

Learning from Case Studies: A Short Guide for Students

Most Strategy courses incorporate case study activity as part of the teaching and learning strategy for the module. This short guide explains what the case method is all about and why cases are used on business and management programmes. The guide also provides some tips on how to get started and how to get the most out of case sessions.

What are Case Studies?

The term 'case study' means different things to different people, but in the field of business and management case studies usually refer to descriptions of actual situations or events in business organisations. They outline decisions, challenges and opportunities faced by a person or persons in a focal organisation and require the learner to make sense of the situation. Cases can come in a variety of different formats; for example, your textbook contains short, end-of-chapter as well as longer and more detailed cases.

Why use Case Studies?

Cases are used on Strategy modules for a variety of different reasons and are designed to help you learn in variety of different ways. J.S Bloom produced a taxonomy of learning, commonly known as Bloom's taxonomy, which is helpful in identifying some of the learning opportunities that can arise from case study activity. Bloom classified a broad range of learning outcomes into six major categories:

1. **Knowledge** - the ability to recall facts, definitions, ways of doing things, laws and theories.
2. **Comprehension** - the ability to change information to a more meaningful form, to paraphrase, interprets, infer, imply and extrapolate
3. **Application** - the ability to apply knowledge, experience and skills to solve new problems in new situations when no directions or methods of solution are specified
4. **Analysis** - the ability to identify components and understand how they are related and arranged.
5. **Synthesis** - the ability to be creative and to produce a new combination not clearly evident before.
6. **Evaluation** - the ability to form criteria, makes judgments, detect fallacies, evaluate and decide.

Case studies can be used to develop and/or assess any or all of these learning outcomes. In addition they can also help you to develop skills in:

- working independently,
- prioritizing tasks
- managing your time effectively
- presenting and defending arguments in a systematic way
- thinking creatively and critically

Given this long list, it is not surprising that case studies feature widely in business and management programmes!

What am I meant to do?

Many students, when confronted by a case study for the first time, feel perplexed and confused about what they are meant to do. The answer to the question 'what should I do?' depends, to a large extent, on the learning objectives set by the tutor. That said, the following section provides some general guidance to get you started. You may not be required to undertake all of the activities described below. With short cases, for example, the emphasis is likely to be on applying theory to practice rather than suggesting putting yourself in the decision-maker's shoes.

Getting Started

- Skim read the case without making any notes to get a general sense of the 'story'. Sometimes the tutor will issue case questions that give you a sense of where to focus your attention but, in some case classes, identifying and structuring problems is part of the task.
- Re-read the case more thoroughly, paying attention to how the data within the case is organised and what pieces of information are where. Don't ignore the appendices or financial data because important data is often contained within these sections. You may choose to number the paragraphs or create an index so that you can easily locate and cross-reference the data.
- Restructure the information contained within the case in ways that make it more meaningful. For example you might:
 - Order events chronologically
 - List problems
 - Categorize different elements within the case, for example you might use different colour highlighter pens to identify information relating to a particular issue
 - Start to link issues

Analysis and Understanding

Gain a deeper understanding of the case by:

- Distinguishing between fact and opinion
- Checking for gaps in information
- Identifying any ambiguity or uncertainty
- Identifying any extraneous information that is of little value

Identify a range of theories and concepts that might be relevant to the case and apply these to the case data in order to assess the situations and to identify issues, problems and challenges. This may be, in part, a trial and error process. Some concepts and framework may provide you with more insight than others. Keep asking yourself the 'so what' question, i.e. what additional insight have I gained from applying theory to practice? Your aim here is to identify and structure issues in ways that make them more tractable. Be prepared to modify or reject frameworks that don't add value.

Assess the importance and urgency of the issues you have identified and attempt, where possible, to distinguish between cause and effect. Note any tensions or trade-offs.

Generating Options and Selecting between Alternatives

Use the knowledge and understanding gained from the taught element of your course and from your reading to generate a list of potential courses of action.

Identify and select appropriate qualitative and/or quantitative decision criteria and use these criteria to select between your proposed alternatives.

Select an alternative and justify your choice, making clear any assumptions you have made. Look ahead at the possible consequences flowing from your recommendations and think about the consequences of assumptions being incorrect.

Some General Tips

There are two essential ingredients for learning successfully through cases - preparation and participation - you need to do both to get the most out of case sessions.

Keep an open-mind in the early stages of your case analysis, don't jump to immediate conclusions and shut out possibilities too early

Make sure you don't lose the wood for the trees. Keep reminding yourself of the overall objective of the exercise and stand back from the detail at regular intervals

Remember that concepts and theories are tools to provide greater insight not merely containers in which to dump information. If you have applied a particular framework or model to the case data, don't forget to communicate the insight that has come from this process.

Don't suspend your common sense. Try to place yourself in the position of one or more of the key 'actors' within the case and subject your conclusions to a reality check.

Reflect on the process and learn from the experience - if you find the cases difficult, try and examine where your discomfort lies. Listen to others and be prepared to take constructive criticism.

Concluding Comment

At the core of case sessions is an emphasis on developing analytical and conceptual skills. In the real world of business, problems don't come neatly packaged. It is as important to know the right question to ask as it is to find the right answer. Case sessions can feel uncomfortable precisely because they mirror the complexity and ambiguity of the real world. Stick with it, the ability to structure problems and make sense of 'mess' is invaluable and is at the heart of the case method.