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TEACHING CASES ON SMALL BUSINESSES FOR TODAY'S GENERATION

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Abstract

Although case study instructional methods have been used in business schools for many years, the practice of teaching with case studies has largely followed a specific delivery and implementation style often credited to Harvard Business School and focused on large, publicly traded firms. Many other alternatives exist for implementing case studies for today's college students that focus on small businesses (i.e., where more of them are likely to gain employment). Accordingly, this study provides an overview of the case study methodology and then explains three useful alternative methods for delivering small business case studies to Millennials and Generation Z (and occasionally other generations) in face-to-face courses including a Team Based method, an Expert Teams method, and a Theory Based method. Synthesizing course material with real world examples in a debate format explains the Team Based method, establishing experts (teams of students) on a particular case and engaging such experts with questions from remaining participants explains the Expert Teams method, and applying course models to previously analyzed cases explains the Theory Based method.

Keywords: case study; case method; small business; management education; millennial

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Introduction

Management education curriculum often relies on case studies to help students understand business problems, conduct analyses, make decisions, and generate solutions. Largely this has been an effective pedagogical practice to enhance student analytical capabilities (Ates, 2013) and deepen understanding (Rendtorff, 2015). To date, the Harvard case study methodology, a method of teaching with cases that generally forces students to be prepared to spontaneously verbally synthesize, make decisions, analyze, and identify problems within varying (usually larger) business scenarios, remains popular and heavily used (Barnes, Christensen, & Hansen, 1994; Kimball, 1995). Yet upon critical review, this method has certain limitations (i.e., Damle, 1989). For example, Booth and colleagues note that as class sizes expand, the issue of free-riding becomes more problematic (Booth, Bowie, Jordan, & Rippin, 2000), while others take a metamorphic approach that suggests the need to be more open to diverse meanings within case studies (Greenhalgh, 2007). Hence as the nature of today's learning environment has become more dynamic, the delivery of case materials needs greater flexibility. Another critical factor in the ever-changing dynamic within the classroom is the noticeable change in generational differences in the student population.

To echo some of these concerns and suggest that more alternatives are needed in case instruction, three alternatives with a focus based on small businesses are offered for instructors to use case-based instruction. While a great proportion of our students will work for small businesses, small business strategy is historically housed within entrepreneurship education (e.g., Matthews, 1998; Zeithaml & Rice, 1987) and lacks coverage in many strategic management textbooks and courses. Thus, this study provides explanations describing how each alternative can be implemented and delivered with greater emphasis on learning using case studies for two of the most likely contexts: today's generation of college students and in small businesses. Moreover, a comparative table of the different case delivery alternatives for face-to-face courses is included; this allows other instructors to gauge which alternative might best match the case and context that s(he) wishes to deliver. Before describing these alternatives, an overview of the case study method and a description of the generations of students represented in the present student population is provided. Then, three alternative techniques to delivering case studies are explained. This is followed by a discussion, which includes limitations, future research, implications, best practices and the conclusion.

Learning Theory, Case Studies, and Context

Before delving into the specifics of case study techniques, past research on contextual factors and their relationship to method choice must be reviewed. Reviews indicate that the most common practice in case study delivery is the Harvard Business School (HBS) method (Barnes, Christensen, & Hansen, 1994; Kimball, 1995). Relatively little research, however, has explored the applicability of this method to various educational settings and learning styles across generations. Indeed, while there has been some variation, such as case playing (Wilson, 2015), changes in education tools and delivery techniques, as well as changes in generational expectations and learning styles may affect the applicability of particular methods of case study pedagogy.

Learning Theory

Management scholars have long battled an objective pedagogical approach, where information is disseminated strictly in a one-way path from instructor to student. Students assume the role of passive learning in these traditional lecture structures (Bouton & Garth, 1983). This approach relies heavily on surface level learning and the process of memorization or regurgitation of course material (Entwistle, 2003) and is generally disregarded as a sufficient learning outcome (Pfeffer & Fong, 2004). Specifically, in the context of management, the lack of application based knowledge underequips students to make real-world decisions that they are sure to encounter in their respective careers.

Organizations tend to seek applicants with a refined skill set, who can not only diagnose a scenario but also properly implement decisions (Bossidy, Charan, & Burck, 2002). In the context of strategic management especially, decisions cannot be made in a vacuum or without time constraints. Supporting this, Sroufe, Sivasubramaniam, Ramos, and Saiia (2015) note that business graduates must understand cause and effect relationships, stakeholder ideals, and how to foster short and long-term company success to manage effectively. To be most aptly prepared for the context surrounding career relevant decisions, students need to learn in such a way that supports that thought process. Learning and program design must also be centered on goals and objectives that are directly tied to the course context (Sroufe et al., 2015). This also allows for direct and easily connected evaluation of program design in terms of experiential learning and effectiveness (Sroufe et al., 2015).

