



# CASE STUDY LEARNING: A TOOL FOR TEACHING CRITICAL THINKING

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# Agenda

- My philosophy towards thinking
- Approach to integrating CT within a course
- Case study learning
- Written Case Analysis Method
- Discussion and lessons learned
- Q & A



# THINKING BIG

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CRITICAL  
THINKING

*A process of moving away from ‘the search of the simple’ to solve complex, interconnected problems of our time.*

SYSTEMS  
THINKING

COMPLEXITY  
THINKING

*A process by which we view a set of interrelated parts as a ‘whole rather than seeing them as unrelated components.*

# Integration of critical thinking

Syllabus  
& Assessment

CT Module  
(explicit teaching on CT)

5 Case  
Studies



# Integration of critical thinking

- Explicit and transparent
  - *CT2 statement*
  - *CT defined in the syllabus*
  - *Course objectives reflecting higher order thinking*
  - *Not a “one off topic” of the course – but the focus of the course*
- Lecture, examples, and practice
  - *Introduction to CT lecture (1 week)*
  - *Reading for background context*
  - *Handouts*
    - How to Read Critically
    - A template for problem solving – questions to ask
    - Elements of thought





# Example Material



## HOW TO READ CRITICALLY

The key to success in college, in all courses, in all disciplines, is critical reading. Critical reading is concentrated, active, engaged reading. At its core, critical reading involves *annotating* a text: underlining and writing key words in the margins. Many students do not know how to read critically because they have never been allowed to write in their books. In college, you own the books, so you can finally begin to learn this vital skill. You might worry that you are ruining the book, especially for sale back to the bookstore. However, marking in the book does not decrease its value, and the bookstore doesn't really give you much money for a used book anyway. Think economically: you are paying a lot to get an education. A real education involves critical reading. If you are not reading critically, annotating all your texts, you are not getting a real education. Would you rather get a few dollars back at the end of the semester, or know that you got the full value of your dollar from your reading? Critical reading is difficult but rewarding. Here are a few steps to help you:

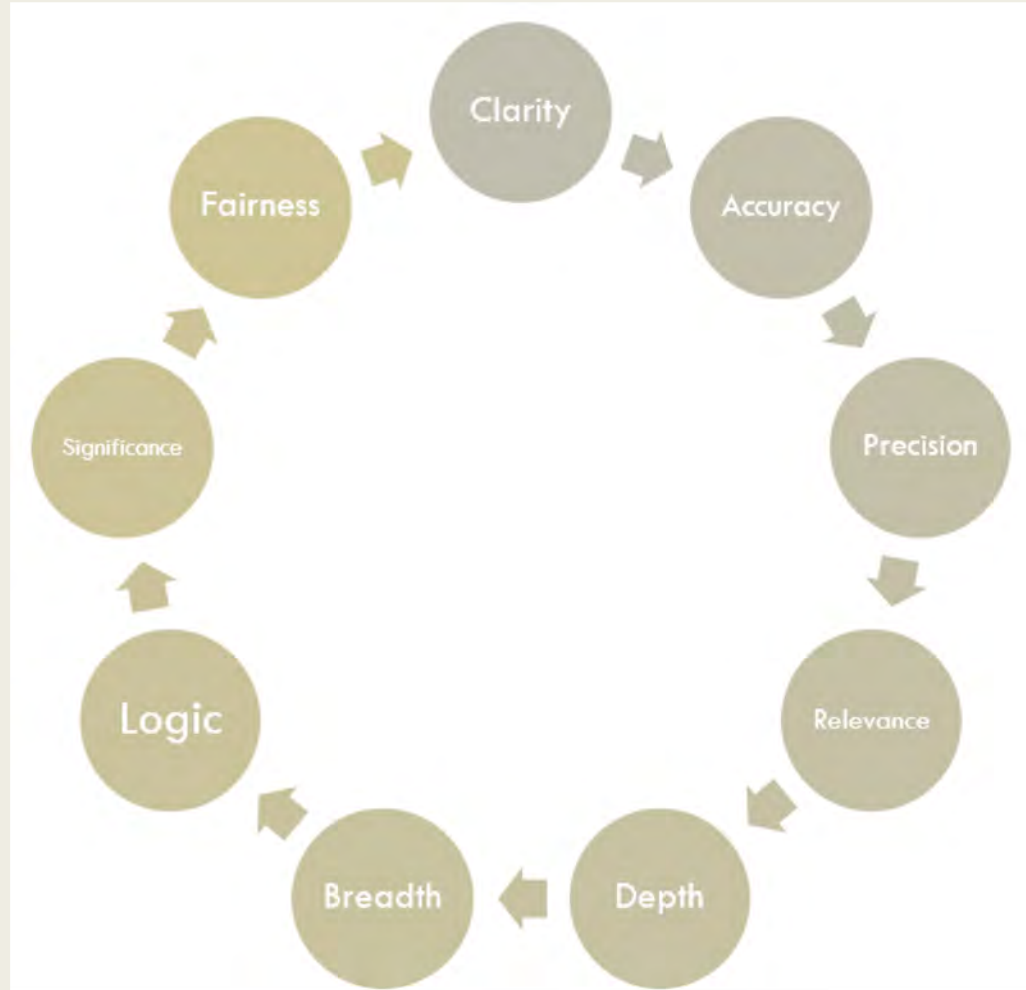
**1. FIND A QUIET PLACE TO READ:** You *must* be able to concentrate to read critically. Turn off the TV, throw your roommate out, hide your iPod, turn off your cell phone. Better yet, find a quiet place like the library. You can't use all your mental capacity if you can't concentrate.

