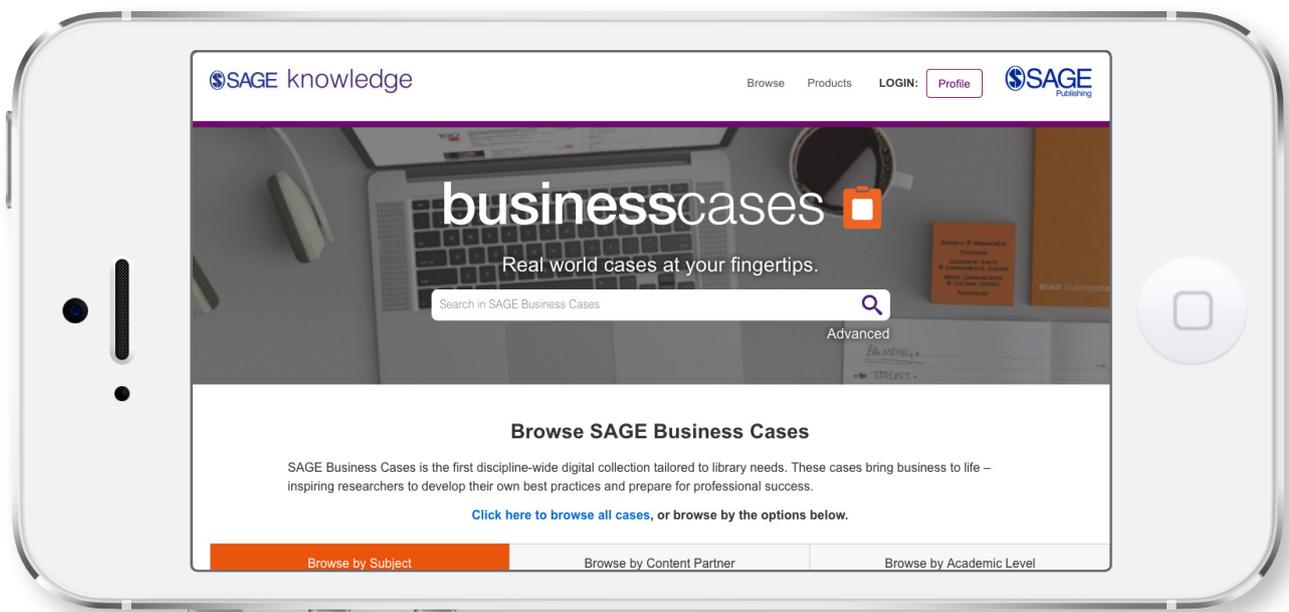


# Learning Effectively with Case Studies



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# Learning Effectively with Case Studies

## A Conversation between a Professor and a Former MBA Student (now Business Consultant)



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in Europe. His research and teaching focus on performance measurement, business planning, risk assessment, and contemporary financial reporting issues. Dr. Barsky is a member of the SAGE Business and Management Advisory Board.

**NB:** Hello. It's great to see you; thanks for taking the time to share your insights and experience with case-based business learning.

**LT:** I am happy to share my thoughts – I hope it is of great help to others.

**NB:** Case-based teaching is popular approach in MBA programs. From your experience, what works best?

**LT:** I learned the most from cases that were based on real, recent corporate issues. They made the textbook theories presented in lectures relatable to the real world, and gave me the opportunity to apply new skills and explore ideas within the safe learning environment of the academic classroom. Ideally, the case would present a current issue or landscape of a company or industry and any supporting information. Then, it would require students to dissect root causes of the issue, suggest a course of action, or identify patterns in the broader industry that may make competitors more or less susceptible to similar issues.