Both academics and practitioners alike have acknowledged the acute need for learning rooted in experiential, analytical, and problem-solving curricula (e.g., Foster & Carboni, 2009; Peterson, 2004). Such experiential learning is in its simplest form is when the student shifts from the role of passive listener to that of active respondent (Hawtrey, 2007). Learning of this form is more holistic in approach as the learner is forced to employ not only life experiences, but also reflect on these experiences to derive meaning (Kolb, 1984). To facilitate student learning, a number of methods have traditionally been successful in and out of the classroom. Internships, simulations, and case studies represent a sample of some of these. With this in mind, experiential learning methods can remind students that everyone can offer useful insights, but all participants must collectively communicate knowledge and share their ideas to foster collaboration (Trefalt, 2014). The remaining narrative of this manuscript focuses specifically on the latter, the case study method.

"The" Case Study Method

HBS is largely considered responsible for generating the mainstream technique for delivering cases in business schools. HBS describes their case method as placing the student into the role of decision maker; giving them the power to analyze, identify problems, and more. To accomplish this, students are required to read cases before the formal class meeting in which they participate in a guided discussion that allows them to address issues, discuss differing opinions, explore alternative solutions, and more (HBS Case Method, 2016). This process can stimulate greater classroom participation, along with a deeper understanding of the topic/issue outlined in the case. HBS outlines appropriate methods for structuring case study learning. These include describing learning objectives, teaching opportunities and challenges, and the design of the class as elements of effective class preparation before utilizing the case method. Learning objectives must be identified before the selection of the case. Teaching opportunities and challenges must be analyzed before and after selecting the case, and the class design must be well developed including the structure, opening, discussion leadership, and conclusion to ensure the method is effectively carried out (Elements of Effective Class Preparation, 2005).

Today's Students: Generational Differences in the Classroom

Depending on the nature of any institution's student population, classrooms today have the potential of four representative generations: Baby Boomers, Generation X, Millennials (Generation Y) and Generation Z. Although most classrooms are likely populated by members of the latter two generational cohorts, it is still worthy of note that non-traditional students of Generation X are still present in the student population, particularly in alternative classroom formats. Baby boomers may also be present in some classroom formats. Relevant in this context, baby boomers are individualistic, commonly reject authority, value instant results, and prefer environments where they can easily form relationships with others (Sandeen, 2008), and members of Generation X typically seek to maintain a work-life balance and aim to avoid long hours at work, instead opting for self-directed or independent projects (Leibow, 2014). Alternatively, members of the younger generations (Millenials and Generation Z) tend to be more reliant on supervision, feedback, clear goals, structure, and mentoring (Feiertag & Berge, 2008; Gibson, 2015; Renfro, 2012). They are characterized by short attention spans, being easily bored, visually stimulated, multitasking, motivated by their need for a sense of purpose and belonging to meaningful communities (Pew Research Center, 2014), and with a focus on outcomes (grades) more so than learning (Feiertag & Berge, 2008).

Context: Cases and Today's College Student

The case method is renowned for breaking the mold of traditional classroom learning and increasing conceptual understanding and collective engagement among students (Herreid & Schiller, 2013). While the case study has inspired many alternative instruction methods in business schools, the case method is sometimes viewed as an outdated teaching concept/model, which students have grown to resent and resist. Some instructors even deem the case method as simple story telling (Herreid & Schiller, 2013). Even as publishers update case offerings on a constant basis to appeal to the students, a disconnect remains between students and engagement with the material. Generational research on learning theory suggests that today's traditional college-age students tend to be less independent than previous generations and thus require different amounts of guidance and feedback (Feiertag & Berge, 2008). These students tend to communicate less effectively by traditional standards, but are highly skilled in constant, technologically based communication and interactive exchanges (Feiertag & Berge, 2008).

By and large, the student population of today is shaped by a society that has often over-inflated their individual self-esteem, recognized them for any accomplishment and accommodated their exploration of uniqueness (e.g., Alsop, 2008; Twenge & Campbell, 2008). Bushman, Moeller, and Crocker (2011) found that college-age students value self-esteem more than food, sex, money, and friends. The findings of such studies have multiple implications for the evolving presentation of management curricula. As accrediting bodies call for more and more coordination across courses, this one-size fits all approach may be detrimental to the learning potential of today's generation. The case method, historically, has created a platform for critical analysis and problem-solving refinement. The new perspective of today's generation presents an opportunity to refine this established method for maximum effectiveness in management classrooms.

Accordingly, these reasons present a need for alternatives to the traditional case method, both in content and delivery. There has been some progress to create alternatives. Indeed, some instructors are using the "flipped classroom," where students view case studies on their own time at their own rate (Herreid & Schiller, 2013). Instructional strategies must continue to evolve, thus this study offers a focus on small business as that pivot and presents three alternative delivery methods for using cases in the classroom. The underlying learning theories advocating the usage of case studies are still relevant. However, as with any type of change, the case method may need a flexible adaptation to match current behavioral and learning styles.