**2. PRE-READ THE ASSIGNMENT:** Skim over the whole assignment very quickly. Get a good idea of how much you must read and what it will entail. Pay special attention to chapter

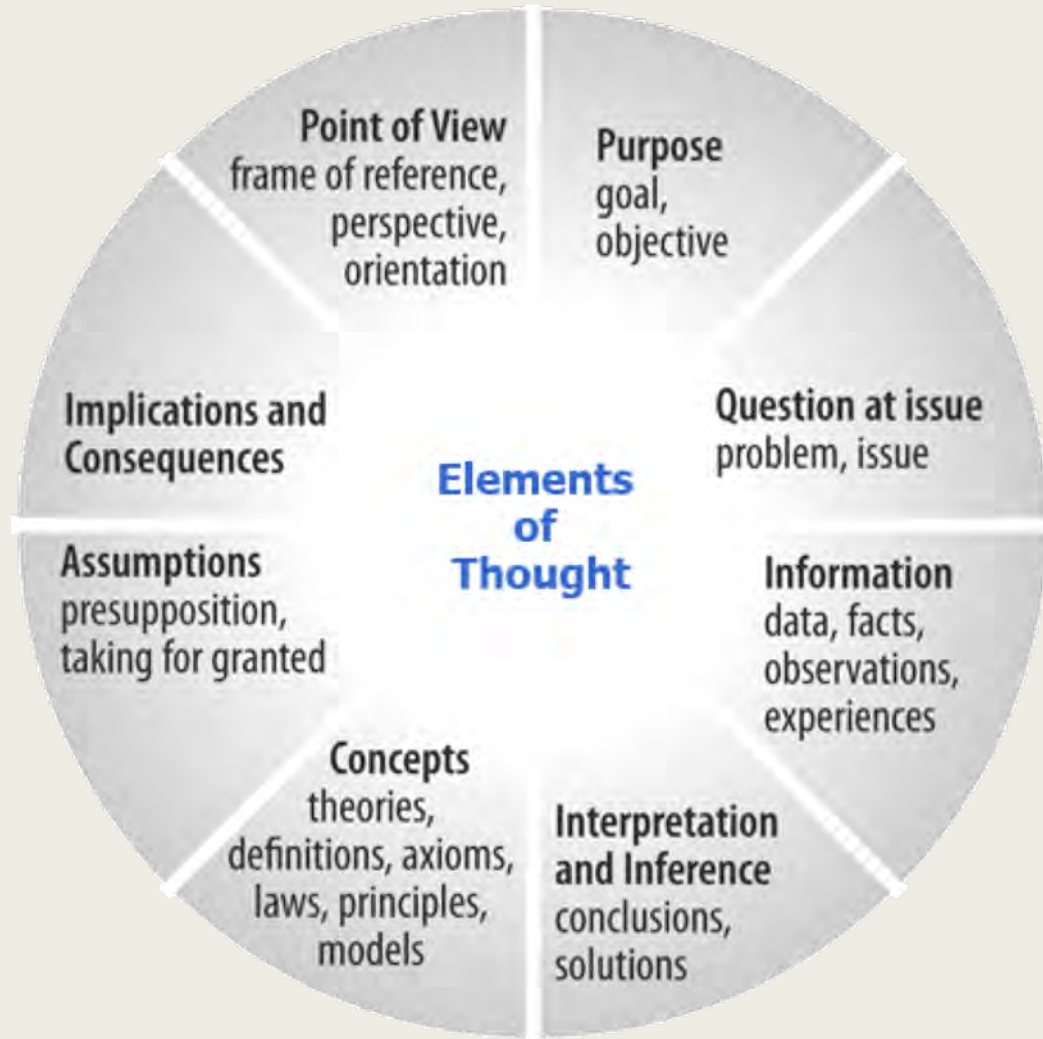




# Example Material



# Example Material





# Practice case study

4 Part I • Learning from Cases

## THE BOYD'S CATERING CASE

Kirsten stopped cleaning the bakery case and looked to make sure that Emily wasn't watching her.

"Did you hear that Tracy quit yesterday?" she asked.

"Yeah, I couldn't believe it. Everyone thought she would be manager this summer. Tracy has worked here almost three years longer than any of us. She'll be a senior this year, so this will be her last summer working here. It was really a shock to her when Mrs. Boyd put Emily in charge."

"She always seemed to enjoy work until Emily came."

"Didn't we all?" I asked.

We both glanced at Emily. She was sitting up front, flipping through a magazine. Margot, Kirsten, and I were all getting ready to close the store. Closing was the worst part of the day, especially now that we had Emily as manager. She had never picked up a broom or washed a dish since she began working in May. I looked at my watch for what must have been the 100th time. Only 10 minutes left. I decided not to sweep the bakery. Emily probably wouldn't check. As I put the broom away, I realized that two months ago I never would have considered leaving without everything looking perfect for the next day.

While driving home, I tried to figure out why I hated work so much now. I had worked at Boyd's Catering for two years. Mrs. Boyd always had about five high school and college girls working over the summer. She was very selective about hiring people. She looked for those who would present a good image for the store. We were always very conscientious and took pride in the store and our work.