**NB:** What are the attributes of great cases that made the most lasting impression on your learning?

**LT:** I think the ability to identify and leverage trends to extrapolate future events or prescribe a corrective course

of action is invaluable, and the more chances you have to exercise it in business school, the better. One of my professors asked each student to read about mega-trends in the tech sector; at that time, it was probably about the rise of mobile technology and cloud computing. In class, we discussed how these mega-trends would impact our own companies' strategies. I worked for a hospital then, so I considered both the business and clinical perspective. On the clinical side, data analyzed from cloud-based electronic medical records and clinical trials could influence and customize treatment plans for patients. On the business side, if consumers were demanding more access to their shopping and financial accounts through mobile devices, why wouldn't they expect the same from their medical providers? The class discussion was very animated, and other students' comments gave me added perspective on my own industry. No industry is isolated, and being able to recognize broader economic trends and bring them closer to home can be invaluable in a career.

They recently had a conversation about case-based teaching, the transcript of which appears below.

I learned the most from cases that were based on real, recent corporate issues

**NB: What type of pre-work or other guidance beyond reading the case proved to be most worthwhile?**

**LT:** I think it is more realistic to give less information than more, but I appreciate documents that provide background on the industry or business issue. I worked primarily in healthcare before my MBA, so if I have to do a case on Sunoco, it would be helpful to have access to a current analyst or consulting firm's report on the energy industry. Otherwise, you're relegated to Google searches for free content, which yield less robust outputs and inconsistent discussions in class. Similarly, it's important to provide background that is needed to get the full value of the case. If a case is discussing the financial impact of counterfeiting in the apparel industry, students need a very basic understanding of how an apparel company, like Nike or Ray Ban, invests in product and production.

**NB: What are some do's and don'ts of structuring the actual assignment? What facilitates learning without being cumbersome to complete?**

**LT:** I actually love the idea of only doing a presentation that outlines root problems of the case's issue, recommended courses of action, and potential impacts to competitors or the future of the industry. Delivering the presentation in class is optional, and supporting evidence can go in an

**Data analysis is a professional weakness of mine [...] and I wish I had been pushed to do more of it**

appendix, but I like PowerPoint as a deliverable. I've been on both sides of the consulting fence, and I never had to do an eight-page write up for anyone. I had to make slides that told a compelling story to drive decision-making and action. Regardless of the deliverable's format, encourage students to demonstrate understanding and level set on a few key assumptions, and then move quickly to analysis and recommendations. Try to avoid having them write lengthy summaries of background information that was given to the whole class.

**NB: Did you complete cases that involved significant data analysis or other quantitative analysis? And was it more or less helpful than qualitative cases?**

**LT:** Quantitative analysis is always tougher and more tedious, but I think those types of cases are underutilized. Data analysis is a professional weakness of mine (and many other students) and I wish I had been pushed to do more of it. Data is so readily available, and I can't think of an industry that isn't seeking to make more data-driven decisions. The professor can provide an Excel file of data or reports, and then ask students to analyze it, extract meaningful insights, and make recommendations to remedy any underlying problems.

**The ability to draw parallels and act quickly is very valuable and not prevalent enough in the workforce**

**NB: Can you provide an example?**

**LT:** I worked with a number of revenue cycle consultants over the years; their bread-and-butter is taking reports from their client hospitals and looking for red flags in the financials that indicate more systemic process problems. And it's not just a skill for consultants. Imagine you're the hospital employee who makes the connection between missing authorizations and millions of dollars in denials from insurance companies. You've just saved your hospital those millions, plus a hefty consultant fee!

**NB: Did you benefit from preparing a case on your own, sharing with teammates in class, and then discussing with the entire class?**

**LT:** If the case was an individual assignment, especially a shorter case, I liked discussing as an entire class. I think that it's both helpful and interesting to hear other perspectives, especially if classmates either have experience with the subject matter or have a history with the company in question. I generally prefer them to formal presentations; I, and most students, have a terrible tendency to zone out after two of them.

**NB: Did you prefer scenario-based cases (i.e., a managerial dilemma presented in the form of a story or vignette) or fact-based cases (i.e. based on a news event or actual company performance)?**

**LT:** I much preferred the fact-based cases. Fact-based cases felt more applicable because you're drawing insights from someone else's very real success or failure. Chances are, a similar situation could arise in your company or industry. The ability to draw parallels and act quickly is very valuable and not prevalent enough in the workforce. The scenario-based cases somehow seemed less relatable and immediately drew my focus away from my day-to-day and into the classroom. Since they seemed more academic in nature, the lessons learned are isolated to that setting. I don't think it's a heavy lift to replace hypotheticals with recent examples to increase value to students. Even courses or topics focused on team dynamics or softer managerial skills have examples in industry.