Context: Making the "Case" for Small Business Content

As mentioned, even as publishers and academics strive to infuse trendy companies into the classroom, the level of engagement (and subsequent learning environment) still disconnects. Although, on the surface, students may connect with the companies, their true connection generally ends there. In 2015, there were 30.2 million small businesses that have created roughly 66% of all new jobs since 2000 and employed more than half of all Americans (SBA, 2018). Odds are, students are most likely not only to start their careers in small businesses, but to maintain these careers throughout their duration.

Though probabilities dictate that students are more likely to be employed with small businesses at some point in their careers, this does not justify a large-scale sweep of case content and does not guarantee a new-found level of engagement and learning in the classroom. Trendy companies have long been a draw for students as the content is relevant and the topic is potentially less mundane. However, from a learning perspective, criticism has grown. With subsequent generations, students have become more disassociated from the high growth ventures prominent in the typical case format. These cases largely disconnect not only from where students are most likely to spend their careers, but also in regard to their perspectives and value structures. Choosing cases focused on small businesses may allow for deeper understanding that is not possible in cases focusing on larger (and often trendier) businesses with high complexity (Pearce, 2002). While small businesses have their own set of complexities, the nuances are often quite different. For example, small business case analyses may find more relevance in discussing family businesses and family succession. Small business cases may also devote time to better understanding local governments in which they operate, particularly if it is a local case. Alternatively, large business cases often focus on excessively complicated transactions such as the challenges present for large mergers and acquisitions (e.g., KraftHeinz). Using small businesses for teaching cases may result in a balance that is ideal for student learning and discussion (Pearce, 2002). By focusing on small businesses cases, students may gain knowledge and skills that are more relevant to their future careers.

Both Millennials and Generation Z are socially focused and action oriented. Connectivity of their job and subsequent impact is critical, especially for Generation Z (Scott, 2016). Furthermore, each of the two generations have sequentially been pegged as the most entrepreneurial generation ever as the majority aspire to own their own business (Schwabel, 2014). Today's generations embrace the obligation of advocating change in the world (Twenge, 2010) and small businesses offer a far more malleable structure and platform to accommodate impact. Small businesses generate 16 times the number of patents per employee than do the large companies (SBA, 2018). Small business owners maintain autonomy and control, while being free from social constraints (Shane, 1995), thus facilitating innovation. These characteristics meld harmoniously with the overarching perspectives of the current generations (Twenge, 2010). Additionally, research shows a consistent generational trend toward leisure-related values. For instance, Millennials tend to place more emphasis on time off, work-life balance, and being entertained (Twenge, 2010). One of the reasons small businesses are such a major employer in the U.S. lies in the advanced flexibility over larger businesses to offer employment to those with varied work histories and needs (Katz & Greene, 2017).

Three Case Based Instructional Alternatives Addressing Changing Times

It is acknowledged that just a mere switch in the content of cases in any course offering will not cause a paradigmatic shift in student learning. Widespread curriculum already exists in the entrepreneurship and small business arena and small business cases are plentiful. For the proposed case learning initiative maximization to occur, the structure and delivery of the case method must also shift to accommodate the content. With that, three approaches that align themselves with the tenants of small businesses are proposed.

Each of these three alternatives has similarities and differences in comparison to the HBS case method, but each also uniquely integrates components of small businesses that are especially relevant to the current generation of students. Other instructors may find certain alternatives useful for varying cases and contexts. For convenience, a summary of the HBS case method and the three alternatives is included in Table 1.

Table 1: Comparison of Four Case Study Methods

	HBS Technique	Alternative 1 – Team Based	Alternative 2 – Expert Team	Alternative 3 – Theory Based
Summary	Students individually prepare to explain problems and make decisions during an instructor led discussion	Student teams review a case on their own and all participate in a class discussion and debate based on instructor prompting	Student teams present a case and recommendations to the class followed by a Q&A session to support their decisions	Students individually prepare to use analytical techniques to answer in-class case-based questions
Instructor prep amount required	High	Moderate	Low	Moderate
Class structure and formalization level	High	Moderate	Moderate	Moderate
Class time required	Moderate	Moderate	Moderate	Low to moderate
Recommended class size	Medium to large	Medium	Medium	Small to medium
Graduate/Undergraduate appropriateness	Graduate and undergraduate applicability	Ideal for introductory undergraduate course types	Graduate and undergraduate applicability	Ideal for advanced undergraduate course types
Level of student preparation required	High	Moderate	Moderate	High
Availability of applicable cases	High	High	High	High