Mrs. Boyd and her partner, Mrs. Thompson, had opened Boyd's Catering four years





# Case Study Learning

A description of *an real-life, administrative/ management situation* involving a decision that needs to be made, and is written in such a way that *the reader takes the role of the manager, or key decision maker*, whose responsibility it is to make that decision to help solve the problem.





## What is a case study?



Cases make the connection between academics and reality, theory and practice.



- Real-world scenarios in safe environments (Boyce, 1995)
- Multidimensional situations (Boyce, 1995; Scott, 2007; Vaugeois, 2005)
- Unstructured problem-based learning (Scott, 2007)
- Synthesis of information (Boyce, 1995)
- Must think analytically and demonstrate reasoned evidence (Leonard & Cook, 2010)
- Application of theory/concepts (Davis & Wilcock, 2003)

# Harvard Case Method

## The HBR Process

- Describe
- Analyze
- Generate Alternatives
- Evaluate Alternatives
- Make Recommendations

**Spring 2016 PPTM – 345 Case Study Instructions**

**What is a Case Study?**  
 A case study is a description of an actual administrative situation involving a decision that needs to be made. Most case studies are written in such a way that the reader takes the place of the manager, or key decision maker, whose responsibility it is to make decisions to help solve the problem. In almost all case studies, a description of the situation should be provided, along with the process of critical thinking that led to the decision. Identifying assumptions and biases that influence the decision is also important. The logic behind the decision—identifying contradictions and inconsistencies, interpreting and synthesizing information, and re-evaluating interpretations based on new information—should also be included in the case study.

