COLLOQUIUM

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# What is the Future of the Case Method in Management Education in India?

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## Executive Summary

This colloquium serves as a conceptual and experiential platform to stage the insights generated on the case method by the faculty who have taught and/or trained at the Indian Institute of Management, Ahmedabad (IIMA). It comprises three sections titled Contexts (including Technology and Culture), Institutions, and Futures. The institutions comprise IIM, Ahmedabad, IIM, Bangalore, and IIM, Indore though the primary focus remains on the curricular and pedagogical innovations at IIMA.

The insights on the future of the case method in India that emerged from the colloquium are the following:

- The availability of information and communication technologies in the emerging milieu is not a threat but an opportunity to reinvent the method; this, however, requires breaking from the 'classical method' in order to innovate.
- The changing demographics of the classroom necessitate a greater appreciation and sensitization to how cultural differences can affect the receptivity to the case method.
- The written analysis of cases (WAC) was and will continue to remain the site for introducing the case method to the incoming students of the Post-Graduate Programme (PGP) at IIMA.
- Communication skills can be taught effectively if a performative dimension is built into the case discussion through role plays.
- Many of the cases used in the IIMs reflect the ethos of a socialist, pre-liberal era of the Indian economy. There is a pressing need to develop cases that reflect the economic developments of recent times.
- The case method will continue to be the mainstay of the forthcoming PGPX (PGP for executives) at IIMA since the greater work experience of the participants will make it possible to combine 'inductive and personalized' forms of learning.
- An examination of the barriers to effective case teaching and writing at IIM, Bangalore reveals that a formal review process may help to increase the standard of cases and teaching notes.
- The institutionalization of the case method in a new IIM requires enormous efforts on the part of both individual faculty (with prior exposure to the method) and the institute as a whole. The learnings from the experiment at IIM, Indore are relevant to understanding what is at stake in the replication of the method in a new institution.
- The Socratic Method is *not* synonymous with the case method; it is not the instructor's task to invoke the dialectical method in response to an 'inner voice,' but an attempt to facilitate the learning process. The method persists despite adverse conditions in many institutions.
- Questions of form remain more important than content in teaching through this method since it helps to negotiate the gap between 'management reality' and 'methodical management.' The method should move from a mere 'post-mortem' of a business situation to a dynamic orientation and facilitate active learning through the realization of the dictum that 'the past is in the present as in the future.'
- The case method will continue to structure the education of managers in the future despite changes in the nature of competition, the organizational environment, etc. However, it may be necessary to supplement the case method with field-based projects to generate the habit of decision-making; this will also make the learning contemporary for the participants.

KEY WORDS

Case-based Problem Solving

The Socratic Method

Decision-making

Methodical Management

Googalization

Culture

WAC

Performing Communication

# INTRODUCTION

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What have we learnt *about* the case method? What have we learnt *through* the case method? Should we attempt to train another generation of instructors in the method? Or, will we discover that the case method has served its time and that we must move on to new methods without making a fetish of the past? What is the future of the case method in management education? What, more specifically, will be its role as a pedagogical tool in management schools in India in the years to come? These are the questions that serve as the *coordinates to the colloquium* on the case method. This colloquium, in other words, is an attempt to take stock and gives management educators in India a platform to share their experiences and learnings on any aspect of the case method that is relevant to its past, present, and, especially, its future.

The two primary issues such as the future of the case method and its role as a pedagogical tool, however, are implicated in several other issues which emerge from the technological challenges and the cultural specificities that the method must grapple with in order to ensure its viability in the years to come. The relevant 'socio-economic indicators' here include the decline of reading as a cultural practice, the growing prestige of technological forms of rationality, the demand for multimedia and/or gaming forms of interactivity, the rise of globalization and the exacerbation of cultural differences in our political and educational lives, the emphasis on communication in both general management and communications-based professions and services, the worldwide proliferation of management education, and the endemic uncertainties in the global economy. The contemporary challenges to the method represented in these emerging contexts, however, are mediated by 'legacy systems' in institutions. So, unless we are sensitive to how these legacy systems have shaped the deployment of the method, we will find it difficult to give a direction to the future that we can envisage for the method. Hence, the contributions to the colloquium are divided into three sections: Contexts, Institutions, and Futures.

> The case method demands that the participant locate himself or herself at a *particular locus in space* and at a *particular point in time* to think through a problem involving decision-making in an organization in the context of a business situation.

Several members of faculty with experience of the case method in management programmes were invited to participate in this colloquium. All the participants were drawn from the IIMs and most are faculty at IIM, Ahmedabad (IIMA) where the method continues to thrive. That a number of professors were willing to respond to this invitation at short notice despite competing commitments is a witness to the fact that despite the intangible, enigmatic, and elusive qualities of the case method, it continues to generate a transferential hold on the *very idea of management education*. It is not surprising then that the case method has become a powerful tool of differentiation for management programmes worldwide. While it is true that most Indian management schools are not yet in a position to deploy the case method widely due to a shortage of trained instructors, its persistence in the IIMs, especially at IIMA, which pioneered this method as early as the 1960s as part of its collaboration with Harvard Business School, is itself worthy of a case study in management education. It is this foundational moment, in itself a mélange of myth and method, that endows IIMA with the pedagogical responsibility to disseminate the case method.

What then is the case method? How is it different from the lecture method? Unlike the lecture method (which is preoccupied with an economic form of knowledge transfer and hence comprehensible within a spatial frame), the case method, almost by definition, demands more since it is *also* implicated in the problem of temporality. It demands that the participant locate himself or herself at a *particular locus in space* and at a *particular point in time* to think through a problem involving decision-making in an organization in the context of a business situation. The situation itself could be of varying levels of complexity and has to be extracted from the case; the contours of the situation are by no means obvious without some analysis. It is not clear, in other words, to the participants at the beginning of a case discussion as to what exactly is at stake in a given situation. The case discussion often reveals that the situation is something *other* than what they might have imagined it to be during individual or group preparation before class. Furthermore, the temporal unfolding of the case through the interpersonal dynamics of the classroom is also an unpredictable process. But, despite the unpredictability of the process, it continues to play a dominant role in management education since it not only imparts knowledge but also helps to facilitate the development of other relevant attitudes, competencies, and skills as well.

> The participants must have an appetite for handling change, uncertainty, and a considerable 'tolerance for ambiguity.'

The method at its best demands not merely intellectual robustness and the willingness to do some homework on the part of the instructor and the participants but also the affective capacity to *contain and work-through* the discussion generated. Even experienced instructors who have taught a particular case on several occasions will find that it is not easy to choreograph a class discussion especially when a contingent encounter with the reality of any concept opens up possibilities that did not emerge in previous case discussions in the class. In other words, the method is not without its demands. The demands are many in number, but, minimally, we must recognize that the emotional labour is much more in the case method for all the parties concerned (other things being equal) than in the lecture method. The participants must also have an appetite for handling change, uncertainty, and a considerable 'tolerance for ambiguity.' The method is both analytical *and* discursive and hence unsettling for those who demand easy answers at the end of a session. It is, to put it simply, doubly demanding, and as the contributors will demonstrate, doubly rewarding. Hence, both academic institutions and non-profit organizations must provide incentives, wherever possible, to encourage the writing of cases and work out the modalities for training employees or participants through the use of the case method.

As indicated earlier, the contributions are set out following the plan of the three sections: Contexts, Institutions, and Futures.

# SECTION I: CONTEXTS

## CASE METHOD IN THE NEW MILIEU: AN OPPORTUNITY FOR REINVENTION

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Today, the case method instructor finds himself/herself in situations that he/she had not faced till a decade ago. The technological environment of the method has changed. The developments in information and communication technologies have made information on the past and current decisions and performance of the companies available at the click of a mouse. Statistical analysis of the information is significantly easier than before. 'Downloads' of analysis of others are easily accessible. Presentation of case analysis can be made more colourful and animated than before. Discussion of cases can be recorded, stored, retrieved, and communicated instantly across geographies. The instructor-participant interaction can take place on a 24x7 basis. The technological changes have induced changes in the participant environment as well. The attitudes, behaviour, and expectations of the participants of both PGP (i.e., MBA) and executive development programmes have changed. So have the expectations from organizations employing these graduates.

> The instructor experiences frustration and excitement simultaneously. Frustration arises from the 'quick fix' approach adopted by the participants to involve themselves in the learning process.

The instructor experiences frustration and excitement simultaneously. Frustration arises from the 'quick fix' approach adopted by the participants to involve themselves in the learning process. The desired involvement of the participants in the method is declining. E-meetings and e-coordination have replaced face-to-face interaction and dialogue. There is a negative tension between the demands of the method and the response of the participants. The instructor is disturbed by 'cut-and-paste' submissions and presentations of others' analysis of the case. The instructor is also disturbed by the increasing use of 'Internet download-based cases' as opposed to 'field visit-based' cases. There is the risk of inadequate development of skills, attitudes, values, and habits for managerial decision-making and action. The method is tending to break down.

The excitement, on the other hand, is from the opportunity to experiment and innovate in augmenting the degree and nature of pre-class, in-class, and post-class involvement in the method. His/her own preparation can be richer with the latest information on the company. The case itself can be developed and made available to the participants differently. Greater complexity can be brought to the class. Live interactions with executives are possible during the session. There is a greater opportunity for coordination and sharing of experiences among colleagues within the business school and outside.

These developments and others that will be discussed here call for a reinvention of the method. The response of the academicians and the educational institutions to the reinvention imperatives would, however, decide the effectiveness of the method in the future. The discussions are based on our experience in handling courses and modules using the case method, coordinating general management competency development programmes for senior and top executives of corporations in India and abroad, conducting case method workshops for management school teachers in India, and informal but involved interactions with colleagues and participants of programmes in India and abroad. We feel that a systematic review of the responses of business schools to the new milieu is called for.

## The Case Method

The case method of learning has been a significant innovation of the Harvard Business School (HBS) to help develop managerial competencies in the participants of management education programmes. The method was developed in response to the question, "How can I bring the 'field to the class' and provide an opportunity to the participants to get involved in 'real-life situations' and learn?" It succeeded by carefully documenting the situations faced by the decision-makers and bringing them to the class. The *greater* emphasis of the method is on developing skills, attitudes, and habits. The managerial competencies that the method attempts to develop are: (a) technical development and the use of tools, techniques, frameworks, checklists, models of analysis, diagnostics, and decision-making; (b) behavioural (managing self and interpersonal relationships for decision-making and implementation), and (c) conceptual (abilities to abstract and see patterns or their absence in multiple developments). The method facilitates the development of competencies by urging the participants to get involved in the decision-making situation. The cornerstones of the method are: the instrument, called the case; involvement of the participants in the instrument; and supporting infrastructure. As the method evolved over the years, each of these stones has been honed and perfected. 'Recommended' structure and processes have been developed for making the method effective.

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### The Instrument

The instrument used to facilitate learning is the 'case.' It describes a *real-life* decision-making situation faced by a decision-maker. The dominant media for presenting the case has been print. The case is divided into text and exhibits. The case writers prepare this instrument in cooperation with the decision-maker and his/her organization. The writers go through various phases like case-lead identification, data collection based on interviews and secondary information search, draft preparation, testing, validation of the draft by the involved parties, and clearance of the case for use in various educational programmes. The discipline of case writing requires that the authors be as close to reality as possible. The *insistence on reality* arises from the need to present to the participants the opportunities to get involved in situations that they might face as decision-makers when they take up regular employment. The hope is that they would have a start-up advantage in their careers.

The cases are inventoried in case clearance houses or published in books or journals. The educational institutions or the course instructors identify the cases that they would use to facilitate the learning from their courses or modules. They also identify the supporting readings that would enable the participants to get involved meaningfully in the case.

## Involvement

As mentioned before, the method facilitates learning by involvement. What is stressed is 'action orientation.' The role of the participants is not that of bystanders commenting on what has happened or what is happening. They have to accept responsibility for their decisions and their consequences. They are required to involve themselves in the method in three distinct phases to develop these competencies. The instructors and the business schools facilitate this by an appropriate choice of cases, readings, assignments, and by providing the supporting infrastructure for preparation and interaction.

## Three Phases

The method involves the participants in pre-class preparation, class discussion, and post-class reflection. There are definitive expectations from the participants and the facilitating instructors in each phase. In the pre-class involvement, the participants are required to go through the assigned case and the readings, analyse the case on their own, and participate in small group discussions. In the in-class phase, the case is discussed. The case discussion progresses from the initiation sub-phase, where a participant or a team of participants presents the analysis, decisions, and action plans, to the build-up phase where the initial presentation is critiqued and alternatives are examined, and finally to the summary and integration phase where the discussion is summarized or integrated with previous discussions and readings are left open-ended. In these phases, the participants and the instructors play multiple roles such as the initiator, the devil's advocate, the listener, the lecturer, and the integrator. The instructor and the participants use the class resources like the blackboard and audio-visual equipment to record the class discussion and relate to it. In the third phase, the participant and his/her team reflect on their involvement and their learning. They develop areas for future action based on such a review. The instructor provides support to the reflection phase by providing end-class questions or interacting with participants after the class.

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## Infrastructure

The method demands infrastructure that provides for and facilitates identification/development of the instrument and involvement of the participants. It also demands that infrastructure be provided to enable the instructors to develop and hone their competencies in handling the method. The physical infrastructure refers to the classrooms and office space that facilitate face-to-face interaction, sufficiently large blackboards for recording of the class discussion, audio-visual aids for projection of pre-prepared material, and cubicles and syndicate rooms to enable individual preparation and small group interaction before and after the class. The infrastructure also includes the office for case purchase, duplication, and distribution. The case method has found the galleried classroom and self-contained syndicate rooms as its fitting infrastructure.

The administrative infrastructure includes office support for issuing guidelines, distributing case material, conducting examinations, holding meetings to decide the schedule, discussing collectively the performance of the participants, reviewing the performance of the programme and the feedback from the participants and other stakeholders. It also includes the support for development or procurement of the case material.

## Structure and Processes

The following is a summary of the processes that have helped to implement the method.

The participants get acquainted with the method through an orientation programme where a case is discussed and the nuances of the method are brought out. The participants are expected to practice the method as they progress from session to session and course to course. The classes are conducted in a galleried classroom that facilitates face-to-face interaction. Even in a flat classroom, the seating arrangement is in a U-shape to facilitate interaction among the participants.

The instructor decides the case mix from the ready repository, books, and journals, and prepares a course pack and intimates the case unit well in advance to enable it to get sufficient copies of the cases and readings and distribute the material to the participants well in advance. The sessions are of 70-90 minute duration. A typical day is so scheduled as to provide time for prior preparation and reflection. The instructor provides the guidelines for preparation. The participants form small groups for discussing the cases and readings before the class. The instructor may form the team. The participants prepare as individuals and meet in a group to discuss the case. At times, the instructor takes rounds to provide support in the pre-class preparation. In the class, the instructor asks one of the participants or a team to initiate the class discussion and carries the class forward. The discussion in the class is systematically recorded on the blackboard. The instructor provides end-class questions to ponder over and leaves the task of reflection to the initiative of the participants. In some cases, the instructor meets the participants individually or in groups at least once during the course.

The learning from the course is integrated in the middle or at the end of the course through a presentation or a review. Cross-course learning is reviewed by the instructor team or the programme chairman/coordinator in the beginning or at the end of the term. The performance of the participants is evaluated continuously. Class participation is evaluated by the instructor and grades are given to individual participants. There are presentations, quizzes, assignments, and sit-in examinations. The instructor provides written and oral feedback on the performance of the participant. In short-duration programmes, the feedback is provided through formal and informal review sessions. The course as a whole is evaluated by the participants through a structured questionnaire at the end. At times, the instructor takes mid-term feedback on the course. Changes in the case and reading mix are made wherever needed.