Alternative 1 – Team Based

The purpose of this initial alternative is to synthesize the text material with real world examples and create an environment simulating a competition in a debate format. Participants are typically divided into teams of four to five or as the instructor sees fit. This method works well when paired with any other semester long team project as students are already on teams. Alternatively, based on student feedback, this option may not be an ideal fit for students who are competition averse or anxious in competitive team environments. Each team is assigned the same case including additional instructions for analyzing and discussing the case material. This alternative begins with students gaining a general impression of the case on their own followed by more collective team discussion and interaction. Moreover, this option requires participants to actively contribute to the activity and create new knowledge and ideals on the spot. Certain nuances in the directions encourage participation from all students and not simply the top performers. By debriefing the case at the end of the discussion, instructors can point out specific student examples of information syntheses and integration to encourage students to prepare more holistically for future discussions.

Table 2: Learning Objections of Alternative Case Study Options

Alternative 1 – Team Based **Learning objectives.** 1. Students will actively participate and gain a greater understanding of course material. 2. Students will be motivated to work collectively, thus increasing effective teamwork. 3. Students will problem solve in a timely manner. 4. Students will compare and discuss ideas they presented with ones presented by rival teams and the instructor at the conclusion of the activity, enhancing reasoning and depth of understanding of course concepts.
Alternative 2 – Expert Teams **Learning objectives.** 1. Students will be held responsible for the main content of this method, as they will be carrying out most of the method in the form of expert team presentations. 2. Students will demonstrate a deep understanding of case material as applied to course concepts. 3. Students will enhance their abilities to lead a discussion, as well as their abilities to analyze and rebut content presented. 4. Students will evaluate presented material in a manner that fosters discussion and generates new ideas related to the content. 5. All students will actively participate.
Alternative 3 – Theory Based **Learning objectives.** 1. Students will actively implement analytical models presented in lecture sessions and demonstrate their understanding of prior course material. 2. Students will present course material. 3. Students will engage in collective discussion and analysis of content that classmates present. 4. Students will be held responsible for explaining course material. 5. All students will actively participate.

Of the three alternatives, this model most closely resembles the HBS case method. Students work in teams to prepare for a discussion where they are responsible for contributing and synthesizing content form the course with situations in the case. The discussion of the given case will be facilitated, but the path and depth of the discussion will rely upon the combined contributions of each team. Each team is expected to generate ideas both individually and as a team and then contribute those ideas in the collective team discussion between teams (and facilitated by the instructor). While participants will have read and discussed the case in advance, it is very difficult to predict the direction of the discussion. Thus, this alternative also provides a comprehensive test of students' knowledge. Even though the case content from the text may remain static, the nature of the debate and presentation changes each time as the direction, coverage, and issues raised are dictated by the students. The students are competing for a scarce resource (extra credit points) and must prepare and operate in an unknown/volatile environment that changes each week. For more details regarding the learning objectives and student feedback, please see Tables 2 and 3.

Alternative 2 – Expert Teams

Alternative two can be accomplished in groups of two to six members in which one group of students prepares a presentation on a specific case in advance. They are considered the experts for that case and discussants on the other cases. The presentation includes the basics of the case, outside research, recommendations and solutions, and other information that the group chooses to include. The presenting group is the focal group. After presenting the case, groups will be engaged by the instructor as well as the rest of the class in a question and answer session. Generally speaking, students have very intense preparation for their expert case and then less preparation for the other cases. However, students that are easily bored when not the focal point of the project may become disengaged.

This alternative case method differs in that it requires more outside research, preparation, and planning during students' respective expert weeks. The presenters/experts answer all questions and guide the discussion. To increase overall class engagement levels, non-presenting participants may be required to prepare a one-page document of comments and questions they intend to contribute to the discussion. This ensures every student is prepared rather than only preparing for one case and then free riding on the other cases. This method greatly reduces preparation for instructors since the presenting team is responsible for answering all questions and concerns. Alternatively, instructors may need to spend more time evaluating students' work after the presentation and discussion. A major objective of this method is increased student leadership behaviors in at least one of the case presentations and discussions. Refer to Tables 2 and 3 for more information regarding learning objectives and students' feedback. Implementation instructions are provided in Appendix 3. Please see Appendix 4 for a student handout that lists more detailed instructions for the expert team presentations.

