming quickly through the case. Ask yourself:

- What sort of organization does the case concern?
- What problems does management appear to be facing?

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### **Preparing a Case: A Brief Outline**

#### **I. Initial fast reading**

- \* No notes
- \* Get a feel for what’s going on
- \* Think about major problems and forces present

#### **II. A second careful reading**

- \* Make notes identifying:
  - Organizational objectives
  - Nature of problem(s)
  - Key facts
  - Key decisions
- \* Evaluate and analyze case data

#### **III. Development of specific issues**

- Identify alternative courses of action to meet objectives
  - Consider implications of each action
  - Provide recommendations, supported by analysis
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An initial fast reading, without making notes or underlining, should provide a sense for what is going on and what information is being presented for analysis. Then you'll be ready to make a very careful second reading of the case. This time, seek to identify key facts so that you can develop a situation analysis and clarify the nature of the problems facing management. As you go along, try to make notes in response to such questions as:

- What decisions need to be made, and who will be responsible for making them?
- What are the objectives of the organization itself and of each of the key players in the case? Are these objectives compatible? If not, can the problem be reconciled, or will it be necessary to redefine the objectives?
- What resources and constraints are present that may help or hinder attempts by the organization to meet its objectives?

You should make a particular effort to establish the significance of any quantitative data presented in the text of the case or, more often, in the exhibits. See if new insights may be gained by combining and manipulating data presented in different parts of the case. But don't accept the data blindly. In the cases, as in real life, not all information is equally reliable or equally relevant. On the other hand, case writers won't deliberately misrepresent data or facts to trick you.

### **Developing courses of action on specific issues**

At this point in the analysis, you should be in a position to summarize your evaluation of the situation and to develop some recommendations for management. First, identify the alternative courses of action that the organization might have. Next, consider the implications of each alternative, including possible undesirable outcomes, such as provoking responses from stronger competitors. Ask yourself how short-term tactics fit with longer-term strategies. Relate each alternative to the objectives of the organization (as defined or implied in the case, or as redefined by you). Then, develop a set of recommendations for future action, making sure that these recommendations are supported by your analysis of the case data. Specific issues to be considered for each case are provided under the appropriate class session in the "schedule of sessions" section in the memorandum of understanding.

Your recommendations won't be complete unless you give some thought to how the proposed strategy should be implemented:

- \* What resources—human, financial, or other—will be required?
- \* Who should be responsible for implementation?
- \* What time frame should be established for the various actions proposed?
- \* How should subsequent performance be measured?

## **CLASS DISCUSSION**

Courses taught by the case method emphasize inductive learning, with conceptual frameworks and strategic guidelines developed from the analysis of a variety of real-world situations. This approach contrasts sharply with the deductive approach to learning used in lectures where the concepts are presented first and must then be applied to actual situations.

### **Role of the Professor**

In class, you may find that the role played by a professor using the case method usually differs significantly from that of a lecturer. The professor's role in case discussions is often similar to that of a moderator—calling on students, guiding the discussion, asking questions, and periodically synthesizing previous comments. Teaching styles vary, of course, from one case professor to another. Many professors like to begin the class by asking a student to “lay out” the case, which may involve your being asked to identify key problems and opportunities, to present some preliminary data analysis, and perhaps to outline a possible plan of action.

Some professors, as in the current course, assign study questions in advance to help students with their case preparation; but others feel it is more realistic (albeit more demanding) to let students define for themselves how they should approach each new case.

### **Responsibilities of Participants**

Instead of being a passive note-taker, as in lecture classes, you'll be expected to become an active participant in class discussions. Indeed, it's essential that you participate, for if nobody participates, there can be no discussion! If you never join in the debate, you'll be denying other participants the insights that you may have to offer. Moreover, there's significant learning involved in presenting your own analysis and recommendations and debating them with your classmates—who may hold differing views or else seek to build on your presentation. But don't be so eager to participate that you ignore what others have to say. Learning to be a good listener is also an important element in developing managerial skills.

Occasionally, it may happen that you are personally familiar with the organization depicted in a case. Perhaps you are privy to additional information not contained in the case, or perhaps you know what has happened since the time of the case decision point. If so, keep this information to yourself unless, and until, the professor requests it. (This advice also holds true for written reports and case exams.) There are no prizes for 20/20 hindsight; injecting extra information that nobody else has is more likely to spoil a class discussion than to enhance it.

Learning comes through discussion and controversy. In the case method of instruction, participants must assume responsibility not only for their own learning but also for that of others in the class. Thus, it's important for students to be well prepared, willing to commit themselves to a well reasoned set of analyses and recommendations, and receptive to constructive criticism. Students unwilling to accept this challenge are likely to find the case method aimless and confusing. On the other hand, if you do accept it, you'll experience in the classroom that sense of excitement, challenge, and even, exasperation that comes with being a manager in the real-world situation.