It is the active involvement of the participant in the learning processes mentioned above and the diversity of the roles played by him/her that decide the nature and extent of competencies developed by him/her. Failure to be involved in one impairs the progress in the other. This demands a discipline of its own. Preference for ready solutions, unwillingness to stretch, pre-deciding relevance, an attitude of following rather than leading, unwillingness to shake one's zones of comfort, and looking for the Guru's wisdom will not result in the desired involvement. The structure and the processes of the method were fine-tuned in the milieu characterized by reliance on print medium, centralized communication, and computing infrastructure. Access to information was limited to school libraries and archives. Participants relied substantially on the business school for information. The responses of the participants to the demands of the method were satisfactory. This milieu is changing. It is characterized by rapid developments in information processing and connecting and communication technologies that are shrinking distances, and bringing people 'face-to-face' from anywhere and everywhere. These technologies are providing access to information, analysis, and images at little or no cost. Changes have necessitated a review of the structure and

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processes of the method, the format of the instrument, and the infrastructure itself.

## New Milieu

The salient features of the new milieu are:

- emergence of a new body of practice of management in response to pressures of globalization and competition by adopting the latest in management theory
- faster and cheaper availability of global information, images, and sounds at the click of a mouse
- mobile technologies that make interactions and computations possible from anywhere and everywhere and at any time
- enthusiasm among educational institutions and corporations to place significant information on the Internet and make it available to all at the least or no cost
- development of fast search engines that makes searching the Internet easily and cheaply
- easy and affordable recording, storing, and instantaneous retrieval of data, voice, and images
- enhanced opportunities for collaboration in developing content and delivery and independent opportunities to the participants to search and obtain the needed information
- emergence of new types of entrepreneurs and the creation of attractive placement opportunities
- arrival of a new generation of MBA participants fed on Internet chats, downloads, interactive computer games, home delivery, fast food, and entrance examinations for professional education
- arrival of a new generation of executive education participants fed on performance appraisals, 360 degree feedback, six sigma belts, theory of constraints, and core competencies
- increased demand for 'ready to see and experience' products and services by the participants.

Uncertainty in the class has increased. Uncertainty is with respect to the genuineness of the preparation and class participation, the sincerity of the assignment submission, and the extent of post-class reflection.

Interaction with instructors and participants point to the impact of the developments on the effectiveness of the method. Colleagues are disturbed by the breakdown of the 'discipline of the method.' They recollect the 'good old' serious days when the participants were totally devoted to learning from the method. They prepared well. The class discussions were fruitful and there was a sense of fulfilment. Uncertainty in the class has increased. Uncertainty is with respect to the genuineness of the preparation and class participation, the sincerity of the assignment submission, and the extent of post-class reflection. Some point to the way the classes are collapsing as the participants download the ready analysis and present it as if 'it is their own.' Alternatively, there is the cut-and-paste practice of developing the project report. They are undermining the involvement in the three phases of involvement. They also challenge the instruments of evaluation like submission of case analysis, presentation of analysis in the class, group tasks reports, and learning diaries. The attention span of the participants has declined and there is a tendency to withdraw from active engagement in the class discussion and adopt a 'let us finish this at the earliest and hit the Net to know the latest' approach. This shifts the focus more to 'knowledge transmission.'

The interactions with colleagues and participants also point to the new possibilities with the method in the new milieu. The case itself can be presented differently. Greater complexity can be brought to the decision-making situation through the use of images and sounds. Faster statistical analysis, organized presentation, accessing information on companies from the class itself, and better coordination in the learning process are pointers to the opportunities created by the milieu. Innovations and experiments are possible to involve the participants totally in the method.

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## New Situations

The following presents an indicative view of the new situations in which the instructors find themselves in the changed milieu.

### *Let Me Make My Booklet*

"Can you distribute the course CD instead of the booklet? Send it as early as possible. Also let me have the list of useful websites. Let me make my booklet as I deem appropriate." These are some unusual requests made to the instructor who is used to distributing the cases and readings in a book format. Earlier, he had not provided flexibility in mixing and matching the readings with others. Everything had to be printed and packed at the business school case unit or at the printer's premises.

### *Reading is Boring*

In an executive education programme, the instructor was upset that the class had not read the case. The case had 25 pages with seven exhibits. Before giving time to the participants to read the case, the instructor enquired what happened. The following was the response of one of the participants:

> At this age I am too bored to sit down and read such a long case. Can you make reading a pleasure? Can I listen to the case rather than read it? Can I get a feel for the product being produced? Can I see the layout of the plant being redesigned? Can I sense the resistance to change by feeling the emotions of the people involved?

A different request has been the demand for cases that have graphs, exhibits, and diagrams in colour.

A variation of this bored reader is the comment that it is too monotonous to read printed pages day after day and month after month. The novelty with the concept of the case and the case method wanes as the participants progress from one term to the next. This builds monotony and makes the participants avoid getting involved before the class or adopt short-cuts.

"Why have you not read the case?" asked the instructor. "I began with the intention of reading the case but got absorbed in the information on the company and industry I collected from a Google search," was the response. Satisfying curiosity has become primary and getting involved in the case and thinking through the situation has become secondary.

### *We are Not Here to Enter Data*

The instructor was upset that the class had not worked out the numbers. There were opportunities to develop insights into the company's performance by cross-linking the exhibits. On enquiry, a participant demanded: "Can I get the exhibit in Excel sheets so that I focus more on analysis than on entry? Can you distribute a pre-analysed exhibit so that we focus more on inference building and decision-making rather than on working out the numbers?"

### *Googalization*

At the end of a written assignment, the instructor discovers that the 'submission he liked the most' was a download from a website. The participant had downloaded an already existing analysis and put his name in the submission. 'Google' facilitates the search for the 'analysis' in the shortest possible time. This facilitates the participant to 'adopt' quick means to success. He/she takes risks and hopes that the instructor or the teaching associate will not find out. It might get a grade but it harbours unethical practice and questions the 'value orientation of the participant.' When caught, the participant pleads for mercy or feigns ignorance and productive hours are wasted in arguments, counter arguments, and enquiries. Another impact of googalization can be seen in the following situation:

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Easy availability of information on the Net has led to a tendency to 'put together' cases. 'Googalized' information is woven around a 'semi-real' issue. While this serves 'the narrow class purpose,' it does not enable either the instructor or the institutions to get a 'feel' for the field.

### *This Case has Become Redundant*

The instructor began the class by asking the question, "Should we acquire this company?" The whole class argued for taking over as the participants had found out from the Internet sources that the company had already been acquired. This upset the learning purpose of the class. Despite the instructor's effort to look at the other option, the class refused to carry the discussion forward. Publicly available information had made the case preparation and discussion biased. There was a 'switch-off' before the class making the case redundant. Redundancy happens when participants get computerized access to earlier class analysis. In the earlier milieu, tracking this kind of information was difficult and time-consuming. The participants concentrated on the case and used the information available in the case to make up their minds. Divergence in analysis and decisions thus led to a meaningful debate in the class.

Not only the case but also the reading material becomes redundant. The participants are frustrated that old reading material is assigned to them when the latest can be downloaded from the Net. Similarly, they point to the inadequacy of the course outline by comparing the outlines of other business schools. The participants, at times, offer to help download the latest cases and readings from the Net.

The redundancy dimension has put pressures on the instructor and the business schools to review the curriculum continuously, stay current, and develop new cases.

### *Low Stretch*

Competition in the class is not on the stretch of the evidences in the case but on sharing data/analysis downloaded from various websites. The short-cuts become a need to save time for other 'interesting' activities rather than sitting down with the case and readings and struggling through the situation. The perception that 'short-cuts do not matter' or a 'good grade' does not matter is reinforced by the lack of rigorous evaluation by the employers. Everybody is well placed. The proliferation of employment opportunities has arisen from the impact of the new technologies and the consulting opportunities thereby created.

The frustration of the instructor is in seeing that the old case analyses are easily available to the participants. Some participants just change the name and submit. The instructor and WAC (Written Analysis and Communication) reader's role is reduced to that of a policeman. 'How do I prevent them from hitting the Net?' becomes the concern. Can the concern be shifted to 'how do I facilitate the best use of the Net and enhance the worth of my assignment?'

### *Group Work as Compliance*

Debates and discussions within the group have been replaced by 'search individually and patch collectively' process. The work is pushed to the end. The instructor is forced to play the policing role. The same reports get submitted in multiple courses with small changes here and there.

### *New Competition*

In the executive development programmes, the instructor may confront the following: "Do not repeat what the author has said." In one of our in-company HRD seminars, we had an online chat with the author about his value addition. In the same format, the participants pointed to the live interactions with the authors when they attended a training programme in another business school. They shared the insights they had obtained from this interaction. They also suggested additional website sources to enable the instructor to update himself/herself and add value.

The emphasis in organizations is on staying up-to-date with the latest management thinking and taking initiatives on their own to respond to this. The initiatives have been in-house seminars by leading authors, involvement of international consultants in conducting in-house workshops, and providing online access to business magazines and business school publications.

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The instructor also finds that the 'practice' is significantly ahead of the frameworks and theories being discussed in the class. There is a large body of 'practice exposure' available in the class. The new competition has put pressure to develop the value adding capability of the instructor and the business school and doing the needed homework before the commencement of the programme to identify collaboration possibilities within the class.

### *Response*

The method as practised in the old milieu finds itself at the crossroads. The competence development thrust of the method is suffering and the method is likely to get reduced to a 'farce.' There is the danger of 'pseudo learning.' The participant gets the grade but there is no learning. How do we respond to these challenges and enable the method to deliver? The current response has been 'disciplining' and initiating measures to enforce the requirements of the method. This has taken us on a punishment and policing mode: Make vigilance tighter, award stricter grades, show your anger and walk out of the class, develop software to check 'cut-and-paste' or restrict access to the Internet, insist on written submissions or have more in-class examinations as opposed to take-home or increase the number of assignments and make the schedule tighter. To us these are not sustainable solutions. *The greater the role of policing the further the breakdown of the method.* The method itself needs to be reinvented by recognizing the opportunities provided by the new milieu. Are there opportunities?

> The milieu has opened up opportunities for collaboration with other educational institutions in case testing, sharing feedback on the draft case, and exchanging notes on case analysis and case discussion. Collaborations are also possible with industry.

## Opportunities

The new developments not only provide opportunities to respond to the new situations but also help overcome some of the *rigidities and compromises* imposed in the old milieu.

### Greater Flexibility

The new milieu promises greater flexibility to the instructors and programme managers. Earlier, the method relied significantly on the 'written word' and face-to-face interaction. There were situations where the left hand did not know what the right hand was doing. The discussion in one class could not easily be shared with colleagues. Participants could not keep in touch. Regimentations were in 'fixed consultation hours' and pre-specified discussion hours before the class. As the lead time needed for duplication and distribution was longer, there was limited flexibility in changing the content mix. The course, at times, became rigid. The developments provide for greater flexibility in interacting with the participants, preparation and distribution of the instructional material, and sharing experience with colleagues.

### Making the Left Hand Know What the Right Hand is Doing

In the absence of developments seen in the new milieu, instructors and the programme managers depended on formal meetings or informal interactions to know what is happening in other sections and other courses. At times, these mechanisms tend to break down. The participants had to live with duplication of cases and prescribed readings. It is now possible to keep track of what is happening where and alert the instructors and managers through a 'knowledge management system' that keeps a record of what is happening in which part of the programme and make it available wherever required. Integration within the programme is effective and the value of the programme is enhanced.

In the new milieu, it is possible to share notes and coordinate team teaching projects. It is also possible to know what is happening in the other session and courses and avoid duplication. Earlier, there were communication gaps and the cases were repeated. In the new milieu, we can create an easily accessible common pool of experiences. It is possible to eliminate duplication by design.

### Collaboration Opportunities

The new milieu has opened up opportunities for collaboration with other educational institutions in case testing, sharing feedback on a draft case, and exchanging notes on case analysis and case discussion. Collaborations are also possible with industry. Executives can intervene in the discussion and offer their opinions on choices made even while they are away from the class. Their involvement is necessary to alert the participants to the behavioural consequences of their recommendations.

### More Effective Preparation Possibilities

The instructor's own preparation is enhanced by the new milieu. His/her own access to information on the company, industry, economy, and experience of colleagues has increased not only at home but also abroad. Sitting in India, he/she need not visualize the 'Wal-Mart' supermarket based on printed pages to teach the Wal-Mart case effectively. He can 'Googalize' himself/herself and have a virtual tour of the supermarket to get a feel of its operations.

He/she can be a part of a case teaching community and get helpful hints to prepare for and facilitate the learning from 'complex cases.' Given the multimedia mobile technologies, it is possible to record impromptu and bring live situations to the class with little or no effort.

### Alternative Case Formats

We should be able to develop cases using multimedia opportunities and provide alternatives to the print version. It is possible to build voice, images, and text in the case and enable the participant to get involved totally. The participant can save his/her time in comprehending the case and use the remaining time in analysing the situation, again using multimedia, and then come to a decision.

The involvement in the company could be arranged through video-conferencing and chatting opportunities. The participants can comprehend the case in the 'question and answer mode.' In this format, they get the next part of the case or the exhibit only if their analysis and comprehension of the current part of the case is appropriate. The questions posed by this format are: How do we provide time for this? What is the supporting infrastructure?

There could be a half case. Part of the case could be presented and the rest of the details have to be filled in by the participants by research. The participants get information from the organization on the basis of questions raised by them. In the class, they compare their information and share their descriptions of the situation and the analysis. This would provide an opportunity to get a feel for the unstructured situation. The organizations can react to the efforts of the participants in collecting the data and decision-making.

### Blackboard Recollection

In the case method, the blackboard plays a major role in recording and prompting the progress of the class discussion. The instructors prepare a blackboard plan as a part of the class strategy. After the session, they review the development of the board and make their own notes on the performance of the class strategy. In the old method, the instructor recollected the development of the class board and reflected on what happened in the class on a particular day. Alternatively he/she would ask the teaching associate to record the deliberations. Some business schools used electronic boards that allow the instructor to take a print-out instantly. This was expensive. It is now possible to take a snapshot of the board with a digital camera and present it to the class the next day. Alternatively, the instructor can use the Excel sheet as the board and keep entering. Of course, this calls for proficiency in keyboard management.

The new milieu provides opportunities for developing instruments that use multiple media and place a more complex situation in the hands of the participants.

### Bringing Greater Complexity to the Classroom

The way the method developed — the cases in print mode, limits on the number of pages to facilitate reading within a given time limit, and less structured exhibits — tended to simplify managerial complexity. It was criticized for providing an inappropriate view of reality to the participants. The new milieu provides opportunities for developing instruments that use multiple media and place a more complex situation in the hands of the participants.

### Providing Support at the Pre-class Stage

In the old milieu, unless the participants were involved in a fully residential programme and the instructors were also on the campus, it was not possible to provide support to the participants and their teams while they were preparing for the class. Avoidable anxieties and traps of superfluous work, especially in the early stages of the programme, could not be taken care of. This used to lead to 'too many waking hours with no substance gained' impressions. The participants relied on the informal network of their seniors to sort out the issues. This favoured some but not others. It is now possible to create a 'help desk' and make the preparation more meaningful. The participants could consult the desk and progress on the basis of 'go-or no-go' gateways. The instructor can also intervene selectively and monitor the preparation process. It is possible to be 'present' in each discussion group without physically being there.