**NB: Do any specific examples come to mind?**

**LT:** Take Marissa Mayer. A few years ago, she sent a highly publicized email that abruptly changed Yahoo's policies on working from home. It's a solid case study in org sociology and HR policy, but the email itself became a classic lesson in change management, changing corporate culture, and employee engagement. Let's assume that Mayer's decision was thoroughly researched and vetted; the way she delivered it made it seem compulsive and paranoid.

“ A business’s strategic plan is only as good as its ability to execute on it ”

The underlying tone said, “I don’t trust anyone working off-campus to be productive,” which is surprising for an industry that frequently uses off-shore talent. A business’s strategic plan is only as good as its ability to execute on it. If leaders fail to rally employees around an effort, it’s going to be very hard to make it successful, and could lead to other problems like employee turnover from lack of motivation and poor morale. The ability to tell a compelling message is important at any level of an organization. What good is all the number crunching and analysis if the message undermines it?

**NB: Were cases more effective when faculty were able to connect the content to broader course themes, activities, or topics?**

**LT:** Absolutely, but that’s what makes a great course in general. The best class builds on itself as a journey throughout the semester. On the first day, the professor outlines a set of objectives and a final project. Each lecture, reading set, research assignment, and class activity is deliberately chosen or designed because it provides an input or insight needed to accomplish the broader deliverable. Case studies can be an integral part of this learning. If a project requires students to develop a growth strategy for a company, a case study on one that failed or struggled with international expansion might provide some good lessons and guardrails.

**NB: Faculty often assign some team dimension to case analyses. What would improve the nature of team experiences?**

**LT:** I had such a love-hate relationship with team assignments. When teams are properly incubated, and are used for cases that are more complex or longer in duration, a team can produce a more robust deliverable than an individual. The best group experience I ever had was with a professor who asked for a quick summary of our professional experience and performance goals. He actually used it to structure the teams with varying experience and a clear leader. For example, he placed someone trying to get promoted in a leadership role who helped someone with less experience learn the data analytics required for that project. I like to work with my friends as much as anyone, but this 1) facilitated a complex, customized learning environment, and 2) eased the awkward exchange that inevitably arises when everyone wants to present one slide to earn an individual grade.

## Lydia’s Insights

**NB: If you could offer business school faculty three insightful bits of advice about teaching cases, what would they be?**

- 1** Don’t be afraid to use cases; they can be very powerful learning tools when leveraged and structured appropriately. Unfortunately, if not used properly, they can create disengagement in the classroom. Everyone’s time is valuable – utilize it accordingly.
- 2** Less is more. Quality over quantity. Try to go for one or two impactful cases to emphasize key learning objectives, rather than pepper your whole course with shorter ones.
- 3** Don’t be afraid to push students beyond their comfort zones. In hindsight, I remember a lot more from the challenging classes than I do from the ones that just checked a box. I know I may be asking some professors to step beyond their own realm of comfort, but great cases can be the tool to help students find where learning really begins – just outside that comfort zone.

“ I don’t want to Google the “right” answer or summarize anything to prove I understand it ”

**NB: When a case proved to be ineffective, in your opinion, what were the weaknesses that you would encourage other faculty to avoid?**

**LT:** Cases fail when they are outdated or far fetched, don’t obviously relate to course themes, or seem like a chore because the questions aren’t intellectually stimulating. I don’t want to Google the “right” answer or summarize anything to prove I understand it. I’d rather stretch my intellect within the walls of academia and use data and evidence to explore bold assertions around the art of the possible. Rather than ask “what would you have done in situation X,” ask “what does this mean for the company’s strategic planning, competitors in the industry, broader economic trends, etc.”

**NB: Thank you! Your insights and guidance will certainly benefit many faculty and students in the future. We appreciate your time and thoughts.**