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Learning by the Case Method

The case method is not only the most relevant and practical way to learn managerial skills, it's exciting and fun. But, it can also be very confusing if you don't know much about it. This brief note is designed to remove the confusion by explaining how the case method works and then to suggest how you can get the most out of it.

Simply stated, the case method calls for discussion of *real-life situations* that business executives have faced. Casewriters, as good reporters, have written up these situations to present you with the information available to the executives involved. As you review their cases you will put yourself in the shoes of the managers, analyze the situation, decide what you would do, and come to class prepared to present and support your conclusions.

How Cases Help You Learn

Cases will help you sharpen your analytical skills, since you must produce quantitative and qualitative evidence to support your recommendations. In case discussions, instructors will challenge you and your fellow participants to defend your arguments and analyses. You will hone both your problem-solving and your ability to think and reason rigorously.

Because case studies cut across a range of organizations and situations, they provide you with an exposure far greater than you are likely to experience in your day-to-day routine. They also permit you to build knowledge in various management subjects by dealing selectively and intensively with problems in each field. You will quickly recognize that the problems you face as a manager are not unique to one organization or industry. From this you will develop a more professional sense of management.

In class discussions, participants bring to bear their expertise, experience, observations, analyses, and rules of thumb. What each class member brings to identifying the central problems in a case, analyzing them, and proposing solutions is as important as the content of the case itself. The lessons of experience are tested as different participants present and defend their analyses, each based on different experiences and attitudes gained by working in different jobs. Your classmates and you will differ significantly on what's important and how to deal with common problems, interdependencies, organizational needs, and the impact of decisions in one sector of an organization upon other sectors.

Professor John S. Hammond prepared this note building on earlier notes by professors E. Raymond Corey and Martin Marshall of the Harvard Business School.

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Perhaps the most important benefit of using cases is that they help managers learn how to determine what the real problem[1] is and to ask the right questions. An able business leader once commented: "Ninety per cent of the task of a top manager is to ask useful questions. Answers are relatively easy to find, but asking good questions is the most critical skill." The *discussion questions* suggested for each case are just to help you focus on certain aspects of the case. In presenting them the faculty is not preempting your task of identifying the problems in the case. You still must ask yourself: "What *really* are the problems which this manager has to resolve?" Too often, in real-life situations managers manipulate facts and figures without the problems having been specifically defined.

A final benefit that the faculty seeks is to reinvigorate the sense of fun and excitement that comes with being a manager. You will sense once again that being a manager is a great challenge—intellectually, politically, and socially.

In short, the case method is really a focused form of learning by doing.

How to Prepare a Case

The use of the case method calls first for you, working individually, to carefully read and to think about each case (typically about two hours of preparation time for each case are provided in the schedule). No single way to prepare a case works for everyone. However, here are some general guidelines that you can adapt to create a method that works best for you.

1. *Read the first few paragraphs, then go through the case almost as fast as you can turn the pages,* asking yourself, "What, broadly, is the case about, and what types of information am I being given to analyze?" You will find that the text description at the beginning is almost always followed by a series of exhibits that contain added quantitative and qualitative information for your analysis.

2. *Read the case very carefully, underlining key facts and writing marginal notes as you go.* Then ask yourself: "What are the basic problems these managers have to resolve?" Try hard to put yourself in the position of the managers in the case. Make the managers' problems *your* problems.

3. *Note the key problems or issues* on a pad of paper. Then go through the case again.

4. *Sort out the relevant considerations for each problem area.*

5. *Do appropriate qualitative and quantitative analysis.*

6. *Develop a set of recommendations, supported by your analysis* of the case data.

Until now, your best results will come if you have worked by yourself. However, if you have time before class, it is useful to engage in informal discussions with some of your fellow participants about the cases. This can be done at social hours, meals, or planned get-togethers. In fact, some people like to form discussion groups to conduct such discussions. (Discussion groups are important enough to be mandatory scheduled activities in many executive programs.) The purpose of these discussions is

[1] See, for example, Hammond, Keeney and Raiffa, *Smart Choices, A Practical Guide to Making Better Decisions*, Harvard Business School Press, 1999, especially Chapter 2.

not to develop a consensus of a "group" position; it is to help members refine, adjust and amplify their own thinking.

To maximize the benefit to you of this group process it is extremely important not to skip or skimp on the individual preparation beforehand. If you take the easy way out and just familiarize yourself with the facts, saving all preparation to be done with your discussion group, you will deprive yourself of the opportunity to practice the very skills that you wanted to obtain when you enrolled.