### More Involved in Class Dynamics

It is possible to provide for greater interaction in the class. Routine computations can be seen through Excel sheets and discussion could be on inferences and decisions. The consequences of decisions or evaluation of alternatives could be made more meaningful through quick 'what-ifs' and 'goal-seeks.' This used to be a Herculean task in the old milieu. Multiple 'what-if' scenarios could be thought through and the consequences of decisions can be seen. Even a live interaction with executives could be organized. Role plays could be more forceful through recordings. Impromptu recording of the discussion and playback is also possible. Given the handycams and other hand-held gadgets, it is possible to record on the spur of the moment and playback or take it home for 'review and reflection.' Earlier, an independent classroom was to be earmarked for recording sessions. This restricted the flexibility of the role plays in the case situations.

### Mass Customization

With increased pressure on finance and the imperatives to be financially self-sufficient, many institutions have increased the size of the batch and the sections. This has meant decreased attention to individual participants and the promotion of 'switch-off.' Is it possible to touch base with all through e-mail and other formats of interaction and provide feedback on their involvement in the method and their response? In the absence of feedback, the learning of the participants would be impaired. Alternatively, he/she might make his/her own assessment on what needs to be done to 'stay in the system.'

Technology makes it possible to mass-customize the interaction and feedback processes. It should be possible to track the performance and interaction of the participants in various phases of the method and build a customized participant relationship management. It is also possible to develop the profile of each participant as he/she progresses from session to session and course to course and provide feedback and suggest measures for intermediate corrections. It is possible to track the participant's development of competencies by pooling the comments of various instructors on the participant's progress and provide opportunities to address the weak areas. In the old milieu, the comments of the WAC instructor on the participant's submission and his/her recommendations for improvement were not known to the instructor of, say, the marketing course which also uses the 'problem solving' approach recommended by the WAC instructor. It is now possible to pool this in a 'participant's knowledge system' and enable the marketing instructor to touch base with the same participant and reinforce the learning. A continuous feedback on the participant is possible. Informed decisions on participants can be taken based on this. This would be a better alternative than evaluating the participant on the basis of letter grades and in deciding to keep them in the school or throw them out.

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## An Agenda for Reinvention

The new milieu makes it imperative to reinvent the method. There is a case for liberating the classroom and corridor-bound method. We need to rethink the format of the instrument, the mechanisms, and the processes for involvement. We need to sustain the developmental role of the instructors and the institutions and minimize the policing role. Analogously, we have to increase the thinking and the discursive role of the participants and reduce the pure 'downloading' role. The following are the indicative items on the reinvention agenda. The agenda poses several questions for deliberation by members of academia and industry.

### A Broadband of Innovations and Experiments

*We need a clean break from the classical method.* There are incremental innovations around the existing approaches. A broadband of innovations and experiments have to be initiated around the instrument, involvement processes, and the infrastructure. The innovations could be at the levels of programmes, courses, modules, and sessions. Experiments are needed to build alternative competencies of the instructors and their associates to handle the new technology basket creatively.

The regimentation of one session for one course on a given day may have to be rethought. Experiments in building flexibility in the schedule to accommodate sessions of varying duration need to be initiated. Today, technology provides opportunities to handle the co-ordination challenges posed by these experiments.

> The class format that facilitated face-to-face interaction and recording on the blackboard is not adequate to respond to the new needs. We need facilities for using all the media simultaneously.

### Borrowing from Other Professional Schools

The inspiration for the original innovation was the law school. With the multimedia orientation, it is possible to examine the pedagogies developed by other schools that train professionals like designers, actors, and drama directors. What are the possibilities? What are the adaptations needed to revive the method?

### Partnerships and Collaborations

This aspect is more relevant in the context of executive education where the participants at times have more information than the instructor. How can we collaborate with the participants in co-designing the learning opportunities? Similarly, partnerships are possible in developing the cases across business schools, testing them together, and sharing experiences on case teaching. One can create a 'community of case method practitioners and keep track.' Co-coordinated discussions can happen across programmes in different geographical settings. Industry can get involved actively in supporting this. How do we make this happen in a sustainable way?

### Infrastructure

The class format that facilitated face-to-face interaction and recording on the blackboard is not adequate to respond to the new needs. We need facilities for using all the media simultaneously. The questions are: Can we store what is written on the board for later use? Can we get in touch with the company executives or visit the company sites while the class is in session? Can we check a reference in the library from the classroom itself? If the same case is being discussed simultaneously in two different locations, can we exchange notes during and after the discussion? Can we record impromptu the class discussion or the role play? With the cost of technology coming down, each class can be equipped with all the gadgets. The class needs to be redesigned to facilitate simultaneous access to all the media.

The infrastructure for the distribution of instructional material needs to be rethought. The burden of making copies and distributing at an appointed time can be done away with. Should it be distributed so well in advance? Can the participants draw what they need from a virtual source? Can there be a filter in terms of the analysis needed to receive the next pack? Can it be linked to preparation for the class? Reinvention would help in responding to the queries.

### Learning and Unlearning

The reinvention effort has implications for the way the instructor and his/her team of assistants equip themselves to respond. They need to develop comfort in handling diverse gadgets in the class and mix and match them appropriately for their sessions and courses. Their class strategy needs to look at the role of technology in the class. How do we change our style of 'court marshalling' or 'board management?' What do we continue and what do we discard?

As we benefit from the new technology, there is a need to rearticulate the discipline of the method in terms of self-preparation, active involvement, and reflection. There is the risk of getting lost in the multimedia. The reinvention requires that the instructor spends time on new tasks and competence building. How do we release the time of the instructor to concentrate on post-class and pre-class monitoring and feedback? What can be the modifications in schedules and work routines?

### Role of Institutions

The reinvention of the method means that the current instructors have to unlearn and relearn. What role can institutions play in facilitating the transition from 'competencies for the old milieu method' to the new ones? How do we facilitate unlearning? What are the mechanisms for facilitating this? How can institutions create an environment for facilitating unlearning and relearning by the current instructors? How do they induct the new instructors into the method in the new milieu? What are the opportunities for experimenting and building competencies? Should it be done by the instructor on his/her own or should there be a collective effort? How can the institutions facilitate this? Can there be an action research project around this?

## IMPLICATIONS OF CULTURE ON TEACHING AND LEARNING THROUGH THE CASE METHOD*

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The case method of instruction and learning has now been recognized as an important pedagogy in teaching management today. Cases are developed to depict the dilemma of decision-making, giving the needed 'facts' and 'data' that would be needed to make the decision but avoiding value judgments of the case writers themselves. The idea, now expressed as a standard footnote in the opening page of each case, is not to illustrate 'correct' or 'incorrect' handling of the administrative or managerial situations by the executives actually faced with the situation, but rather put the participants back to that point of time before the decision was taken to help generate options and implications and arrive at *their own* decisions. By stating their decisions and defending them, after the application of the relevant theoretical concepts, it is expected that participants would gain a better understanding of the issues involved, analyse the use as well as the limitations of applying a theory to a practical situation, see multiple points of view and perspectives, and thus arrive at better decisions. What actually were the decisions taken by the executives are never given in the case and, as a general rule, not discussed in the class.

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Pioneered at the Harvard Law School in 1871 and adopted by the Harvard Business School (HBS) in 1924, this method has since been in use in many other institutions in different countries with widely different cultures such as in Switzerland, France, India, the Philippines, and Nicaragua. But it appears that the questions of whether the case method, which was developed in the US would be equally effective in other cultures, and, if not, what would be needed to bring about changes in teaching and learning methods to increase the effectiveness of the sessions have not received much attention. Hence, we seek to explore the following questions:

- Is the effectiveness of the case method culture-dependent? If so, how?
- What would be the implications for teachers and learners if it were culture-dependent?

### The Case Method: Essential Features

The first feature of the case method is that almost all the discussions on a topic in a session are conducted with reference to the case itself; theoretical concepts, when discussed, are only those that can be linked with (or are relevant to) the case. Hence, a case discussion cannot and does not cover all aspects of the theory on any topic;

*Note. A different version of this paper was presented at the Academy of Management Annual Meeting in Honolulu, August 2005.

it covers those particular aspects that are applicable in the case and emphasizes their application in the given situation. Thus, there is a sacrifice of breadth in favour of depth and application, though in the hands of an expert teacher, the nuances of theories can be explored and interesting insights derived.

The second distinctive feature of the case method lies in the nature of its discussions. The lecture method is highly instructor-centred; even methods such as simulation are quite instructor-centred when it comes to the interpretation of the experience. In a case discussion, the instructor's role is to facilitate a discussion that mainly takes place among the participants themselves. Thus, the instructor does not *direct* a discussion to reach a pre-selected solution; he/she merely facilitates the reaching of some alternatives by the participants.

A third feature of the case method is the ambiguity it forces participants to live with. In contrast to the lecture method, in which the instructor presents frameworks and concepts with an air of finality; in the case method, there are no right or wrong answers (as it is indeed the case with real-life situations). And, at the end of a discussion, the instructor still does not say what is the 'best' or even a 'better' answer. It, therefore, leaves a great deal of ambiguity at the end of a discussion.

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A fourth feature of the case method is the responsibility it places on the students to learn in their own way. Typically, a case involves considerable preparation; the responsibility for the preparation and learning is squarely on the participants both as individuals and as a group. If the discussions do not go well due to lack of preparation, the instructor may not be able to salvage the situation as can be done in the case of other teaching methods.

We now explore how these features are culture-dependent.

## Dimensions of Culture

The term 'culture' refers to a collection of the pattern of thinking, feeling, and relationships in a society that is subject to certain norms and values in that societal context. Hofstede defines culture as "the collective programming of the mind that distinguishes the members of one group or category of people from another" (Hofstede, 2001[1]).

Culture has been studied from different points of view and paradigms. We adopt the five dimensions identified by Hofstede (1980,[2] 2001) in his pioneering work: power distance, individualism/collectivism, masculinity/femininity, uncertainty avoidance, and long-term/short-term orientation.

Power distance refers to the nature of dependency relationships in the society/country. Applied to classroom situations, it translates into (i) a certain distance the teacher is expected to have from his/her students; and (ii) distance among participants (especially in executive development programmes) depending on their age, rank, and status.

Individualism/collectivism refers to the extent to which a culture encourages its members to look after themselves or remain integrated into groups. It involves sacrificing some individuality for the group, caring for the group members, and mutual support. In classroom situations, it translates into the extent to which participants form a group whose views are more important than those of the individuals themselves. With a high 'group' feeling, the participants may like to support each other's arguments, instead of engaging in a debate, and be reluctant to oppose or criticize a colleague. It may also apply to subgroups within the class such as study groups.

Masculinity refers to qualities such as aggressiveness, competitiveness, seeking after material success, and proclivity to exert power as compared to tenderness,

[1]Hofstede, G (2001). *Culture's Consequences*, Second Edition, Thousand Oaks, CA: Sage Publications.
[2]Hofstede, G (1980). *Culture's Consequences*, Beverly Hills, CA: Sage Publications.

cooperation, and seeking softer values in life. In classroom situations, it could translate into dominating the discussion, engaging in ruthless cutting down of another argument, and actively trying to get the attention of the instructor. Winning arguments would be considered as indicative of the 'executive potential' of the participant, and even if other points of view are listened to, it could be with a view to making counter-points aggressively.

Uncertainty avoidance refers to the extent to which a culture programmes its members to feel either comfortable or uncomfortable in unstructured situations. In some sense, it refers to a preference for clear-cut solutions to open-ended solutions; it refers also to the extent to which a complex situation is reduced to a very simple framework (the ubiquitous 2 x 2 matrix) and using this in very different situations. In classroom situations, it could be the reluctance or readiness of participants to recognize that a problem could have multiple solutions, each appropriate in its own way not only to the context but also to the personalities involved.

Lastly, we have the long-term/short-term orientation. This refers to the extent a culture programmes its members to accept delayed gratification of their material, social, and emotional needs. In classroom situations, it would refer to the propensity to look at long-term implications of a problem as opposed to short-term implications and also convert concrete problems to more abstract problems applicable in a longer-term.

We shall now try to see how these cultural features could affect the teaching/learning through the case method.

The case method is essentially a democratic method. In a culture with high power distance, teachers are *expected* to adjudicate, give his/her own 'answers' to the issues (and give these answers a degree of finality), and steer the discussions to a pre-determined conclusion. A teacher who lets others speak a lot may be seen as weak and ineffective or even as not very knowledgeable.

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As Gragg observes, "Teachers, particularly those unused to the system, sometimes find it straining to leave their safe haven of dogmatism and meet their students in a democratic plane" (Gragg, 1954[3]). We may also expect teachers' views to be questioned to a far less degree in high power distance cultures.

### Individualism vs. Collectivism

Since the case method imposes a need for group work, dependence on others for one's academic performance is a part of life and this may be highly unsettling in individualistic cultures. In collectivistic cultures, on the other hand, a very high sense of group affiliation is likely.

Such a strong sense of group affiliation, however, may encourage individuals to suppress the expression of their own personal points of view in favour of that of the groups. There may also be a greater reluctance to enter into an argument with a co-participant lest the latter's feelings be offended. A participant may be more inclined to say, after a brief argument, "OK, I agree" or simply not to press his/her point beyond an early stage. In individualistic cultures, on the other hand, despite strong group affiliations, individualistic opinions could still be expected to be dominant.

### Masculinity

In more masculine cultures, competitiveness and aggression are valued; in feminine cultures, they are discouraged. In case discussions, usually, there are evaluations of class participation but this in itself may not

[3] Gragg, Charles L (1954). "Because Wisdom Can't Be Told," in McNair, MP and Hersum, AC (eds.), *The Case Method at the Harvard Business School: Papers by Present and Past Members of the Faculty and Staff*, New York: McGraw-Hill.

result in aggressive or competitive class discussions. Of course, there will always be people who participate more but even they may be reluctant to be seen as aggressive and competitive. This may not be the same as that resulting from collectivism: even in a new class such as in an executive development programme, aggressive participation may still not be there.

### Uncertainty Avoidance

Uncertainty avoidance (or intolerance to ambiguity) is a crucial determinant of the quality of a case discussion. Cases are usually open-ended and highly ambiguous. As Prof. Dewing of HBS put it, "There should not be a single problem in use which is not capable of at least two intelligent solutions, and it would be surprising if any group of experienced businessmen could offer an unequivocal solution with unanimous accord to any one of them" (Copeland, 1958[4]). There are no 'right' or 'wrong' answers to the decision issue posed; there can only be pros and cons of the different options.

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This may lead to a feeling of not having 'adequate data' — hard, quantifiable, unambiguous data — in the case to make a 'clear-cut' decision. The important point of this is the degree of comfort or discomfort at the end of the class on the finality of the decision outcome that emerged. According to Dunn (1954)[5]:

> The student under the case method must develop the art of floundering gracefully in this uncertainty. He must ultimately come to enjoy or at least to live at truce with uncertainty, or the case method will be unbearable for him. Not all students are emotionally constituted to accept this floundering and uncertainty. The psychology of some men drives them to seek surety and shun doubt. Such men, in my observation, seldom make successful case method students.

To overcome this discomfort (and perhaps to get good feedback), the instructor may resort to devices such as (i) informing the class what the actual decision by the company was; (ii) summing up in such a way as to give a better weightage to one particular decision; (iii) giving his/her own analysis and conclusion, etc. Whatever be the disclaimers, these tend to enhance the credibility of particular decisions.

### Long-term vs. Short-term Orientation

Many cases involve a trade-off between long-term/short-term measures. One objective of a case discussion could be to enable participants to appreciate the implications of this trade-off. All the same, the cultural propensities may induce participants, on the whole, to prefer long-term or short-term solutions and the instructor may also be supportive of this choice. We recognize the difficulty in studying this problem distinguishing between true cultural effects and conditioning induced by the institutional structure in the country. For example, a system (as in the US) of stock markets watching quarterly results and equity analysts valuing stock on short-term measures may condition participants (especially if they are experienced) to see such measures and results as critically important; this may have little to do with culture as such. However, these two factors could be less intertwined if the participants are fresh from college or have only a limited work experience.