**The Case Method as a Learning Tool**  
 The case method of analysis is a learning tool in which students and instructors participate in a case study, as opposed to the lecture method, where the instructor speaks and students listen. In the case method, students teach themselves with the instructor being an active guide and facilitator. The focus is on the students' learning through their own analysis of the case.

**How to prepare a Case Study**  
 While there is no one definitive "Case Method" or approach that should be followed in teaching a case study, it is inevitable that there will be some common elements. As you prepare your case study, you should consider the following: 1) Who is affected most by these issues? 2) What are the constraints and opportunities for addressing these issues? 3) What do the numbers tell you? 4) What are the key decision criteria? 5) What are the most important issues? 6) What are the most important issues? 7) What are the most important issues?

**Writing a Case Study Report**  
 For each written case report, you will need to include the following sections:

1. Defining the issue(s)
2. Analyzing the case
3. Generating alternatives
4. Evaluating alternatives
5. Recommending a course of action

**1. Defining the issue(s)/Problem Statement**  
 The problem statement should be a clear, concise statement of exactly what needs to be done. It should not be too broad or too narrow. It should identify the core problem, not just the symptoms. It should also identify the issue for you, while others are not clear at first. Asking yourself the following questions will help:

1. What appears to be the problem(s) here?
2. How do I know that this is a problem? Note that by asking this question, you are identifying the symptoms of the problem from the problem itself. Be sure to identify the symptoms that are most important to most companies, they are in fact the most important to the company.
3. What are the immediate issues that need to be addressed? This help needed to address at another time (preferably by someone else).
4. Differentiate between importance and urgency for the issues. It is important (relative to solving our problem) than urgent.

**2. Analyzing Case Data**  
 Take care in the step to collect and organize data in ways that establish relationships (for chronological events), organizational or the case data, you are trying to answer the following questions:

1. Why or how did the issues or symptoms arise? You cannot solve a problem if you do not understand why it exists.
2. Who is affected most by these issues? You are trying to identify the constraints and opportunities for addressing these issues.
3. What are the constraints and opportunities for addressing these issues?
4. What do the numbers tell you? You need to make a judgment as to their relevance to the case. Not all numbers will be relevant. When deciding what you intend to do with the results, you should consider the following questions:

**3. Generating Alternatives/Potential Action Steps**  
 This section deals with different ways in which you might solve the problem. Typically, there are many, many potential solutions or actions to deal with the problem. The goal is to generate a list of alternatives. The following are the stages of this process:

1. Be realistic: While you might think of many alternatives, only those that are realistic and feasible should be included. Be sure to consider the constraints of the situation.
2. Be creative: Think outside the box. Consider alternatives that are not immediately obvious.
3. Be comprehensive: Consider all possible alternatives, even those that seem unlikely or far-fetched.
4. Be clear: Clearly describe each alternative, including the steps involved in implementing it.
5. Be concise: Keep the alternatives brief and to the point.

**4. Evaluating Alternatives**  
 The question in this step is: How do you figure out what action to take? Answer: You measure the alternatives against the key decision criteria (KDC). The KDC are also how you will determine the success of the decision. For a business decision, the KDC are those things that are important to the organization. Common KDC found in the management world include:

1. Financial performance
2. Customer satisfaction
3. Employee satisfaction
4. Shareholder value
5. Ethical considerations

**5. Recommendation**  
 You must have one Business Alternative that you recommend. Give a justification for your decision (Use the KDCs). Check to make sure that it is one (and only one) of your alternatives and that it does resolve what you defined as the problem.