What Happens in Class

In class, your instructor usually will let members discuss whatever aspects of the case they wish. The faculty's job is to facilitate the discussion, to pose questions, prod, draw out people's reasoning, play the devil's advocate and highlight issues. A healthy debate and discussion will ensue. You will benefit most if you participate actively in that debate. Sometimes faculty will present conceptual frameworks and invite you to use them to organize your thoughts to create new insights. Other times they'll generalize, summarize, or tell about relevant situations in other companies.

They'll try to keep the discussion on track and moving forward. To do this, they'll usually organize and document the on-going debate on the blackboard. While faculty may suggest the pros and cons of a particular action, only occasionally will they give their own views. Their job isn't to help the class reach a consensus; in fact, often the thought process will be far more important than the conclusions. Near the end, instructors will summarize the discussion and draw out the useful lessons and observations which are inherent in the case situation and which emerge from the case discussion.

A typical request at the end of a discussion is "What's the answer?" The case method of learning does not provide *the* answer. Rather, various participants in the discussion will have developed and supported *several* viable "answers".

> Business is not, at least not yet, an exact science. There is no single, demonstrably right answer to a business problem. For the student or business person it cannot be a matter of peeking in the back of a book to see if he or she has arrived at the right solution. In every business situation, there is always a reasonable possibility that the best answer has not yet been found—even by teachers.[2]

Sometimes when the faculty knows the outcome of the case they'll share it with you at the end of the discussion. While it is fascinating to learn how things actually turned out, the outcome isn't the answer either. It is simply one more answer, which you may feel is better or worse than yours. What is important is that *you* know what you would do in that situation and, most importantly, *why*, and that your skill at arriving at such conclusions has been enhanced.

You can't acquire judgment and skill simply by reading books or listening to lectures any more than you can become a great swimmer just by reading a book on swimming. While the knowledge obtained from books and lectures can be valuable, the real gains come from practice at analyzing real business situations.

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[2]Charles I. Gragg, *Because Wisdom Can't Be Told,* HBS Case No. 9–451–005.

How You Can Get the Most Out of the Process

There are a number of things you can do to get the most out of the process:

1. *Prepare*. Not only is a thorough, individual preparation of each case a great learning experience, it is the key to being an active participant in the case discussion.

2. *Discuss the cases with others beforehand*. As mentioned earlier, this will refine your reasoning. It's not cheating; it's encouraged. However, you'll be cheating yourself if you don't prepare thoroughly before such discussions.

3. *Participate*. In class, actively express your views and challenge others. Learning by talking may seem contrary to how you learned in other settings. You may have been urged to be silent and learn from others, especially the faculty. In case discussions, when you express your views to others you commit which, in turn, gets you involved. This is exactly the same as betting at the racetrack; your bet is a commitment which gets you involved in the race. Talking forces you to decide; you can no longer hedge.

4. *Share your related experience*. During class if you are aware of a situation that relates to the topic being discussed and it would enrich the discussion, tell about it. So-called war stories heighten the relevance of the topic.

5. *Constantly relate the topic and case at hand to your business* no matter how remote the connection seems at first. Don't tune out because of a possible disconnect. You *can* learn *a lot* about marketing insurance by studying a case on marketing razor blades and vice versa. It's not whether it relates, but how.

6. *Actively apply what you are learning to your own, specific management situations, past and future*. That will greatly heighten relevance. Even better is to pick a situation that you know you will face in the future where you could productively use some good ideas. For example, how can I grow my business? Make note of each good idea from the discussion that helps. Not only will these ideas improve the outcome of the situation, they will stick in your mind forever, because they were learned in the context of something important to you.

7. *Note what clicks*. Different people with different backgrounds, experiences, skills and styles will take different things out of the discussions. Your notes will appropriately be quite different from your neighbors'.

8. *Mix it up*. Use the discussion as an opportunity to discover intriguing people with different points of view. Get to know them outside of class and continue your learning there.

9. *Try to better understand and enhance your own management style.* By hearing so many other approaches to a given situation you will be exposed to many styles and thereby understand your own. This understanding will put you in a better position to improve it.

You will learn from rigorous discussion and controversy. Each member of the class—and the instructor—assumes a responsibility for preparing the case and for contributing ideas to the case discussion. The rewards for these responsibilities are a series of highly exciting, practically oriented educational experiences that bring out a wide range of topics and viewpoints.