Following the learning model proposed by Kolb (1976)[6], we can expect that participants from cultures of long-term orientation would adopt a model of abstract conceptualization and be more interested in the development of a theory that applies to a larger variety of situations as compared to a 'here-and-now' culture that treats a problem as done once it is over with. People with long-term orientation can also be expected to delve into the theoretical aspects of a problem in much greater detail as compared to those with short-term orientation. As we have noted, the case method is short on theory

[4] Copeland, Melvin (1958). *And Mark an Era: The Story of the Harvard Business School*, Boston: Little, Brown&Company.

[5] Dunn, Albert H (1954). "Basic Characteristics of the Case Method," in McNair and Hersum, *op. cit.*

[6] Kolb, D A (1976). *Learning Style Inventory Manual*, Boston, MA.: McBer & Company.

development as compared with the traditional methods.

Hence, it is to be expected that participants from cultures with short-term orientation will be more dissatisfied with the learning of theory under the case method as compared to those from cultures with a long-term orientation.

## Conclusion

The need to be sensitive to the cultural context while conducting a case discussion cannot be over-emphasized especially for teachers teaching in multiple cultures and for participants being taught by teachers from different countries. Having taught for a number of years through the case method, I have been struck at the difference in the way case discussions are supposed to go in the US and the way they go in India, irrespective of instructors. Yet, with progressive globalization of schools and with more and more students taking part in exchange programmes, case teachers need to recognize the impact of the culture of the participants on the way case discussions need to be conducted for maximum effectiveness. The consequences of a lack of appreciation of the cultural background of the participants and the teacher may lead to a reduction in class effectiveness, frustration on the part of the teacher as well as the participants, and a loss of learning. Lack of a summing up giving the teacher's own point of view may, for instance, deeply jar participants in cultures of high uncertainty avoidance and high power distance and participants may feel that they have learnt nothing, while doing the same thing may stimulate examination of alternate view points and courses of action, and the possible consequences. Incomplete discussions on theory may leave participants with a feeling of having been cheated out of knowledge. The effects of these may be especially severe in short-term programmes such as executive development programmes where participants have no time for understanding other assumptions and points of view or for corrective action.

The consequences of a lack of appreciation of the cultural background of the participants and the teacher may lead to a reduction in class effectiveness, frustration on the part of the teacher as well as the participants, and a loss of learning.

Lacking cultural appreciation, the teacher may initiate remedial measures that may make matters worse. The participants, for example, may be forced to take their positions more clearly but without any inputs from the teacher as to which of the positions is 'preferable' and they may feel worse at the end of such a session. The teacher, with his/her own beliefs about teaching, may find it difficult to satisfy the participants' demands.

The second implication could be on the types of cases that would go better with some cultures. For example, highly ambiguous and open-ended cases may not go well in cultures of high uncertainty avoidance; descriptive cases that highlight the 'lessons learnt' that are amenable for a much better consensus could go better. Cases that may necessitate taking stands on ethical issues or those involving values may find the participants in a bind on taking such positions in highly collectivistic cultures. Similarly, in cultures with short-term orientations, cases involving 'here-and-now' decisions would be better than those involving long-term implications.

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The third implication could be on the case writing efforts to be made by institutions in different cultures. This follows from the argument in the previous paragraph and would imply the development of cases that are likely to go better in a given culture.

Finally, students from other cultures could be given counselling sessions on the way case discussions are conducted in a different culture and the way they should integrate into the class discussions to make themselves more effective.

Thus, appreciation of the cultural aspects of a classroom can make both teaching and learning through the case method more effective.

# SECTION II: INSTITUTIONS

## WAC AND THE CASE METHOD

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In 1964, IIMA adopted the case method from HBS. WAC (Written Analysis and Communication), like other Post-Graduate Programme (PGP) first-year courses, received its substance and form from HBS.

### At HBS

At HBS, the WAC course was then known as Written Analysis of Cases. It was earlier known as Business Problems Analysis and later as Elements of Administration – General. WAC at HBS, therefore, was an extension of the first-year course in general and the case method in particular. The emphasis in other courses was case discussion, but in WAC it was on written analysis. The sum and substance of other courses and WAC was one and the same — case analysis.

### At IIMA

IIMA first copied WAC from HBS in 1964 with the title of Written Analysis of Cases. This was later named as Written Executive Communication. Finally, in 1969, the Courses Review Committee accepted the title of Written Analysis and Communication — a name that continues to remain till date.

The main reason for the change in the title was to add the dimension of communication. The course adopted a twin focus:

- to sharpen analytical skills in managerial decision-making situations
- to improve written communication skills.

WAC remained a skill-based course. It did not cover traditional communication concepts. It was also *not* considered a course for improving linguistic abilities, descriptive essay writing skills or creative writing skills. The participant was assumed to have these skills even before the course started.

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It focused on developing logical thinking and skills in writing. These skills were needed in other courses for acquiring skills in substantive areas of management. In turn, the tools, techniques, and knowledge acquired in other courses were used in WAC to analyse management situations. WAC also provided an opportunity to integrate skills acquired in the context of specific functional courses into those of general management.

The distinctive features of the course were that it required the participants a) to come out of technical jargon and communicate with generalists, and b) to adhere to the discipline of word and time limit.

The course content was spread from single-function cases to multi-function cases leading to Business Policy by the end of the year. Negotiation brief, article writing (problem-oriented), proposal writing, report writing (problem-oriented), and a report linked to the summer assignment were weaved into the course content.

The focus of the course by and large was on case analysis. Even in non-case situations like report writing, the focus of the assignments continued to be analytical, problem solving, and were based on management situations.

### Case Method

The primary pedagogy used in the course was the case method. While the class sessions included discussions and presentations, the emphasis was on written reports in assignments. The purpose of class discussion was to help the participants to think through the questions that they should ask themselves while analysing the case for writing a report.

The case method in WAC highlighted the following issues:

- The course required the participants to think through a given situation rather than do a generalized on-the-one-hand and on-the-other-hand type of presentation.
- The focus of the content was on problem solving and decision-making and the use of rigorous logic and evidence. This brought the WAC course in tune with other courses in the first year and management perspective in general.
- This course, unlike other courses, emphasized written communication. In a way, the written medium froze one's thinking at a point of time and helped to analyse the thought process and product repeatedly and iteratively.

## Managerial Oral Communication (MOC)

By 1977, the need for a complementary course on oral communication was felt. So, we developed the MOC course which was again a skill-based course. It was felt that MOC could take on from WAC after the participants had acquired the skill of analysis and communication in the written frozen medium. It was assumed that the grounding in OB courses and the summer assignment in the first year would provide the needed grounding for appreciating MOC.

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WAC was a more left hemispheric-oriented course. It emphasized reasoning and logic. But, MOC was a right hemispheric-oriented course. It dealt with relationships and emotional aspects. Unlike the written frozen medium of WAC, MOC emphasized the oral free-flowing medium.

The content of MOC enveloped situations involving listening, conversations, committees, negotiations, presentations, and interviews. Given the content and purpose, the case method was not found suitable. The use of caselets, incidents, and role plays were more relevant. But, cases were found suitable and were used extensively both in committee and negotiation modules.

## Wrap-up

Given the content and objectives of the WAC course, the case method was found to be ideally suited. It brought the course in tune with other courses and the management concepts and philosophy broadly accepted at IIMA. The problems faced in WAC did not arise from the course content or the objectives but from its administration and the development of case materials. While examining the course, we were constantly asking ourselves whether it should be a course in a management school or a communications school.

# THE CASE METHOD IN 'TEACHING' MANAGERIAL COMMUNICATION

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In rural Kerala, where I grew up in the 1950s, 'Communist' was a dreaded, hold-all label. It was slapped on atheists, non-conformists of any shade, street drunkards, and anyone who did not belong to the patriotic Indian National Congress. Strangely, the 'case method' reminds me of an equally loose use of a portmanteau label in discussions of management education. The only difference is that the connotations are generally positive.

Before I talk about the relevance of the case method in teaching managerial communication — that is what I am familiar with — I would like to first separate 'case approach,' 'case method,' and 'case analysis,' which are often used interchangeably.

## Case Approach, Case Method, Case Analysis

The case approach is naturally the broadest of the three terms. It refers to an *inductive* approach to education. It is based on the belief that, in Charles Gragg's words, "wisdom can't be told." You focus on individual 'stories' and derive wisdom or arrive at relatively loose, broadly defined heuristics from engaging with them. In this bottom-up approach, the learner is the driver and different learners develop different insights from the same story. The opposite of the case approach is the *deductive* one where the teacher starts from proven — or at least widely accepted — general principles. The teacher may use individual stories to illustrate the application of those principles. The lessons to be learned are the same for the whole class and pre-determined by the teacher.

Case analysis is but one horse in the case approach stable but the most prominent and most popular one in management education circles. The instructor challenges the learners to analyse a fairly concise and edited description of a managerial problem that has been presented to them. They have to go beyond the facts of the case and connect the dots in innovative and fruitful ways. Based on their analysis, they need to come up with decisions and their justifications: "If I were the protagonist, this is what I would do and here are my reasons." Not surprisingly, they are often curious about what decision was actually taken by the protagonist in the case and what its consequences were. The instructor may or may not know what happened in the company. Even if he/she did, they might not share it with the class. The decisions that players in the real situation took are largely irrelevant.

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There are other ways of adopting the case approach in the classroom. Using the case as a basis for a role play is one such approach. Instead of analysing the case, the class has to live through the events mentioned in the case or events that unfold as a result of actions mentioned in the case. Another is to use the case as a base on which the class builds an action plan or different groups in a class build different action plans. It is useful, at times, to treat the case as one of the many possible ways of responding to a challenge and to go back in time and build other ways of dealing with the original challenge. In other words, instead of asking what Mr Sheth should do now, the question can be: "What would you have done at the start of the case if you had been Mr Sheth?" The background remains the same. One can also think of changing one or more parameters in the case and asking the class to deal with the situation. The case may, for example, state that the company had a net profit of 8.5 per cent. The instructor might tell the class that the company had a net loss of, say, 12.5 per cent for two years in a row and the CFO had been jailed for fraud. Now, the class has to continue and re-build the case. Some management teachers who use case analysis may be horrified at the thought of subjecting cases to such treatments. But, these are all illustrations of the way a case can be used in what one broadly calls the 'case approach.'

'The case method' is a label that captures the relatively stable but by no means fixed collection of rubrics and practices followed by a particular group or school of professionals who adopt the case approach. One of the practices of instructors who use case analysis in the management classroom, for example, is to refrain from suggesting or throwing one's weight behind any suggested solutions whatsoever. They depend on the class to come up with their own solutions and to justify them. The instructor will challenge the participants closely but never approve or disapprove of what they say. The facts of the case are sacrosanct. Participants may not import anything into the case. They are, of course, allowed to make reasonable assumptions but a solution has to be found within the framework of the facts mentioned in the case.

The case method, then, is not a pure breed. What it means to you depends on what school of professionals you belong to, what subjects you teach, and what your objectives are. For me, the case method is about using cases as a basis for unscripted role play performed in class by the participants. They will need to analyse the case when they prepare in groups for the role play;

similarly, after the role play, there will be a review and an analysis of the way they performed their roles. This is how I have been using the case method as a teacher of managerial communication. Let me illustrate the difference.

## Case Method for Teaching Managerial Communication

I recall a case analysis session conducted at IIMA in 2002 by Robert D Blackwill, former American ambassador to India and HBS professor. He chose the short HBS classic — The Dashman Company — for analysis. The case is about a large defence equipment company in the US. It had over 20 virtually autonomous plants. Anticipating shortage of essential raw materials in 1940, Mr Manson, the company president, brought in an outsider, Mr Post, as vice president to coordinate purchasing, which had never been coordinated previously by the Head Office.

Mr Post convinced the Board that purchasing should be centralized for it to be coordinated efficiently and to prevent shortages in future. Armed with the Board's approval, he sent out a letter asking the purchase executives in the plants to notify him a week ahead of signing any contract above $10,000.

While Mr Post got positive sounding replies from most plants, he received no notice of intention to sign contracts above $10,000 although it was the peak buying season. Executives from the headquarters who visited the plants in connection with other business, however, reported that all units were functioning as usual.

The case was subjected to a lively and insightful analysis performed jointly by the instructor and the students. The latter rose admirably to the challenge thrown by the formidable instructor. They answered a large number of questions: Was there a problem at all? What was it? Was Mr Post a good hire? Or did Mr Manson make a mistake hiring him? Who was the real villain? Was it Mr Post? Mr Manson? Or was it Mr Post's assistant? At the start of the peak buying season, why did he suggest something that was certain to keep Mr Post on the roads for at least a month? Why were no notices received from the plants? What should Mr Post have done? And so on.

The analysis was exhilarating. Many mistakes organizations make in people management were ably brought out by the class. But, a thought struck me. This case was largely about organizational communication. How would I use it to improve my students' organizational communication skills rather than analytical skills which they get in other subjects too? The ability to analyse the case and talk about it would perhaps make them more articulate, but not directly improve the way they communicate in an organization because these were two entirely different sets of competencies. It is one thing to say, "I'd do and say such and such a thing if I were in that situation," and quite a different thing to actually do so. So, I set out to convert the case into a role play where the students have to perform communication and not just analyse what others have done or indicate what they ought to do.

It is one thing to say "I'd do and say such and such a thing if I were in that situation," and quite a different thing to actually do so. So, I set out to convert the case into a role play where the students have to perform communication and not just analyse what others have done or indicate what they ought to do.

### Case-based Role Plays

In the role play on Dashman, the class was divided into groups and each group was asked to take the role of one of the major players. Each group's representative would attend a review meeting (in class) convened by Mr Manson when he realized that something was amiss. Each representative would describe what he did and explain why he did so. Then, he would answer questions from the rest of the class where each had a specific role in the Dashman Company. The role play would be followed by an analysis of the way those players performed the roles given to them rather than of the case itself. In role play after role play, with different sets of participants, the result was very revealing. They displayed many subtle barriers to effective managerial and organizational communication. Nearly every representative spoke as if his/her own action was appropriate and the blame for the problems at Dashman should go to someone else. When they realized that the roles had been assigned at random and that they would have gone into the self-justificatory mode irrespective of the specific role they had been given, a major insight into the challenges of organizational communication was achieved. No amount of analysis of the case as an objective outsider would have given the participants this valuable realization.

Encouraged by this, I now convert many cases into role plays when I deal with topics such as listening, conferencing skills, presentation skills, assertive communication, and persuasive communication. The case provides a rich and complex organizational context for performing and refining a wide range of communication tasks. The analysis is of the performance by the participants of these tasks rather than of the case itself. Whenever feasible, the role play is video-recorded and played back for analysis by the whole class. Most participants find the experience a source of many insights into the way people communicate.

While case analysis and case role play can both be justifiably brought under the label, 'the case method,' there is a fundamental difference within the basic inductive approach. *In case analysis, you are an outsider; in case role play, you are an insider.* Case analysis is invaluable in areas such as strategy. Role plays built around suitable cases may be essential in helping participants refine their communicative or organizational behaviour as opposed to the ability to merely conceptualize behaviour. Within the case approach, then, one should explore ways of adding maximum value to the learners of different subjects rather than be constrained by orthodoxies derived from successful teaching of certain other subjects.

Many communication issues are such that the ten or fifteen minutes that an instructor can spare for the role play in a class may be nowhere near what is needed. In spite of such drawbacks, it is worth developing and using case role plays if the objective is to help participants refine their communication rather than talk about it.