Table 3: Student Feedback

	Student Feedback
Alternative 1	• Although I didn't like the cases in the beginning, the debates by the end of the semester became my favorite part of the course. • The cases – loved the fact that we (students) decided the topics to discuss about each company and were in control of the conversation. • I didn't think I would learn so much from my classmates when discussing the cases each week. • I'm not normally a competitive person, but the cases each week motivated me to really work hard with my teams to try and win the debate each week. • The cases caused me a great deal of anxiety each week. I thought if I didn't speak I was letting my teammates down.
Alternative 2	• I enjoyed asking the other groups tough questions to see how prepared they were. Sort of like a board room setting. • Group work is challenging but it wasn't bad since we just had to prepare to be the experts once and the other weeks we were learning from our peers and having discussions about what we read. • Really digging in to one case rather than knowing surface level info. about many cases is what I liked about it. And because I got to research and present on a corporation that I was truly interested in. Having a choice in the matter was key if you want students to actually be an expert during their presentations. • The presentation was challenging and as were the questions, but I gained a much more thorough understanding of my case than discussions I'd had in other classes. • It was fun when we were the experts, but the other times it could be boring just watching.
Alternative 3	• I love Dr. -----! He makes the class very interesting because he doesn't focus solely on theory. He often talks about things that we will encounter in the real world. • Weekly Case study: Very Useful • Dr. ------is AWESOME. I wish we had more professors like him. His classroom cases always make us think and challenge us to look at things differently. He keeps track of participation and I enjoy his grading system. • The course is a bit difficult being that it is for graduating seniors. His methods of teaching were fun and showed his personality but were also helpful in really understanding the material. • Dr. ------ is amazing. Instead of having a structured lecture, he allows ample time for class discussions and sometimes turns that into his lecture. • Excellent professor! Instructor & course provides a good information, examples and applications of how it could be in the business world depending on the area, field or position you would be entering. • He explained things well and made it easy for me to understand the material. I love how his class is structured! • Not knowing the exact topics we would discuss or the direction each discussion would go was a bit frustrating. I like to be more informed and more in control.

See Appendices 1 and 2 for implementation instructions and additional information for a version of the instructions that can be shared with students. Appendix 2 also provides further suggestions for students and caveats for the instructor.

Alternative 3 – Theory Based

This alternative is suitable for small to medium size classes meeting face-to-face. Students are assigned to read the case beforehand and prepare to be called on in class. Preparation is comprised of being ready to present to the class a full application of a model presented in an earlier lecture session. Students are called on in class to apply the various analytical approaches (e.g., Porter's Five Forces) and develop their own conclusions and recommendations. Lectures on the analytical techniques are usually interspersed between case studies and the written case exams and also follow the same format. During the called-on students' presentation other students are encouraged by the professor to challenge or elaborate on the presenters' examples, analytical framework, and conclusions. After the first analytical technique is presented and discussed, the professor calls on another student to present an alternative technique. In larger classes, especially with a student population inadept to verbal communication, greater attention might be requisite to ensure engagement among the entire class.

Examples of analytical models might include the business plan canvasses, ratio analysis, Porter's models of competitive forces of strategy, or the value chain analysis. A full application of an analytical model would be expected to cover all the parts of the model explicitly by name, provide examples from the case or industry that illustrate the part, and finally, to use the technique to develop a conclusion leading to a recommendation for action by management. Students caught unprepared for the class discussion are penalized and students contributing are rewarded in their class participation grade. Peer and social pressures contribute to class involvement while the professor attempts to encourage the smooth flow of ideas. Please see Appendix 5 for implementation details.

Discussion and Conclusion

This study incrementally contributes to the case study method pedagogical literature by first exploring the potential disconnect between current cases and learning outcomes and offering a potential shift of focus toward small business. To maximize the connectivity and engagement with today's generations of students, it is paramount to consider both the content and delivery methods of the small business case perspective. Lastly, by explaining, comparing, and contrasting three alternatives, instructors may consider using these methods in place of the more standard HBS case method. These case method alternatives provide instructors with options to align their cases and contexts to varying case delivery alternatives in today's classroom. Educators may find particular value in situations where a case study approach is preferred, but the traditional Harvard model is not a perfect fit. Alternative one and alternative two tend to work well in situations where classes are a medium size and well suited for small teams. Likewise, alternative three may be a more viable alternative in classes too small to divide into multiple teams. As such, varying case method alternatives should be considered based on class sizes.

The three alternatives may also be helpful to instructors of varied class levels. While the format of alternative two and three may be more applicable to more advanced course levels, alternative one provides an option that allows even introductory-level courses to effectively incorporate a case study methodology. Likewise, the level of student engagement has been a limiting factor in the effectiveness of the HBS method. The high degree of student preparation needed to effectively incorporate the HBS method may reduce the utility of the case study methodology in courses or programs with lower levels of student engagement. In such situations, the spontaneous and engaging nature of alternative one may not only be a means of incorporating some type of case study methodology into the classroom but may serve to increase the level of interest and engagement of students.

Also, worth noting is the variance of the alternatives presented above in terms of the level of class time and instructor preparation involved. An instructor with minimal availability of class sessions to use for case studies may elect to use alternative one or alternative three due to the brevity of the formats. An instructor with greater class session availability may consider the use of alternative two given many sessions are needed so that each team has a session/case to play the role of the experts. Similarly, instructors with minimal time to prepare may elect alternative two due to the predominantly student led usage of time. Although more time intensive, instructors could consider option three as an alternative to testing given that students individually apply analytical techniques to a case.