# 'My' Case Study Process

- Instruction and Case Introduction

1. *Written case study instructions*
2. *Case specific questions*
3. *Case study (and teaching note)*

- Two class periods for discussion

- *First class: Focus on concept or theory, background context of the case, problem identification*
  - Due: Case specific questions
- *Second class: Focus on generating solutions, evaluating solutions, and proposing decisions*
  - Due: Written case analyses



**Table 1.** California Critical Thinking Skills Test (CCTST) sub-domain categories defined.

Skill	Definition
<i>Analytic skills</i>	Ability to gather, organize, synthesize, and scrutinize information and assumptions
<i>Inference skills</i>	Ability to generate solutions to a problem, and use information to make sound judgments and/or draw logical conclusions
<i>Evaluation skills</i>	Ability to critique the quality and credibility of sources, arguments, opinions, etc.
<i>Deduction skills</i>	Ability to trace reasoning from the original information presented to a proposed solution that is logical and justified
<i>Induction skills</i>	Ability to make decisions in uncertain and complex situations, where all the facts may not be available, there are many various perspectives to consider, and/or there are a number of different plausible outcomes that result from decisions made; ability to make "educated guesses" based on limited information

Insight Assessment (2016a).

### The HBR Process

Describe

Analyze

Generate Alternatives

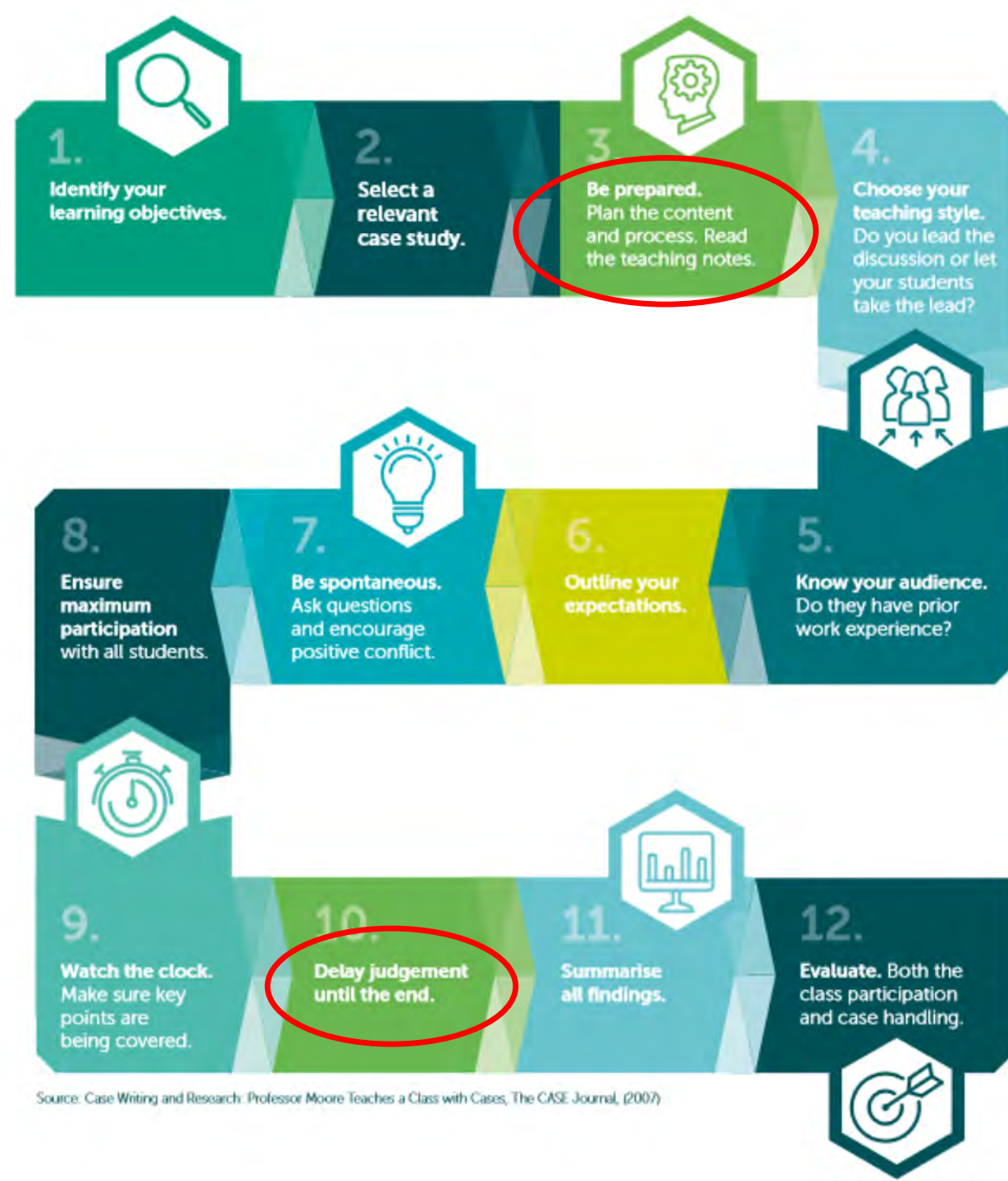
Evaluate Alternatives

Make Recommendations



# Discussion

- Labor intensive and take significant class time (Velenchik, 1995)
- Alignment with course objectives and students prepared to engage (Davis & Wilcock, 2003; Vaugeois, 2005)
- Additional readings/content sometimes needed to help frame issues
- Internationality in developing, implementing, monitoring, and assessing
- Oversimplify real-world issues (Leonard & Cook, 2010)