Of course, case-based role plays are subject to all the weaknesses of role play as a classroom technique. In spite of sincere efforts, some participants may be unable to understand and absorb the essence of the characters they play. They may unwittingly ignore case facts and play themselves and thus upset others' planning and responses driven by the case facts. Some participants may be tempted to play to the gallery and create fun and laughter in the classroom but devalue the learning experience. This is especially so when role plays are video-recorded for subsequent playback and analysis. Some role players are unable to see the other players except as their fellow participants. This may defeat the purpose of the role play. Moreover, many communication issues are such that the ten or fifteen minutes that an instructor can spare for the role play in a class may be nowhere near what is needed. In spite of such drawbacks, it is worth developing and using case role plays if the objective is to help participants refine their communication rather than talk about it.

## GOING BACK TO THE FUTURE OF THE CASE METHOD

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There is a whole generation of us, IIMA alumni of the 1970s, who have survived the risk of being made obsolete when the environment around us changed in 1991. In fact, not only did we survive, we thrived; and many of the 1970s alumni lead important institutions of post-liberalization India and do so very well indeed.

### Long-term Impact of the Case Method

One cynical view is that we were recruited to IIMA for our brightness; obviously, we would adapt anywhere, anyhow. But, the reality is that we had a business school education that equipped us to embrace change and run with the ball. As Professor Ravi J Matthai said, "We teach you how to learn so that you can learn the rest of your life." And that is exactly what happened. We were taught how to think, how to solve problems, how to learn, and how to create solutions for situations we knew not much about. And that is why when the world changed we still thrived.

What, I believe, gave us this unique competence was the case method of teaching — taught the right way by stalwarts of the case method. It truly was about problem analysis, about the process of getting problems solved, about knowing that there are only thinking frameworks in this world, not perfect formulae with all the data available to plug into.

## The Good, Bad, and Ugly of the Case Method Teaching

I was reading more about this subject on the Net and came across a brilliant article by David A Garvin, "Professional Education in the World of Practice."[1] He quotes thinkers on this subject saying that the positives of the case method are that 'it puts students in the *habit* of making decisions,' creates a 'bias for action,' and gives 'courage to act under uncertainty.' Equally, there are negatives like 'foolhardiness,' and no respect or awareness that certain situations may actually call for a 'wait-and-watch' approach. My view is that this default option does not work too well in this new world of ours. As a default option, "when in doubt, do something that keeps your future options open or place considered bets," is what works. The case method builds for what Garvin articulates as "flexibility … altering positions as new evidence emerges." In today's world where new evidence is perpetually being created and where strategic navigational principles are more critical than strategy-determined destinations, the case method is just what is needed to build great managers. It is not about 'what to do.' It is about 'how to think about things.'

However, badly taught cases — with cases being illustrative of problems and instructors forcing the class to come to a single solution in a single way — are disastrous. Then, we truly have a 'stuck-in-between' syndrome — not deep enough for anything or for any kind of learning. My worry is that we are getting to this point in our premier business schools where how to teach cases, how to prepare for cases, and the whole religion and ritual of the case method is not being taught formally to successive generations of teachers and students. In fact, even cases are ever so old, on an average. I had an interesting interchange with an IIM dean. He said that my worry and my push for contemporary case material reflected very little understanding of the case method itself. According to him, old cases could teach as well, if not better than new ones, since the solution or the context was not the point of the teaching, but the process of arriving at it was. I do agree that there are some all-time classics that are timeless and ageless and are 'must-haves' for any course. However, my worry as a practitioner is that if most of the cases taught are circa 1970/1980, pre-liberalization era, while the world outside is in 2005, globalization era, then we will be turning out a generation of Rip van Winkles struggling to orient themselves to the new world. Many cases of yesteryears do not reflect the complexity of the contemporary world merely because many of these issues are new. As a practitioner of 30 years, I can vouch for it.

Today, the most important qualities that are needed in a business leader are problem solving skills (intellectual power to determine direction), innovation, and willingness to shed past dogmas and respond willingly to change. The case method does a splendid job of fostering all three.

Similarly, IIMA had banned cable television on the campus for many years. I was worried about this as we were bringing up a bunch of future managers, especially marketers, who had no first-hand clue about the information revolution that was sweeping the country. And it would have been naïve to say that it did not matter!

## Relevance of the Case Method for Building Leadership Skills

Today, the most important qualities that are needed in a business leader are problem solving skills (intellectual power to determine direction), innovation, and the willingness to shed past dogmas and respond willingly to change. The case method does a splendid job of fostering all three.

Let me discuss one more peculiarity about those who get into the top-tier business schools in India. They are the products of huge angst. To get into an IIT and/or an IIM, you have to have been a 'straight and narrow' guy or gal, doing things by the book. There is no room for brilliant mavericks here. The result? As a teacher for the past 20 years, I am noticing more and more risk aversion, more and more 'what is the right answer' questions, and more and more 'let us not blow this hard

[1] http://www.harvardmagazine.com/on-line/090322.html

work for opportunity by thinking out-of-the-box.' For this lot, we absolutely need the case method. Talk and think on the fly. There are no right or wrong answers. There is no perfect world. There is no book! You need to go ahead and take some risks if you have to create the 'next practice.'

So, in conclusion, I would say that we should stay with the case method but rededicate ourselves to it. The craft is jaded and warped as it has trickled down through the years without serious renewal. It is time for a new push to get the case teaching up to speed in our premier business schools.

## WHAT IS THE FUTURE OF THE CASE METHOD IN EXECUTIVE EDUCATION?

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As I see it, the case method is synonymous with experiential learning, that is, the learning is based on experiencing real world settings. Further, the learning is personalized allowing for inductive reasoning in a framework that permits 'no right or wrong solutions.'

### Role of the Case Method in PGPX

The Post-Graduate Programme for Executives (PGPX) is a full-time residential programme to be launched by IIMA in the year 2006 for executives with substantial work experience leading to a one-year Post-Graduate Diploma in Management. The objective of the programme is to develop bright, enthusiastic, and aspirational executives into management leaders and change agents in the global arena. The programme has a general management focus with emphasis on managing across borders and cultures.

Given the above, the case method becomes even more significant as a learning methodology on the following two dimensions:

- The value of inductive reasoning is richer since it can be extended to the participant's prior experience.
- The personalized learning, which could result in different solutions, becomes even more visible resulting in the much needed value of empathy and acceptance of differences in approaches.

> Work experience will enable a richer discussion based on relating to one's own experiences during case discussions. One can expect to see livelier classes when it comes to such sharing and understanding organizational implications. Questions and approaches based on out-of-the-box thinking could be limited due to the 'baggage' of experience.

### Role of the Case Method in PGP vs. PGPX

The PGPX participants would have substantially more work experience than the participants of the PGP. In fact, the first batch of PGPX participants would have an average experience of over nine years (eight years more than the average for PGP). The increased significance of the case method, in the context of substantial prior work experience, as outlined above, brings out the similarities and differences with respect to the PGP.

### Role of Work Experience in the Case Method

Work experience will enable a richer discussion based on relating to one's own experiences during case discussions. One can expect to see livelier classes when it comes to such sharing and understanding organizational implications. Questions and approaches based on out-of-the-box thinking could be limited due to the 'baggage' of experience. It is also possible that some participants may actually want a quicker and a greater exposition of the underlying abstraction and theory since their experience may already have them in this quest mode. Yet, class discussions cannot just focus on abstraction without connecting to relevant applications. This would indeed be a challenge for the faculty.

## Teaching Methodology for PGPX

The structuring of the PGPX course design takes into account the substantial and varied experience the selected executives bring to the classroom. It is hoped that the teaching methodology will evolve over time given the experience and commitment of the faculty.

The design of PGPX is built on IIMA's well-established experience of designing and running post-graduate management programmes for exceptionally bright students and a wide range of executive education programmes for practising managers from many countries.

Many of the courses in the 'Building Blocks' segment of the programme have been designed with the idea of a faster ramp-up into the concepts rather than developing basic organizational understanding and/or implementation mechanics. The courses in the 'Preparing for Top Management' segment have addressed the question: What do top managers do?

The PGPX also plans to build on the rich experience resource that the participants bring to the learning environment so that it can benefit IIMA, the participants, and their organizations. There is a significant independent project course wherein the experience of the participants along with IIMA's learning rigour is to be leveraged thereby resulting in a case (for use in the case method!), or a paper on an industry structure analysis, or 'bridging the divide' (focused on solution approaches to a global/societal divisive situation), or even a business plan as a potential entrepreneur. These outputs are expected to add value to the academic material at IIMA. The 'International Immersion' segment provides for a group project wherein a live organizational problem will be addressed by the participants and the learnings shared. Leadership workshops and seminars by the participants for mutual learning are also built in.

> The PGPX plans to build on the rich experience resource that the participants bring to the learning environment so that it can benefit IIMA, the participants, and their organizations.

Regarding the ratio of course content that will be taught using the case method, it is expected to be more than the PGP though that is not to say that the focus on abstraction or theory would be any less.

## Incorporating Learnings from the Case Method in PGPX

At a structural level, at least two ideas from the use of the case method in executive education from other business/management (development) programmes have been incorporated in PGPX. One is the integrated case which normally is conducted towards the end in general management programmes. In the PGPX, it is expected to be spread over five working days. The other is the idea of focused experience sharing which takes the shape of a rigorous independent project (described above) and seminars by participants. However, the learnings from the classroom dynamics are not really transferable since the management development programmes, being of a short duration, are focused more on exposure to the subject with some conceptual understanding. The PGPX, in a way, seeks to transform the individual towards a higher career goal.

# THE CASE METHOD IN INDIAN MANAGEMENT EDUCATION

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That the case method has many potential benefits is well established — it can bring into the classroom a simulation of real managerial situations with all their attendant characteristics — complexity (multiple objectives, diverse stakeholders, trade-offs), ambiguity (principally problems of interpretation), uncertainty, and incomplete information. This offers an opportunity to the student to put himself/herself in the shoes of the decision-maker and grapple with managerial decision-making. Yet, the use of the case method in management education in India is far from widespread.

## There Isn't One 'Case Method'

One reason for this is perhaps inherent in the nature of the 'case' itself. There is no single understanding of what constitutes a case let alone what characterizes the case method. In common parlance, a case seems to indicate an illustration of a best practice rather than a managerial decision situation — hence, companies take pride in having been the subject of the HBS case study. Though case-based research is often not considered 'scientific enough,' cases continue to be written as part of qualitative research studies in an effort to answer exploratory research questions. However, without modifications and rewriting, such cases are not suited to classroom use. Often, a case can also be an extended example or simply a problem dressed up with bells and whistles. Thus, not every case that is written is ideal for classroom use.

The case method has its variants as well. In its early days, the case method at Harvard was much like using practice cases in law — an opportunity for the students to practice their analytical skills on a great diversity of problems. Generalization or distilled learning from the cases was not stressed upon. With the development and growth of management concepts and theories, the case method has also morphed. Today, most teachers using the case method choose their cases based on the concepts they wish to illustrate rather than just the nature of the situation or the type of industry in which the case is based.

Even amongst those members of the faculty who use cases in a conceptual framework, different teaching approaches are used. Some teachers do not explicitly 'teach' a concept, but instead guide the class discussion so as to bring out the concept itself with supporting reading to elucidate the concept. Other teachers give an explicit lecture or hold a discussion on the concept before using the case to reinforce it. (A variant of this latter approach is giving a case as a group project for analysis followed by a presentation or a report submission.)

In my experience, Indian students prefer the approach of covering the concept first since that is what they are accustomed to or because a significantly higher than average set of teaching skills is needed to bring out a concept purely through a case discussion. In any case, building a course primarily around cases necessitates a high quality of cases, and this is sometimes difficult to come by particularly if one is looking for cases that come from local (social, cultural, and political) contexts.

## Inadequacy of the Right Cases

There is a serious shortage of *good* cases that bring out important concepts. In the two fields in which I do most of my teaching — strategic management and innovation — case writing has not kept pace with managerial challenges. For example, cases on Indian companies that deal with (1) the issues involved in taking a software product to the international market, (2) the strategic management of intellectual property rights, and (3) the difficulties in bringing in an innovative mindset to a traditional engineering company are hard to come by. This problem is further accentuated by the shortage of *good* cases on well-known companies. Such cases are important because they increase authenticity and excitement and thereby drive student interest and motivation to prepare the case.

A *good* case has a strong 'story line,' and the decision situation comes alive through the persona of the CEO and other key decision-makers. It has a smooth narrative, relevant quantitative data, and a clear decision-making situation. It has a strong underlying conceptual base that can be brought out by a skilled case teacher.

I referred above to a *good* case and I should explain what I mean. A *good* case has a strong 'story line,' and the decision situation comes alive through the persona of the CEO and other key decision-makers. It has a smooth narrative, relevant quantitative data, and a clear decision-making situation. It has a strong underlying conceptual base that can be brought out by a skilled case teacher. Writing 'good' cases is not easy because case writing is a skill; it comes largely by practice. Apprenticeship through working with experienced case writers is one way of quickly coming up to speed but opportunities for such apprenticeships are rare. Case workshops are helpful only if they involve actual case writing and iterative cycles of feedback and improvement.

Another problem is the lack of access to even those cases that are written — there is no Indian case clearing house and few institutes have user-friendly mechanisms that facilitate the identification and purchases of cases by outside faculty.

One reason for the inadequacy of case output in India is related to the measurement and incentive systems of our management institutions. The institutions at the top that are capable of bringing out *good* cases are today trying to establish their intellectual credentials on the world stage. This means focusing on research publications preferably in top international journals. Though there are a few outlets to publish cases, case writing does not fit in with this agenda as published cases are not 'viewed' in the same light as a research paper in an academic journal. Why would a faculty member, already pressed for time, write a case when economic rationality suggests spending more time in company-sponsored executive education or consulting and the promotional or assessment requirements of the institution demand research output? (This struggle is not unique to India — even HBS faces similar problems particularly because its faculty would like to be recognized by the wider body of academic peers and this means having a strong research output rather than writing cases.)

Another barrier to good case writing is the absence of corporate cooperation. In a world that is dominated by hype and public relations exercises, few companies are willing to allow anything to be written that shows them, even remotely, in a bad light. My experience is that even in companies where IIMA graduates are in positions of authority — though they presumably benefited from the variety of cases they did during their PGP days and hence understand the value of good cases — they are often either unwilling or unable to get the required clearances for interesting case situations. In this context, I might mention one technique that I have found useful in gaining company access — establish your credibility and seriousness first by writing a first draft of the case based on information available in the public domain and then approach the company with your write-up, indicating the gaps and questions whose answers might help in closing the gaps. Though this does not overcome the problems of executives having (often unfounded, in my opinion) fears about confidentiality, it does help dispel the notion that the company might end up wasting time by interacting with the case writer. On the other side of the spectrum, there are instances of some institutions spewing out cases without having the capability to write good cases and even selling them on the Internet in search of better ratings!

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## The Future of Cases in Management Education

But, the situation is not totally bleak. In recent times, there have been calls to transform management education from renowned scholars like Warren Bennis and Henry Mintzberg. They have called for equipping managers with the skills and attitudes to lead organizations rather than giving them theoretical concepts and skills that have only a limited application. If this trend gathers momentum, the case method will get a fresh wind. At the same time, we should remember that there are alternate methods of simulating reality. Games and computer-based simulations are becoming popular. And there are also calls to develop learning environments that help managers learn from their own experiences rather than trying to solve some other company's cases. The case method, therefore, has its task cut out.

The challenges faced by the case method are aggravated by other things happening around us. Reading skills are de-emphasized today. The new generation of managers turns to the Internet (rather than to books and journals) for their ideas. Getting students to put in the preparation time required for a thorough preparation of a case was always difficult, but is perhaps even more so today with the shorter attention spans of the Internet generation. Schools like HBS manage to overcome this problem thanks to an institutional commitment to the case method as well as high marks (40-50%) allocated to class participation in case discussions. In the absence of adequate student preparation, a case class is like soggy chips and probably worse than having a straightforward lecture. Another issue is that, today, with the growth of the Internet, alternate approaches to 'cracking' well-known cases can be easily located and downloaded from the web. This makes the teacher's job really tough.