Regardless of the selected method, the following best practices are recommended for instructors to accomplish learning goals and enhance student learning in each instructional method: 1) actively create a classroom/course environment that allows for open discussion and in which all students feel welcome and encouraged to continuously share information, 2) hold a trial run to identify potential issues before using the method in the course, 3) quiz students (or test their understanding in an another form) on the instructions and their required tasks before beginning the method, 4) ensure all student (and instructor) questions are answered and issues are resolved before implementing the method, 5) develop potential backup plans for every step of the method, 6) continuously monitor and evaluate the success or failure of the method during all steps, 7) be as transparent as possible in terms of what is expected of students during every step, and 8) request and welcome student or other participant feedback throughout the method (at planned intervals) and upon completion.

As with any manuscript, this one is not without limitations. A more exhaustive overview of the case method and/or list of alternatives may be needed as educational methods evolve and become more complicated. Additionally, the current study did not review specific alternatives suitable in online or hybrid classes, yet other scholars have shed light on this need (see Rollag, 2010; Watson, & Sutton, 2012). Watson and Sutton (2012) suggest that the case method is effective in face-to-face courses, yet online courses can also effectively incorporate the case method if the instructor uses methods that engage students and create interaction (student to student and student to instructor) to the same degree as the face-to-face modality. Notably, online courses should not attempt to replicate the dynamics of face-to-face courses, instead, instructors should employ other methods using technology, such as asynchronous discussion posts or team tasks (Watson & Sutton, 2012). Teaching with cases in an online setting can be as effective as face-to-face alternatives, yet online modalities are generally more time intensive due to the need for greater instructor preparation and involvement to monitor and keep asynchronous discussions on track, while in the face-to-face setting, instructors can subtly shift discussions with lesser effort (Rollag, 2010).

While these settings are important in their own right, the nature of case studies as dynamic interactions may be best suited to face-to-face courses rather than other communication methods that are limited by their inherently lower fidelity levels. Despite these limitations, the current study adds value to the growing body of educational literature related to case study methodology and provides instructors with useful alternatives for teaching with cases. The goal of this study was to provide a brief overview of the case study method and to describe three alternatives that the authors have used in undergraduate and graduate level courses. The intention was not to criticize nor discount the HBS case method but rather provide useful alternatives to instructors. Hopefully these alternatives prove useful as instructors continue to align case method delivery with case material and contexts.

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Appendix 1. Implementing the Team Based Method

Prior to Implementation.
1. Assign teams and provide access to the assigned case.
2. Provide instructions (see Appendix 1) and requirements for reviewing the case prior to class.
   a. Inform students exactly what is expected of them in preparation for and during this method.
3. Encourage students to determine potential questions/concerns and share them prior to the method.
4. Develop backup questions to ask students if discussion lags.
5. Develop a foolproof way to record participation of teams and individual students during the method.
6. Create a means of obtaining student feedback after the method is complete.
   a. This could be a questionnaire, in-class discussion, etc.
7. Remind students to ensure they have access to the case material during the method.

Student preparation.
1. Review instructions provided by the instructor.
2. Read and analyze the assigned case by taking notes and making sure to grasp a complete understanding of the material.
3. Discuss the case with team members prior to the class meeting.
4. Make sure to have access to the case material during the method. (This can be a physical or digital copy).

During the team based method.
1. Begin by arranging the classroom area into an appropriate space for teams.
2. Provide a blank sheet of paper for teams to write their team letter large enough for the instructor and all classmates/teams to easily view.

Instructor requirements.
1. Direct each team to an appropriate table.
2. Ask all teams if they have any questions before beginning the method.
3. Keep track of team participation. For example, one member should not always speak for the entire team.
4. Begin by asking each team questions that they are familiar with (i.e., the questions on the instruction sheet in Appendix 2).
   a. Include other questions here that arise during the method or that were previously created.
5. Allow all teams to discuss each preparation question until the topics are exhausted.
6. Move on to the re-analyze step of the method by allowing students the opportunity to take another look at the case considering their own points and also considering ideas presented by other team.
7. Continue by asking each team questions that allow them to reanalyze the situation (i.e., the questions labeled re-analyze on the instruction sheet in Appendix 1).

a. Include other questions that come during the method or that were previously created.

8. Allow all teams to discuss questions and re-analyze the case until the topics are exhausted.

9. De-brief the case for the students.

a. This method is exceptionally adaptable, so instructors can de-brief the case in ways that are meaningful in the context and specific environment in which the method is being delivered.

10. Allow for team discussion during the debriefing.

11. Ask the students again if there are any unresolved questions before ending the method.

After the method.

1. Award bonus points to the team that contributed the most to the discussion.

a. Allow teams to vote for the team that allowed for the most strategic insight into the issues.

b. Teams cannot vote for themselves.