- Class discussion moderation is important (Vaugeois, 2005)



Source: Case Writing and Research: Professor Moore Teaches a Class with Cases, The CASE Journal, (2007)



*There's a deep vulnerability involved in case teaching. It can be scary even for experienced faculty to lead case discussions.*

(Schiano & Ellet, 2019)



# Utilizing Harvard Business Cases

The screenshot shows the Harvard Business Publishing website interface for educators. The top navigation bar is red and contains the Harvard Business Publishing logo, the text 'FOR EDUCATORS', a search bar with 'All Disciplines' selected, and radio buttons for 'All Collections' and 'HBS Only'. Below the navigation bar is a dark red menu with options: Home, My Library, Disciplines, Content, and Case Method. The main content area features a large 'CASES' heading. Below this, there is a promotional image showing a laptop and a tablet displaying business data, including a pie chart and a bar chart. To the right of the main content, there is a vertical sidebar with a red 'SIGN IN NOW' button, a 'Premium Ed' section, a 'REGISTER NO' button, and a 'BENEFITS INCL' section with 'Educator Copies' listed. At the bottom of the sidebar, there is a blue section with the text 'TEA' and 'MAT'.

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## CASES

**FOUNDATIONAL READINGS**

### Core Curriculum

Core Curriculum consists of individual Readings that cover fundamental concepts, theories, and frameworks that students must study as part of their business education. Approximately 20-30

**SIGN IN NOW**

Premium Ed

**REGISTER NO**

**BENEFITS INCL**  
Educator Copies

**TEA**  
**MAT**

## Case Pack

- Case
- Teaching Notes
- Supplementary Materials
- My Coursepack



# Tourism Management - Spring 2016

January 6, 2016 - July 4, 2016

 STUDENT VIEW

 SHARE WITH COLLEAGUE

## Student Link

<https://hbsp.harvard.edu/import/243424>

**COPY LINK**

EXPIRED

Copy Coursepack to reuse.