At IIM, Bangalore (IIMB), to enable recognition of cases as research output, we have introduced a formal review process to ensure the quality of cases written. Before a case is registered with the IIMB Centre for Development of Cases and Teaching Aids (and hence counted as output), we send it (along with a mandatory teaching note) to two referees, one internal and one external. The case is registered only after the case writer shows evidence of having revised the case based on the feedback received. This process works but is slow and will need continuing institutional support if it is to be sustained.

In the Strategic Management Forum (SMF), a professional body of academics and practitioners interested in strategic management, we have launched some initiatives to promote case writing. The SMF annual convention has one session (typically half a day) devoted to discussing cases and case leads. From the 2006 convention onwards, we plan to give an award for the best case presented at the convention. We have started an online e-group for exchanging feedback and information about cases. On the anvil is a book on Indian strategic management cases.

Some of these initiatives will hopefully improve both the supply and demand of management cases in India, and contribute towards a rejuvenation of the case method.

## SOME REFLECTIONS ON ADOPTING THE CASE METHOD OF TEACHING

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Indian Institute of Management, Indore (IIMI) adopted the case method as its predominant pedagogical tool when it started its PGP in 1998. This method was modeled on the lines of IIM, Ahmedabad. IIMI relied on the faculty, staff, and case resources from IIMA in its formative years. Many young faculty recruits of IIMI attended IIMA's Faculty Development Programme. The experience of these faculty members in transferring the case method of teaching and deliverables to B-schools outside IIMA may throw light on the replicability of the method in different environments.

As a beneficiary of case teaching in IIMA, I would like to look at the method as comprising two fundamental parts: firstly, the more important intangible knowledge and learning part and, secondly, the more tangible, physical and technological part. By learning through the case method, students in IIMI had the advantage of dealing with business problems embedded in a context that required a holistic understanding of industries and sectors and not as simple application tools for problem solving. Other benefits included training in clearly identifying problems, alternative solutions, and criteria with which to prioritize amongst these to the extent of having a contingency plan. However, the effectiveness of learning and knowledge acquisition depended to a large extent on motivation and the proactive initiative of the students themselves to thoroughly analyse cases in order to internalize the decision-making process discussed before and live the real-life dilemmas of the protagonist in the case. The pedagogy was to help individual students develop the diagnostic skills, the persuasive skills, and also acquire the individual style of decision-making. To understand how much of this has been achieved at IIMI requires analysis of the narrower class level and the broad institute level environment.

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### Learning Experience

Like any other method of delivery, the case method too had the objective of familiarizing students with theory and concepts. Grounding in case teaching, in that sense, would mean meeting the end objective of teaching how to analyse a case situation by helping to identify the appropriate framework of analysis to use along with a determination of purpose and method. IIMI has not been able to achieve this to the extent desired primarily due to the lack of preparedness of students coming to case class followed by sub-optimal levels of learning in the class. Interactions with students and faculty reveal different reasons for the ineffectiveness of case classes. From the student's perspective, the lack of motivation to prepare was either because not much of learning was expected from the case handled by a particular faculty in class or because the scheduling of classes did not give enough time to prepare for all the cases in different courses. The faculty felt that the lack of reading and hence knowledge of concepts/frameworks and the poor pre-class preparation of the case by students hampered learning from a course. To probe these issues deeper, both class dynamics and institute level functioning have to be understood.

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At IIMI, the common practice of pre-designated presentation of cases by small student groups without a class discussion often failed to bring in the required vibrancy and participation that motivate students to learn. While the faculty failed to encourage learning among students by sharing ideas and using cogent arguments based on data analysis that tested the application of theory/framework, the motivation among students to come prepared for the class was low. While some of the blame for low motivation can be attributed to the class dynamics, the faculty consensus was that the level of preparedness of the student was so poor with regard to case facts and poorer still with the theoretical concept/framework given as a reading that expectation of the desired maturity of discussion and hence learning from a 70-90 minutes class was indeed a tall order. For example, while dealing with a case on diversification, if the student has not gone through the reading(s) on types of diversification and the parameters distinguishing them, it is difficult to identify the specific diversification in the case and hence there is a tendency in that case discussion to be prematurely normative. To overcome some of these problems and increase learning in the class itself, the faculty at IIMI have even tried to move away from the conventional approach of exposition of the theory/concept entirely through case discussion by attempting to precede a case class with a theory class where the concepts are first discussed threadbare before applying them to case situations. The moot question remains: how much of the class could subsequently identify and apply the appropriate theory to a specific case situation?

## Institutional Support

Since case learning requires individual and small group preparation before class, the general academic environment in the institute is bound to affect the learning process. This refers to the effectiveness of existing systems and processes in supporting case-based learning at IIMI. Beginning with an elaborate orientation programme into case-based learning for fresh students to the formation of groups for preparation, a continuous evaluation system and concomitant examination and invigilation system to cater to case-based open book and notes examination was put in place at IIMI. However, the effectiveness of delivery may falter due to the absence of an appropriate organizational structure. Organized into seven functional areas, core and elective course delivery is the responsibility of the respective areas in the institute. Areas were represented by their area heads in the PGP Executive Committee which, in the absence of a separate Academic Council, dealt with both academic and administrative issues of the PGP. Progressively, while the PGP Executive Committee looked into the wider administrative issues of PGP, the thinking that evolved was to leave academic course-related matters

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within the purview of respective areas with the areas having the primary responsibility of offering the relevant core and elective courses. However, this made it difficult for a centralized course review to identify overlaps and synergies. When the size of the activity is small like a single PGP section with a few faculty, cooperation across areas in delivering specific topics at individual faculty level was possible but, as the scale of activities increased, individual areas became like silos. The need to cooperate across areas with regard to topics and hence cases to be used further declined once the theme-based modular approach having cross-functional offerings around a module was replaced with an area-specific course offering sequenced across six terms of a PGP batch. The theme-based teaching demanded multiple visits for short duration by guest faculty that became unsustainable with increasing batch size, multiple sections, and continued dependence on guest faculty. Subsequently, there was no structural substitute created for the modular course delivery that would ensure synergies of learning across areas. Two systemic fall-outs of this were (a) visiting faculty teaching by bunching together of case classes over a few days (read weekends) in an entire term with large gaps in between resulting in discontinuity while students were unable to prepare and internalize cases when done back-to-back over few days of the term. This is the preparation problem mentioned before and (b) repetition of cases and concepts resulting in loss of learning for the students besides the compression of preparation time for other cases. Consequently, the students at IIMI did not get adequate time to prepare for a case, internalize the concepts or reflect on the case after the class thereby affecting the learning objectives.

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The effectiveness of case learning as knowledge dissemination goes together with knowledge creation, i.e., research and case writing. This helps the faculty to be up-to-date with new and emerging areas of knowledge. How else, for example, could cultural issues peculiar to India be highlighted in the class? Although it remains predominantly an individual effort, in the absence of a culture and practice of case writing, the expected institute-level initiative is lacking at IIMI. A syndicated case writing effort by IIMI involving many members of the faculty and providing all leads and support with the ultimate objective of producing teaching cases and publications will help to alleviate the situation. Similarly, as mentioned above, the effectiveness of case teaching also depends on the skills of teachers to act as effective facilitators to group learning through discussions in class by students themselves. IIMI needs institute-level effort to impart/upgrade teaching/writing skills of its teachers by organizing and participating in case workshops that expose the faculty to the finer nuances of case writing/teaching, particularly for fresh recruits from diverse backgrounds. For a growing institute like IIMI, the effectiveness of case pedagogy could mean having senior and experienced faculty handle cases jointly with junior faculty by sitting through the sessions of each other in order to give useful feedback and learn. Acknowledging this need, IIMI used to necessarily send its faculty (particularly new recruits) to attend case teaching/faculty development programmes in other institutions until the pressures of an increased teaching load nearly stopped the practice. This period of grooming, often called the honeymoon period, is an important component of a thriving case teaching management programme like the one at IIMA.

While infrastructural problems like photocopying facility, though central to case teaching, can be more easily sorted out, more serious issues at IIMI like handling large classes without the support of Academic Associates (AA) hampered continuous evaluation in the class besides depriving both the students and the faculty of the benefit of feedback at the end of the class to enhance effectiveness. While the AAs can get trained on the job, they can, if made available, also assist in research and course development/upgradation work.

## Conclusion

To conclude, I argue that a multi-directional effort to improve both institute and class level mechanisms to maximize learning (by inculcating an effective case-based knowledge delivery process, which enhances the motivation level of the students), needs to be comprehensively developed and adopted at IIMI. Efforts must also be made to look into the aspects ranging from the improved skills of teachers to better systems and organization structure for academic matters of PGP, particularly in view of discontinuous change from a small-size modular programme to a large-size functional area-driven PGP academic system.

# SECTION III: FUTURES

## FUTURE OF THE CASE METHOD

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Although the case method draws a lot of attention, the form and extent of its use as a pedagogical tool in business schools is not known. The case and the method are referred to with different meanings ranging from a philosophy of education to the occasional use of an illustrative caselet.

HBS, which has been the pioneer in the use of the case method in management education, has developed this pedagogical tool as a way of life or as an institutional philosophy that distinguishes its educational programmes. In this philosophy, both the case and the method have special meanings. A case is a narrative of selected aspects of an actual situation faced by a manager in the real world presented in such a way that it interests and challenges the student. It is neither an example of a precept nor a photographic picture of a situation. It builds an issue or a problem for discussion among learners. The case method refers to the use of a sequence of cases in a course curriculum which enables the student to get into the heart of the subject and its practice with all the complexities of the real world. The course material or curriculum may include theoretical readings, but the main focus of the course and class discussion is the case. In this philosophy, the case method is more than an occasional use in a course either as an illustration of the application of theory to a specific situation or as a lively introduction to the subject.

The teacher and the students can compare and contrast cases and learn from the implications of the differences. Comparison between theory and its practical application in a situation can also be useful. Learning takes place in an environment of active preparation, involvement, and participation of the learner and promotes the development of good judgmental skills in complex situations. The case method is not treated as a substitute for quantitative models, methods, and analysis. Even quantitative courses, such as managerial economics, have been taught through this method. The case method does and should use all relevant quantitative and analytical tools when appropriate. The method enables the learning of how to formulate the problem in a manner appropriate for quantitative techniques and to learn the proper interpretation and use of the results in the context of the situational factors of the case. As the process of case discussion involves questioning and convincing the class, participants also learn communication skills.

> The case method has been found particularly useful in subject areas, such as strategic management, where the relevant concepts and variables are abstract, difficult to define and measure, people-oriented, and the assumptions of the decision-maker have to be tested with incomplete information, and where the wrong assumptions and behaviour can have serious and long-term consequences.

Implicit in this line of thinking is the fact that each company or organization is unique (having its own history and people) with its relationships and preferences. The case method has, therefore, been found particularly useful in subject areas, such as strategic management, where the relevant concepts and variables are abstract, difficult to define and measure, people-oriented, and the assumptions of the decision-maker have to be tested with incomplete information, and where the wrong assumptions and behaviour can have serious and long-term consequences. Decision-making under such conditions is not only an art, going beyond the application of scientific or quantitative tools, but also a personal synthesis of the situation.

By analysing and discussing a variety of selected cases set up as a sequence of cases, with supportive readings, it is expected that the serious student will develop his or her own pattern of thinking, analysis, and judgment that would be useful in practice and allow him or her to take up the leadership of organizations.

For the case writer and instructor, the case method provides an opportunity to interact and learn to grapple with the complexities of the real world rather than be immersed in the impractical abstractions of theory or models. The institution supporting such a philosophy benefits from close industry interaction through the opportunities it creates for consulting and executive education.

Realizing the full potential of the case method is difficult in practice, for the method has its problems. Good, relevant, and current cases are hard to find. It is difficult to cover all the concepts in a course. Many cases do not achieve the desired results and have to be dropped. Even good cases become quickly outdated and, without sustained case writing effort, the case method may not achieve the desired impact. Case writing requires considerable faculty time and resources. It requires close cooperation of the company or the organization concerned and the whole-hearted support of the managers involved.

From the point of view of the learner also, the case method requires considerable preparation time and effort. Without such effort, the learning can be superficial. Learning across students can be uneven with some students finding the course directionless and burdensome.

Teaching through cases is also an art just as case writing is. It presents its own problems as well. Teaching through the case method requires a different orientation than the common information or knowledge transfer mode of instruction. Information that is easily transferable is either provided in the case itself or in the associated readings. The case method of instruction focuses on the construction of knowledge through the application of general ideas to the specifics of the case, their synthesis, and thus, the development of judgmental skills.

Leading case discussions, I feel, is different from the process of cross-examination or the dialectic method in Socratic philosophy. The instructor is neither in possession of the universally applicable 'Truth' nor is he impelled by an inner voice to win everyone over to the 'Truth.' The instructor is a facilitator who creates the learning conditions in the classroom. If the instructor starts with Socratic notions and assiduously questions and cross-examines an individual participant, he can unnerve and demoralize the whole class. The case method would then become inefficient as a pedagogical tool. The case method is a more open-ended group inquiry to identify the problem or problems in the case, possible solutions, and their pros and cons. The instructor builds and maintains the class as a learning group which is confident of cross-examining each other in a spirit of contributing to and learning from the class and the case. The instructor is not the 'intellectual midwife,' though he may certainly shape the course of discussions through his own questions and contributions. He does not dominate either the discussion or the thoughts of the participants. Thus, the instructor has to be comfortable in the uncertain environment of the class for the unexpected turns and twists in the discussions and the outcomes as participants bring to the class their own unique experiences, skills, and preferences.

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Good case teachers are scarce. Their development requires appropriate institutional environments. Another concern is research. Case-based instruction and case-based research will synergize effort and support each other though both are resource-intensive and require long periods of time for yielding useful conceptualizations. While such research may carry respectability among practitioner groups, it is not so in research journals. Faculty visibility in research circles can become a problem. Perhaps for these and other reasons, some research-oriented schools have abandoned their own case writing effort and have preferred to use the cases written by other schools. They do not have any institutional preference towards the case method. Faculty members are free to choose the method appropriate to their subjects and research interests. Some with industry orientation may use cases while others who are research-oriented may prefer other methods. In India, the curriculum and examination systems of many university departments and the affiliated colleges rarely include the case method.

In spite of adverse institutional conditions, the case persists as a useful device. While the extent of its use as developed by HBS is not widespread, the case holds a fascination among many students and teachers. Many attach a premium to the case and the case method because of its closeness to practice and the real-world context and its ability to get active involvement of the students. The stronger foundations of the case method in learning theory than the typical lecture method is probably why there is a persistence and fascination for the case method.

Another dimension behind the question of persistence may be that better research and more efficient pedagogical methods may be found even for complex and abstract areas such as strategic management. While many operational areas of management are getting structured because of advances in information and communication technology, thus making possible the application of dynamic, quantitative, and computerized methods, competitive and environmental uncertainties are increasing and open-ended unstructured areas remain. Similar expectations existed even in the 1960s when systems analysis and quantitative methods were making inroads into unstructured decision areas. But, the unstructured areas continue despite progress in the rigorous structuring of more and more decision areas.

The case method, therefore, will, in my view, continue to draw attention and engagement of both instructors and students. Its persistence as a school-wide or programme-wide method will not probably grow, especially in India, in tune with the promise or potential of the method. The growing competition among the schools may promote the adoption of the method by some schools, on an institution-wide or a programme-wide basis, to gain a distinctive position. While that may not happen in the immediate future, the case and the method will continue to have a distinctive and useful place among pedagogical tools. In that sense, its future is assured.