2. Evaluate individual student performance and compile student grades based on your notes.

a. Add or detract bonus points.

3. Obtain student feedback.

a. Students can submit feedback immediately or electronically at a later date.

4. Note areas that did not flow smoothly during the method and determine ways to enhance these areas.

Appendix 2. Additional Directions for the Team Based Alternative

Preparation: To best prepare for each case, each member should get a general understanding of the case. To do so, you might consider some of the following questions.

- What organizations and industries/sectors does the case involve?
- Is the organization doing well and how has it performed in the past?
- Look at the development of the organization over time. What strategies has it pursued? Which have succeeded and which have failed? How successful has the organization been?
- What are your initial impressions of the main issues and choices confronting the organization? Is it in an expanding industry/sector, or a maturing one? Are customer needs changing? Does the organization confront a variety of opportunities? Or is there a particular strategic issue that the case is oriented towards?

Re-analyze: Review the case more thoroughly as a team and consider some of the following questions.

- Why was this case chosen at this point in the semester?
- What have been and are likely to be the key drivers of success in the environment that may give rise to opportunities or threats?
- What is the nature of the competitive environment?
- What strategic capabilities does the organization have/lack? Which of these capabilities (if any) have provided the organization with a competitive advantage, or could provide competitive advantage?
- Who are the organization's stakeholders and what are their expectations? Are they aligned? Who has more or less influence over the organization's strategy?
- What are the major issues that the organization's future strategy needs to address?

Further Suggestions: Each team should develop talking points in anticipation of the direction the discussion flows. As you will see below, it is imperative that all teammates participate in this assignment, as the nature of it will not allow one member to simply carry the whole team.

Bonus Points: These are awarded to the team that contributes the most to the conversation in terms of strategic insight. Teams will vote by providing an extensive explanation of why the team they are voting for provided the highest level of strategic insight. Teams may not vote for themselves. Each team is eligible for some points even if they do not obtain the majority of votes.

Caveats:

- Any member of a team cannot have consecutive inputs.
- Each team must sit together with a designation card displaying their team letter.
- Members must be present for entire discussion to be eligible for bonus points.
- If discussion lags, the instructor will randomly choose teams to contribute.

Appendix 3. Implementing the Expert Teams Method

Prior to implementation.
1. Assign teams and provide access to the specific assigned case to each team member OR allow the students to select teams and register for a specific case from the text.
2. Provide instructions (see Appendix 2) for reviewing the case prior to the day of the method.
4. Provide access to all cases used so students are familiar with the content teams will present.
5. Determine if students will be required to bring a one-page (or more) document with questions and discussion points related to each case that the expert teams are presenting.
6. Develop your own questions in case future discussions lag.
7. Develop means to record participation of teams and individual students during the method.
8. Create a means of obtaining student feedback after the method is complete.
9. Remind students to ensure they have access to the case material during the method.

Student preparation.
1. Review instructions provided by the instructor.
2. Read each case used in the activity so that no case is unfamiliar during the method.
3. Prepare a one-page (or more) document with questions and discussion points related to each case that the expert teams are presenting (if applicable).
4. Read and analyze the assigned case by taking notes and grasping understanding of the material.
5. Discuss the case extensively with team members prior to the class meeting.
6. Create a case presentation that follows the instructions presented in Appendix 2.
7. Prepare three multiple-choice test questions based on the information presented in the case.
8. Review instructions again to ensure that the presentation and questions meet all requirements.
9. Make sure to have access to the case material during the method. (This can be a physical or digital copy).

During the team based method.
1. Students were already provided instructions for how the method is going to be completed, so begin by arranging the classroom area into an appropriate space for teams.
2. Provide a blank index card or sheet of paper for teams to write their case names large enough for the instructor and all classmates/teams to easily view.

Instructor requirements.
1. Direct each team to an appropriate table.
2. Ask all teams if they have any last minute questions before beginning the method.
3. Encourage all students to take notes, reminding them of the test questions that each team created based on their presentation material.

4. Keep track of team participation. For example, one member should not always speak for the entire team. Each student in the class is expected to contribute to the overall discussion and presentation equally.
5. Begin by determining an order of presentations.
6. Allow the first expert team to present, keeping track of time to ensure they do not breach 18 minutes, and then allow time for the remaining students/teams to ask questions and discuss the material presented.
7. Allow all teams time for discussion until the topics are exhausted.
8. Ask any further questions not already addressed by the class and stimulate the discussion if it lags.
9. Repeat steps 7-9 until all expert teams have presented.
10. Conclude presentations by discussing strategies, presentation techniques, etc. that stood out to them.
11. Collect the test questions from all expert teams reminding students these may appear on future exams.
12. Ask the students again if there are any unresolved questions before ending the method.
13. Remind students that the test questions will be on their next exam.