**COPY COURSEPACK**

## Enrollment

1 out of 30 (3.33%)

**SHOW ROSTER**

↓↑ REORDER



Main Case

## Fritidsresor Under Pressure (A): The First 10 Hours

Joshua D. Margolis, Vincent Dessain, Anders Sjomar

**Pub Date:** Sep 16, 2006

**Product #:** 407007-PDF-ENG

**Discipline:** Organizational Behavior

**Academic Price:** \$4.25



EDUCATOR COPY



Article

## The Darwinian Workplace

Serguei Netessine, Valery Yakubovich

**Pub Date:** Apr 30, 2012

**Product #:** F1205A-PDF-ENG

**Discipline:** Human Resource Management

**Academic Price:** \$4.25



EDUCATOR COPY



Main Case

## Managing Online Reviews on TripAdvisor

Thales S. Teixeira, Leora Kornfeld

**Pub Date:** Dec 22, 2013



EDUCATOR COPY





Main Case

POPULAR

## Tesla Motors (in 2013): Will Sparks Fly in the Automobile Industry?

Frank T. Rothaermel; Erin Zimmer

**Pub Date:** Jan 3, 2014

**Product #:** MH0017-PDF-ENG

**Discipline:** Strategy

**Length:** 26 p



Elon Musk's reputation as a serial entrepreneur has people wondering what will happen with his current focus, Tesla Motors. In the heavily-fragmented, altern...

 EDUCATOR COPY

 TEACHING NOTE



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Main Case

POPULAR

## Uber and the Ethics of Sharing: Exploring the Societal Promises and Responsibilities of the Sharing Economy

Craig N Smith; Erin McCormick

**Pub Date:** May 29, 2017

**Product #:** IN1344-PDF-ENG

**Discipline:** Business Ethics

**Length:** 33 p



This case explores the changes wrought by the "sharing economy", examining the innovations and controversies surrounding the online ride-hailing service Uber...

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 TEACHING NOTE



ADD TO COURSEPACK



ADD TO COLLECTION



Main Case

OUT FOR REVISION

## Walmart: Navigating a Changing Retail Landscape

Michael E. Porter; Jorge Ramirez-Vallejo

**Pub Date:** Mar 6, 2017

**Product #:** 717474-PDF-ENG

**Discipline:** Strategy

**Length:** 23 p



As the largest company, by revenue, in the world, Walmart has been a lightning rod for criticism. However, in an attempt to stay ahead of traditional and dig...

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 TEACHING NOTE



ADD TO COURSEPACK



ADD TO COLLECTION

# Examples

### Learning Objective

"Seaside Organics" is suitable for use in a variety of MBA and/or executive programs. The case focuses on the kinds of tensions that often exist between entrepreneurs and the managers tasked with running their organizations. It can be used in entrepreneurial management, general management, and organizational behavior courses. 1. Explore the tension between the traits and behaviors of entrepreneurs who build and launch new products and services, and of managers who run stable, enduring organizations. 2. Understand how strategies and policies affect a start-up's long-term prospects. 3. Explore how an entrepreneurial organization matures into a successful going concern. 4. Identify circumstances under which it may be advisable for a company's founder to leave the organization.

### Details

Pub Date: May 1, 2016

Discipline: Entrepreneurship

Subjects: Personal characteristics, Startup, Decision making, Entrepreneurship, Entrepreneurs, Leadership, Organizational structure, Career advancement, Career changes, Organizational management, Organizational change, Business growth, Manufacturing, Start-ups, Conflict resolution, Strategy

# Business foci but topics can transcend...

**Accounting**

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**Analytics**

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**Balanced scorecard**

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**Big Data**

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**Change Management**

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**Consumer Behavior**

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**Decision Making**

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**Design Thinking**

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**Innovation**

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**Internet marketing**

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**Leadership**

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**Pricing**

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**Project Management**

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**Social Media**

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**Sustainability**

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# Other sources for case studies



- Acadia Institute of Case Studies (<http://aics.acadiau.ca/index.html>)
- MIT Sloan School of Management (<https://mitsloan.mit.edu/LearningEdge/Pages/Case-Studies.aspx>)
- Stanford Graduate School of Business (<https://www.gsb.stanford.edu/faculty-research/case-studies/>)
- Emerald Publishing eCases ([http://www.emeraldgroupublishing.com/products/case\\_studies/index\\_us.htm](http://www.emeraldgroupublishing.com/products/case_studies/index_us.htm))





# Q&A

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