## THE METHOD IS THE MESSAGE...

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The world of reality which managers have to be confronting in the course of their professional practice is a complex mix of contending and cooperating actors, factors, and forces. Often, the dynamic complexity is experienced as an impenetrable cacophony of confused signals which is approached with a combination of impressionistic explanations, interventions, and actions drawing from earlier experiences. It is this reality which the managers believe they can handle better if they get the advantage of management education by which they hope to make better sense of the seemingly 'impenetrable confusion' by learning to employ more thoughtful and methodical approaches.

> The challenge of management education in developing managers for high calibre professional practice lies in closing the *distance* between the world of *management reality* and the world of *methodical management* of that reality.

The challenge of management education in developing managers for high calibre professional practice, therefore, lies in closing the *distance* between the world of *management reality* and the world of *methodical management* of that reality. Generally speaking, the key to bridging the gap between the phenomena and the process of learning about the phenomena is mediated by a conceptual and methodological mapping of the discipline related to the field of study, legitimized by formal and informal mechanisms created by purveyors of the discipline. There are content demarcation criteria for the inclusion and exclusion of concepts, taxonomies, theories, methods, tools, and techniques to define the 'line of control' of functions and disciplines.

Experience shows that management educators work with a rather general framework in the creation of content. There is only broad consensus on the input disciplines and management functions within the frame of reference of developing a 'general management' perspective or 'functional specialists with a general management' orientation or whatever packaging frame may be the fashion of the moment. The content itself appears like a hash of disciplines, functions, courses, and modules with each micro unit *de facto* being delivered in an insulated and isolated manner with little reference to the interconnectedness of various inputs across courses. There is still no frame of reference to determine what is critical in determining content. Most of the time this is done through a process of 'benchmarking' with artificially created and media-sustained 'rated' institutions which become the standard for imitation or differentiation. The only tangible 'differentiation' attempted on the content front is in conjuring up semantic variations in packaging curriculum structures and titles of individual courses. Even after over a hundred years of formal management education, there is neither a grand theory of management education 'content' nor even a middle range theory of management 'practice.' Legitimization of the content of management programmes comes not through empirical content mapping, but through the bureaucratic enterprise of rules, manuals, departments, course committees, procedures, and rulings of what is acceptable and what is not. More importance is given to 'quick fix' interactions with campus recruiters, student feedback, and alumni views than serious and rigorous exercises involving professional educators and thoughtful practitioners. Artificially created institutional authority informed by *ad hocism* and opportunism projects itself as the arbiter of institutional legitimacy and acceptability of content inputs. 'Pecking order' benchmarking combined with 'institutional-bureaucratic' regulation ensures a managed suspension of critical empirical assessment of what goes into management education content development. The resultant casualty is the effort needed for bringing meaning to high intensity learning interactions through empirically constructed content mapping. The net consequence is that participants in management education programmes are bombarded with numerous inputs in a rigidly controlled, high-pressure environment sustained by mechanistic testing and grading processes. Participants literally run from one session to another, one course to another, and from one topic to another within the hallowed walls of the management schools' well-equipped 'golden cage' of classrooms, especially when they are going through the compulsory curriculum in the first half of the PGP. It is left to the participants to integrate inputs, extract meaning, and store everything for future use in the pursuit of professional practice.

> It is evident that within institutions and in institutional processes, more time, energy, and money is spent on the case method of delivery than on the content to be delivered through the case method. Legitimization of management education appears to come less from an empirically determined content domain and more from an aggressively marketed *method* of content delivery.

If content is not the primary cutting edge of management education, what then might be the contribution of management education to the development of professional managers and bridging of the gap between the world of reality and the world of learning? What is it that makes young people come in hordes to the portals of schools of management willing to spend time and money? Behind the signs, sounds, and symbols of slick rationalizations, the honest answer is simple — the answer which every new entrant into the higher rated management institutions gives in the selection interview as well as in the orientation programme on entry into a management school — it is because high profile recruiters come flocking to the exit gate of the management school. The higher the profile of recruiters at the exit gate, the more incessant the knocking and pounding at the entry gate.

Responses of aspirants during admission interviews to the question — Why do you want to join our institution — are invariably a prompt 'placement' followed by 'the case method of teaching.' In 20 years of interviewing, one has hardly ever heard anyone talk of the uniqueness and quality of content. It is also evident that within institutions and in institutional processes, more time, energy, and money is spent on the case method of delivery than on the content to be delivered through the case method. Legitimization of management education appears to come less from an empirically determined content domain and more from an aggressively marketed *method* of content delivery.

Case-based problem solving experiences enhance understanding, sensing, thinking, imagining, analysing, visualizing, decision-making, implementation, and review capabilities even as learners interact under the skilled guidance of instructors.

It can, therefore, be postulated that the phenomenal success of management education over a period of 100 years can be attributed more to the dominance of method over content rather than to the uniqueness of the content delivered through the method. This postulate refers to the total management education experience and not to exceptions like individual offerings and initiatives. There could be specific course offerings which are innovative and unique especially in the electives section where content and method can both generate participant interest as reflected in course registration figures.

Experience also shows that in high-intensity learning interactions where method more than content gets importance, certain conditions are necessary to pull it off:

- cases which hold a mirror to the dynamic complexity of reality
- participants with keen and analytical minds
- great teachers with mastery over the case method
- an environment whose belief system worships the case method and evokes unquestioning reverence for it
- a culture which encourages sincere preparation whether the case is relevant, useful, interesting or otherwise
- an environment where the schedule of sessions is sacrosanct, presence of participants in the class day in and day out is ensured voluntarily and without fail, class participation is vibrant, substantive, 'graded,' the skilled instructor functions like a master conductor of the proceedings, and the session begins and ends on time and within the allotted time.

If the above conditions are met, where method independent of content is the key to developing management practitioners, concepts and techniques do get transmitted and internalized but, more importantly certain skills get developed through case-based learning processes:

- Case-based problem solving experiences enhance understanding, sensing, thinking, imagining, analysing, visualizing, decision-making, implementation, and review capabilities even as learners interact under the skilled guidance of instructors.
- Guided case-based problem solving also enables individual learners to be able to share information, present points of view, seek as well as give clarification, challenge and be open to being challenged, persuade and be persuaded, negotiate as well as mediate, identify problems as well as search for solutions, be brutally frank as well as graceful in the use of language, incorporate others' viewpoints as well as assert the value of one's own, form coalitions of ideas even as one tries to avoid the formation of cliques and cronyism, and be decisive while trying to take others forward with the decision.
- Case-based learning also helps in sensitizing participants towards recognizing the need to blend the processes, choices, and actions emerging from the interactions with operational, multi-functional, strategic, and multiple stakeholder considerations even as one tries to train oneself not to lose sight of the prevailing historical, cultural, ideological, gender, ethical, and legal sensitivities and responsibilities.

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The management education enterprise built on the case method is in danger of crumbling because of declining participant commitment to this method and its institutional framework. Declining levels of preparation, increasing levels of absenteeism, selective involvement in courses and cases depending on notions of relevance driven by career choices, minority participation in class discussions with the majority maintaining silence or indulging in piggy-back riding are some of the growing problems. The consequent erosion of the intensity and quality of within-class case analysis and interpretation leads to an overall drop in the standards of the learning process.

The result is that the spell cast by the case method evaporates and the participants see behind and beyond and may experience frustration around what they see as the fuzziness and even the poverty of content. There is neither a coherent content to stir the intellect nor is there the stimulation and the skills which come from the case method of teaching-learning once it weakens in its application.

Management educators and administrators can fall into the trap of interpreting this as a 'disciplinary' issue and move towards tighter controls, stringent directives, stiffer penalties, and stricter grading or even drop the case method and move towards lectures and presentations in a knee-jerk reaction further eroding learning intensity in practice-oriented learning interactions.

Since management education will continue to be a hash of disciplines and functions and a 'grand' or a 'middle range' theory of content linked to management practice is still a prospect, management educators will have to lift the method to a different level to continue to stir the imagination and the interest of the participants.

The manager's world of reality in a techno-globalized environment confronted by geo-political contradictions and socio-economic volatility has become more dynamic, much more complex, and considerably more unpredictable. Content mapping in the changed context will have to take the form of problem-posing and solutions-seeking educational mode. Content may have to be better segmented bringing greater flexibility in course offerings and packages. The empirical identification of content, specialization-wise segmentation of content, greater flexibility in offerings, and more learner-centric designing of content is the key to the resurrection of the case method to develop capabilities to survive in the contemporary world of high speed learning and action. The focus of learning content could be in the form of problems encountered in managerial functioning with concepts or theories being introduced in the problem solving process.

The case method itself in the problem solving mode has to evolve towards multi-disciplinary, multi-functional, cross-national team teaching. Single functional cases 'frozen' at given moments of an organizational life can no longer be of interest for electronically networked learners who know more and can learn faster.

The case method itself in the problem solving mode has to evolve towards multi-disciplinary, multi-functional, cross-national team teaching. Single functional cases 'frozen' at given moments of an organizational life can no longer be of interest for electronically networked learners who know more and can learn faster. Case reconstruction, case analysis, and case teaching could take place in a facilitated, team-based, collegial, dialogic, action learning mode. Cases could be constructed, analysed, and discussed by learner-facilitator-organizational collaboration even as a learning experience is being delivered through a dynamic interactive reconstruction, leveraging available technology. A rethink of the brick-and-mortar classroom paradigm and experimentation with small group learning structures in a flexible, open learning framework with carefully defined roles and responsibilities could be the key to the sublimation of the case method. In this approach, instructors become learning designers, mentors, and coaches and the actual management of learning can be placed in the hands of autonomous self-managed learners in control of their own destinies.

The continuance of the case method in the current 'post-mortem' mode breeds a past and static orientation which will lead invariably to even higher levels of teaching-learning mortality. The reincarnation of the case method hinges on the ability to employ the technique in a problem-posing discovery mode. Active facilitator-learner collaborative engagement in real-time case reconstruction, analysis, and generalization leveraging information and communications technology in an action learning mode is the key to bringing the world of reality closer to the world of learning.

*The past is in the present as is the future.* In this dictum is the key to the revival of the case method of teaching-learning and also the reaffirmation that the Method can still be the Message in bridging the gap between the world of *management reality* and the world of *methodical management.*

# THE FUTURE OF THE CASE METHOD FOR LEARNING IN MANAGEMENT EDUCATION

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Two key questions arise in my mind to seek an appropriate assessment of the future of the case method for learning management. What is the relevance and potential of the case method for learning management? Would the potential be realized and will the needed facilitators (cases and faculty) be available for realizing the potential? My overall assessment is that the method has *very high potential for the future*. However, whether the potential would be realized *depends* on the availability of some key facilitators to support the method. This brief reflection is an attempt to share my thoughts on the issue and the assessment.

## Potential of the Case Method

I would like to answer the questions through an understanding of the potential of the case method to add value to (would be) managers and their (likely) organizations. I will then try to delineate the types of learnings needed to enhance the value addition to managers and organizations. Finally, I will attempt to discuss and assess the potential of the case method to provide the types of learnings needed in the future.

## Managers of the Future

Managers essentially decide and implement *strategies and action plans* in a *given situation* to improve the performance of the organization and/or the system they work for. For making improved decisions, they need to *understand the situation* (both internal and external to the organization) thoroughly so that they can *use the problem solving framework* to address the critical issues facing the organization. The problem solving approach consists of identifying decision areas, generating appropriate options, specifying objectives and criteria to assess the options, evaluating the options generated, choosing an appropriate one, implementing the decision, and monitoring the situation. The decisions are made individually as well as by teams of managers. Through improved decision-making, they would not only attempt to enhance organizational performance but also achieve their own vision and career goals.

The problem solving approach consists of identifying decision areas, generating appropriate options, specifying objectives and criteria to assess the options, evaluating the options generated and choosing an appropriate one, and implementing the decision and monitoring the situation. The decisions are made individually as well as by teams of managers.

It is becoming increasingly clear that managers of the future would seek careers across organizations either in one industry or across industries. This would be quite unlike the managers of the past who sought careers in a single organization.

The management learning (education/training) programmes can be classified into the following broad categories with their respective broad participant profiles:

- ***Two-year MBA programmes***: Participants in these programmes come from varied academic backgrounds and may or may not have experience of working in organizations. They are unlikely to have a clear vision of which sector or industry they would like to join for achieving their long-term career goals.
- ***Post-entry one year MBA programmes***: Participants of these programmes are those who are currently working and who missed a quality MBA education

in the earlier part of their lives. They also are from diverse academic backgrounds. They have a better idea of the sectors they wish to join or the learning they would like to have.

- ***Short-to-medium-duration programmes***: Participants in these programmes are either on their own or sponsored by their organizations. They may or may not have formal management education/training but would have experience of working in organizations. These managers have a clearer understanding of their learning requirements as only the appropriate ones would be sponsored to such programmes.
- ***In-company short-medium-duration programmes***: These programmes are organized by corporations/organizations to align the development and implementation of their strategies across different levels of the organization. These are also used to upgrade the capabilities of the managers in general or in specific areas.

The current trends show that the future participants of two-year MBA programmes are likely to have more experience although their academic backgrounds will continue to be diverse. The current stock of non-MBA managers is so large that the demand for one year MBAs will continue to rise in foreseeable future. The profile of participants in these programmes will continue to be similar to the current one. Participants of both these types of programmes are likely to finance their studies on their own and are not likely to be sponsored by organizations. They will look for a management career in the long term. Their objectives, therefore, will be to align their learning objectives with those desired by leading organizations employing managers.

The short-to medium-term programmes for individual managers will continue to have participants who are sponsored by their organizations to strengthen the capabilities of their managers in specific need areas or for general improvement of their required knowledge, skills, and attitudes.

A recent trend has been the increasing use of customized in-company programmes by leading organizations for purposes which are similar to short-and medium-duration programmes. In other words, the leading organizations will be seen as lead users of management programmes. Participants of the other three categories of programmes would, therefore, like to have learning which is desired by leading management organizations. And the leading organizations would look for those types of learnings which add value to their stakeholders.

A key conclusion of this section is that participants of all types of programmes would like to have their learning objectives which are aligned to what are valued by leading management organizations. My assessment of value addition as desired by organizations in the future is provided in the next section.

## Requirements of Organizations in the Future

As mentioned above, the key tasks of a manager are to make decisions and implement them for improved organizational performance in the context of the organization. The organizational *context faced by managers is undergoing a fundamental change*. In my view, the key dimensions of change that are likely to significantly affect the managerial task are: the target customers, the competition, the technologies available in the external environment, and the profile of managers in the internal environment.

The organization would, therefore, have to devise better ways of sensing diverse and fast changing customer requirements and behaviour, design appropriate offers, and deliver and communicate the same.

## Future Target Consumers

Economic growth and exposure of consumers to a wide variety of global media, and products, and services will lead to increasing expectations and complex behaviour on the part of *existing target segments* of the organization. Besides, the pressures of competition and objectives of the organization will lead to the addition of *new target segments* (domestic and/or foreign). The organization would, therefore, have to devise better ways of sensing diverse and fast changing customer requirements and behaviour, design appropriate offers, and deliver and communicate the same. This would imply that managers will need to have a wide range of perspectives and capabilities individually or in teams responsible for such tasks. The change would require managers to increasingly *learn more about all functional areas and how to work in teams of members of diverse backgrounds including specialists and generalists.*

## Future Competition

It is reasonably clear that the competition in the different sectors of the economy would be much greater and much more complex. Competing organizations in a specific sector would be of different sizes, from different industry bases (usually from related industries) having diverse cultures of their own (domestic as well as foreign), and with their own diverse visions and goals. Organizations of the future, therefore, will have to build managerial capabilities to understand and assimilate competitive situations from a very wide perspective. They will also need to understand specific competitors so as to anticipate their competitive moves. By its very nature, the increasing degree of competition will make it necessary to assess the desired speed to act that is needed for countering and/or pre-empting competition. *The managers of the future, therefore, would need to be equipped with diverse perspectives, deeper knowledge, and a faster action orientation.*

## Future Employees

Recent trends in managerial behaviour strongly indicate that managers will seek careers across organizations as explained above. Organizations will, therefore, have to devise their mission and objectives which match or have the capability of matching with the vision of the employees and managers. These would also need to be communicated very clearly, particularly to retain and motivate the key employees and managers. Managers for their part will need to have the capability of understanding the vision of the organization and assess the match with their vision and career expectations.