After the method.
1. Evaluate expert team and individual student performance and compile student grades.
2. Obtain student feedback: Students can provide feedback immediately after the method or can be sent home with questions that address the effectiveness of the method (paper or electronically).
3. Note areas that did not flow smoothly during the method and determine ways to enhance these areas.
4. Compile test questions for use on the next exam.

Appendix 4. Additional Directions for the Expert Teams Alternative

Case Presentation: The small teams will register for and present a case from the text. The presentation will be18 minutes presenting the basics of the case, outside research, recommendations and solutions, among other information that you choose to include (e.g., incorporate related material from the chapter). After presenting the case, the instructor will engage you in a question and answer session. Students are expected to email the instructor final materials two days before the presentation.

Include visuals: PowerPoint and Prezi presentations are acceptable, but other forms are also encouraged. Be sure to include images and broad talking points but limit the words to the absolute essentials (i.e., talk to us, not read to us).

Summarize/debrief the case and provide additional company research as necessary: Presenters must give a clear and concise summary of the case.

Thoroughly explain the problems that exist: Utilizing knowledge from the chapters, embed explanations with terminology and more objective rather than subjective decision-making.

Explain your recommendations and solutions: Participants should explain courses of action that management should consider and why. Synthesize and integrate information from the text, the chapters, lectures, etc. This is the most important part of the presentation requiring participants to integrate and apply information from the course.

Deliverables: Provide the instructor with all materials two nights before the scheduled presentation. Make sure to Cc all of the team members so all participants know that the materials were submitted.

Test Questions: As part of the presentation, teams will prepare three multiple choice (5 choices) exam questions based on the information in the case. These will be discussed at some point during the presentation, preferably integrated throughout rather than all at one time. One of the presented exam questions is likely to appear on an exam. Exam questions should also be submitted with the other materials two nights before the scheduled presentation also indicating which choice is correct.

Further Suggestions: Integrate the case with the textbook content, encourage some class involvement, have a back-up plan, practice at least two timed trial runs (in our classroom if possible to make sure all media works), keep the workload equal throughout the team, include a short video clip etc.

Appendix 5. Implementing the Theory Based Method

Prior to implementation.

1. Assign a case and provide students access to the assigned case.
2. Provide instructions and requirements for reviewing the case prior to the day of the method.
    a. Inform students exactly what is expected of them in preparation for and during the method.
3. Encourage students to determine potential questions/concerns and share them prior to the method.
4. Develop backup questions to ask students if discussion lags.
5. Develop a foolproof way to record participation of students during the method.
6. Create a means of obtaining student feedback after the method is complete.
    a. This could be a questionnaire, in-class discussion, etc.
7. Remind students to ensure they have access to the case material during the method.

Student preparation.

1. Review instructions provided by the instructor.
2. Read and analyze the assigned case by taking notes and making sure to grasp a complete understanding of the material.
3. Review all models/analytical approaches such as Porter's Five Forces, the value chain analysis, and more that were presented in prior lecture sessions.
    a. Students should have a deep understanding of models/analytical approaches previously covered in the course so they can apply them to the case immediately during the method.
4. Be prepared to apply all models/analytical approaches to the case situation while also coming up with conclusions and recommendations that apply and can be questioned by other students.
5. Be prepared to discuss, question, or even challenge other student responses during the method.
6. Make sure to have access to the case material during the method. (This can be a physical or digital copy).

During the team based method.

1. Students were already provided instructions for how the method is going to be completed, so begin by arranging the classroom area into an appropriate space for the method.

Instructor requirements.

1. Direct students to sit wherever they would like in the newly arranged classroom environment.
2. Ask students if they have any questions before beginning the method.
3. Keep track of individual participation. Each student is expected to contribute to the discussion equally and to be able to elaborate and provide meaningful examples when called on.

4. Begin by calling on a student and asking them to present to the class a full application of any model presented in an earlier lecture session.
    a. Feel free to include other questions here to further engage students.
5. Encourage discussion among participants until the topics are exhausted and thoroughly analyzed.
    a. Again, feel free to include other questions here to further engage students.
6. Move on by asking another student to present an alternative analytical technique or a way that the previous student's response could be improved.
7. Encourage discussion among participants until the topics are exhausted.
8. Repeat steps 6 and 7 until most of the class has spoken, time is scarce, or topics have been exhausted.
9. End the activity with a discussion of the process and insights gained from applying the analytical models.
    a. This method is also adaptable, so instructors can amend discussions to fit the context.
10. Ask students again if unresolved questions remain.

After the method.

1. Evaluate individual student performance and compile student grades.
2. Obtain student feedback: Students can provide feedback immediately after the method or can be sent home with questions that address the effectiveness of the method (paper or electronically).
3. Note areas that did not flow smoothly during the method and determine ways to enhance these areas.