The real value addition to a manager is perceived to be assuming a higher leadership position within the organization or outside. The way to acquire a leadership position is to demonstrate and lead the team the manager is working in through greater knowledge, better skills, and superior attitudes and action to achieve organizational objectives.

Therefore, there will be a premium on acquiring more knowledge, better skills, and attitudes to develop the leadership potential among managers. It would also mean that communication capabilities both in written and in oral form will become increasingly important.

## Future Technological Environment

All industries are facing increasing technological changes. Besides, the changes in information technology are likely to continue to pose significant challenges to all organizations. The pace of technological changes which would be of different degrees in different sectors would imply the increasing use of specialists or interaction with outside specialists (organizations) to keep up with the changes.

Most internal data and information of organizations and the external environment would be increasingly digitized. Increasing use of IT in capturing consumer data (including the increasing role of retail chains that generate enormous data on consumer purchases) would generate an increased amount of data on consumer purchases. Use of customer relationship processes will add significantly to the availability of data on purchases, profiles, attitudes, and values of consumers/customers. Internal systems would also be devised to integrate this data with primary information collected through other types of research efforts. This availability of information on external and internal stakeholders and systems would require effective ways of analysing such information. Apart from the development of new methods for analysing such data and its conversion into information, managers will have to work closely with analysts (and *vice versa*) to seek answers to crucial managerial issues.

> The important implications of the technological development for managers will be that they would need a higher degree of innovativeness to understand customer requirements in order to design, deliver, and communicate customized offers.

IT has been widely acknowledged as the means of sensing customer requirements and also designing, delivering, and communicating customized offers to consumers. As IT by itself is likely to be available to all organizations, an ability to use IT in innovative ways to differentiate organizational offers will be the key requirement of successful organizations.

The important implications of this future trend for managers will be that they would need a higher degree of innovativeness to understand customer requirements in order to design, deliver, and communicate customized offers. Close working of analysts (specialists) and managers would demand better understanding of diverse colleagues with diverse kinds of backgrounds. Once again, effective working in teams will become a key requirement.

## Implications for Type of Learning

The previous two sub-sections lead to the following conclusions on the types of learnings required for managers by leading organizations:

- in-depth understanding of subject area and identification of issues and methods of solution based on considerable data and information available
- interpersonal and communication ability to work in teams for assessing customer requirements
- improved ability of working and leading in groups to devise appropriate offers and design systems of delivering and communicating the same to customers. Increasing level of knowledge, skills, and appropriate attitudes would be the hallmark of future learning required by managers to add value to them
- improved ability to assess the need for action and enhance the attitude and the willingness to act.

## Likely Value Addition by the Case Method

The case method of learning has been found to be extremely useful in transfering knowledge, developing skills, and forming attitudes. A course or programme designed to achieve a mix of these learnings would usually have contents spanning a range of contexts, types of decisions (problems), and relevant concepts and skills needed to achieve the objectives of learning. My experience suggests that the motivation to learn is greatly influenced by the context and the type of problems depicted in cases. Well-designed courses and programmes are likely to continue to serve the learning objectives of future managers quite well.

The case method of learning has been found to be extremely useful in transfering knowledge, developing skills, and forming attitudes. A course or programme designed to achieve a mix of these learnings would usually have contents spanning a range of contexts, types of decisions (problems), and relevant concepts and skills needed to achieve the objectives of learning.

However, a key requirement of future organizations and managers, i.e., integration and use of such learning in actual job situations, is not necessarily directly addressed by the case method. Different types of programmes seem to be attempting to address this issue in different ways:

- ***Entry-level MBA programmes***: There seems to be an increasing trend to supplement the case method with field projects in different courses/subjects or offer project-based courses. The field projects help in learning the relevance of concepts in real-life applications. They also provide a framework for understanding the relevant situation, posing relevant problems/issues, generating options, choosing the right course of action, and in devising appropriate implementation and review system. A number of projects undertaken across courses and/or undergoing project-based courses provides the base for helping to frame a behaviour pattern *vis-à-vis* managerial situations.
- ***Post-entry short-duration management development programmes***: Most of the short-duration management development programmes have a sharp focus on learning objectives. However, they suffer from not acquiring an adequate ability to carry the learnings from the programme to the organizational setting. We have found it useful to put aside a reasonable amount of class time and in the writing and submission of a daily/session-wise diary where the participants reflect on how the learnings from the programme can be translated into their own situation and to what extent. This kind of intervention in the management development programmes has the potential to add significant value to the participants and their organizations. It may even extend to designing programmes which have a project element built into the programme. This could be achieved in two ways. First, participants may be asked to bring/collect relevant data/information to undertake a project in the programme. Another option could be a design of the programme with

more than one module where the participants go back and work on a significant decision problem in their own organization and return to share the learning with others in a follow-up module.

- ***In-company programmes***: Customized programmes for specific organizations have tremendous potential for value addition through introduction of a project module followed by sharing of learning through the project, as mentioned above. Our experience shows that this format is acceptable to a significant proportion of organizations if explained well.

The above would seem to be out of place for the purposes of this reflection. Such indeed is not the case. Introduction of a project component is very much like a manager trying to grapple with a significant problem. The collection and organization of data and information is much like preparing a live case followed by choosing a course of action and preparing an implementation and review plan. This methodology has the greatest potential to add value to the learning of individual manager and the actual or learning value to the organization. If followed by a discussion of the projects by the participants, the methodology can also enrich all the participants of the programme in a significant manner.

## Availability of Facilitators

I am focusing on three facilitators which are essential to realize the future potential of the case method. These are the availability of quality cases, the availability and desire of instructors for using cases, and the availability of case writers.

### Availability of Cases

The availability of cases has been improving over the last few years. The distribution of case material has improved significantly with use of IT by the distributors. The development of cases has also been aided considerably by information available through the Internet. While the availability of secondary data through the Internet has improved significantly, it is difficult to authenticate the data and information available about companies, industries, and countries. A significant proportion of new cases seem to be based on secondary information available through the Internet or other published sources. Besides doubts about the authenticity of the data, these cases do not necessarily reflect the situation as faced by the managers. There is a greater need for writing field-based cases along with authenticated secondary information on important elements of the situations faced by managers. Only then will the purpose of contextualizing the management decision-making be served by the programmes. An important determinant of the use of cases in the future would be the availability and motivation of instructors to use cases for the learning programmes.

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### Availability and Motivation of Instructors

It is well known that the case discussion leader needs a significant amount of time to prepare the case and customize the discussion to achieve the learning objectives of the participants having diverse profiles. More instructors are likely to use cases if they need to put in less effort. This could be achieved partly through the availability of teaching notes for cases. However, the effort level does not necessarily go down significantly. There is a significant need on the part of institutions to recognize the effort of using cases in programmes and courses and devise effective ways of rewarding case instructors for their efforts appropriately.

### Availability of Case Writers

Most cases are written by academics/instructors. There is also a trend towards programme participants and managers taking up case writing on their own or in collaboration with academics. The quality of cases can be improved by organizing the training of academics and managers (interested in such activity). Collaborative efforts by managers who know the situation well and the academics who understand the learning value of a situation well would go a long way in developing quality cases.

A case writer would be more interested in writing cases if the reward was greater than the cost, namely, net value addition. For managers, the reward would be a secondary issue as their primary rewards come from their major occupation of being a manager. However, they would also possibly need some kind of reward from both their own organizations and/or academic and professional organizations. Ways need to be found to reward the case writing efforts of managers by industry and academic/professional organizations to encourage the trend further in order to get a large quantity of cases.

Academicians, for whom case writing and the use of cases are primary activities, are likely to look for rewards which enhance their academic career. Management journals which publish cases are only a few in number although the number seems to be increasing of late. The opportunities for publishing cases are limited. Besides, the academic institutions which decide the rewards for academics do not seem to consider case writing as an activity equivalent to other research efforts. In such a situation, improvement in the motivation of case writers would require the availability of more journals which publish cases and consideration of quality cases as equivalent to other research publications. Academic organizations need to take a lead in this effort.

A case has the potential to contribute to research by identifying a new managerial situation, a new context and develop a new skill or the potential to explore the possibility of a new concept. It could be more like an exploratory research in search of new concepts, contexts, problems, and theories related to the field of applied management.

Conceptually, a well-written case requires considerable depth of understanding and knowledge of the situation and relevant information. The effort in data collection of field-based cases requires time and monetary support. Organizing and presenting the information is an intellectual task. A case has the potential to contribute to research by identifying a new managerial situation, a new context and develop a new skill or the potential to explore the possibility of a new concept. It could be more like an exploratory research in search of new concepts, contexts, problems, and theories related to the field of applied management. The onus to prove whether it is so rests with the author of the case by providing a teaching note which could highlight a significant academic contribution besides providing a class strategy and the experiences of past class strategies used. *Thus, case writing is really an activity of (new) search and not merely research.*

My assessment is that availability of cases particularly based on secondary information will increase in future through academics. Managers could make a significant contribution to the writing of quality cases. This would require the identification of key issues faced by managers and grounding them in available concepts through collaboration with academics. There seems to be an increase in the publication of cases which require the authors to write teaching notes. This movement needs to be encouraged particularly by academic organizations who use the case method as their dominant method of learning. Besides, all management and academic institutions need to recognize case writing as a research area and reward case writers for the quality of their efforts.

## Conclusion

On the whole, the case method of learning adds significant value to the learners and their (potential) organizations. The value lies in learning to assess *the situations* faced by managers and in learning the use of *knowledge, skills, and attitudes* needed to use the problem solving approach to achieve organizational objectives as well as the objectives of managers. Supplementing the traditional case method with field projects will help in developing the requisite *habits* of appropriate decision-making. The field projects also have the potential of making the learning contemporary compared to an existing case pertaining to a past situation. Through this method, the future learning objectives of the organizations are likely to be met very well.

The availability of cases is likely to improve in the future. However, the availability of cases based on real-life situations needs to be encouraged through collaborative writing by academics and managers. The use of the case method purely as a way of learning may add value to the instructor by way of appreciation by participants. Publishing of more journals devoted to case and case research would add more value to the academics engaged in the writing of cases through the enhance-ment of their publication record. Further, the academic institutions need to develop appropriate reward mechanisms for motivating case discussion leaders and case writers for achieving the potential of the method for organizations and managers in the future.

To sum up, the potential of the method is very high. However, actualizing the potential would depend on the realization of value addition by the academic organizations and taking appropriate actions to promote the use and writing of quality cases.

## SUMMARY

The participants of the colloquium have broadly argued that the case method has a future in management education in India provided educators are sensitive to the changes in the academic and economic environment. These changes, however, will become threats rather than opportunities unless instructors take corrective action to add value in whatever ways they can to the method rather than expect the method to perform magic on its own. In other words, the viability of a pedagogical instrument depends on the ethical commitment, the knowledge base, and the teaching skills of its practitioners. And, most importantly, the commitment to the case method is not an event; it is a process that requires constant renewal. This process of renewal then depends on our ability as instructors to innovate effectively within the frame of the method. The modalities and the locus of such innovation, as the contributors point out, are many. They can range from the recent emergence of multimedia technology as a form of cultural memory to the need for a greater degree of sensitivity to cultural differences that affect the receptivity to the method in classrooms in different parts of the world. In other words, the 'culture of technology and the technology of culture,' to invoke a post-modernist formulation, not only matter, but are implicated in each other. Technology and culture are not just social phenomena but the very framework in which we demarcate the space of institutions today.

It is within the political protections and privileges of these institutional spaces that we attempt the 'willing suspension of disbelief' that is embodied in the case method. While the formulation given above was used originally to describe the nature of an audience's involvement with poetic fictions by Samuel Coleridge, it captures quite well *the representational function of the case method*. We cannot go directly to the field but, we would nevertheless like to get 'a feel of the field' in the classroom. But we cannot get a feel of the field unless the case is well written. After all, in being forced to occupy the locus of the decision-maker, one cannot, as a participant in the case discussion, pretend that all this is happening to someone else. We have to get involved without too many defences. Hence, 'objective' knowledge or 'theoretical competence' alone will not save the day. The participant must be willing to let go; that is, 'suspend disbelief,' and go with the flow of the discussion in the class.

The participant playing the role of the decision-maker must *stomach the demands* of the case situation as though it was real and that his or her own integrity as an executive capable of 'rational decision-making' was at stake. And, the instructor, for his or her part, anchors the discussion by pushing the participants to acknowledge *both the intended and unintended consequences of their decisions.*

The participant playing the role of the decision-maker must *stomach the demands* of the case situation as though it was real and that his or her own integrity as an executive capable of 'rational decision-making' was at stake. And, the instructor, for his or her part, anchors the discussion by pushing the participants to acknowledge *both the intended and unintended consequences of their decisions*. It is the emotional labour involved in this process of anchoring that is generally in short supply; hence, the need for institutional processes that will legitimize the expenditure of class, faculty, and student time in the case method. Let us not underestimate the discursive loops and deceptive lures awaiting the novice and the unprepared who rush to a decision in a case discussion. The case method, however, is not without its dangers; a bad lecture will probably do less harm than an incompetent case discussion.

And, again, there are also those who are too-clever-by-half and mime 'class participation' in order to take advantage of the open-endedness of the method. For this class of students, a few extra marks are infinitely more important than the vicissitudes of decision-making. In any case, since they have no desire to be managers or manage anything apart from the need to '*manage* the case discussion' (as opposed to '*engaging* in case discussion'), they experience no guilt about sabotaging the class with their 'participation.' This category of trouble makers represents one of the greatest dangers to the case method; they are, in HBS parlance, the 'hierarchy of smart alecks.' They think that the instructor who refuses to fast-forward the discussion to be either foolish or plain senile. This category of participation is by no means synonymous with students (since the instructor himself is not immune to this form of pedagogical idiocy in a moment of ignorance, nervousness or identification with the student). This problem is being exacerbated as academic institutions cave in to inside and outside pressures to increase student in-take without giving sufficient thought to standards. Hence, there is a need to understand the role of institutional theory and practice in the design and implementation of management programmes using the case method.

As instructors, we must cultivate an ethical approach to the case method and not invoke a theological stance when we feel threatened by the indifference of a student for whom we are at best a 'course requirement,' or, at worst, an 'exit barrier' to placement that must be negotiated with cynical deftness.

Finally, we must recognize that as instructors, we must cultivate an ethical approach to the case method and not invoke a theological stance when we feel threatened by the indifference of a student for whom we are at best a 'course requirement,' or, at worst, an 'exit barrier' to placement that must be negotiated with cynical deftness. Just as we suffer the ethical compulsion to openness in classroom discussion using the case method, we must analogously cultivate openness in evaluating our ability to do so when given the institutional space and opportunity. We must be willing to supplement our efforts, whenever necessary, with additional efforts (as the participants of the colloquium point out) by encouraging field-based projects, cultivating an on-going commitment to interact with industry, deploying gaming and simulation technologies when necessary, etc. But, amidst our desire to experiment, we must also remember that insofar as our efforts emerge out of something called the case method, we must (in the words of John McArthur, a former Dean of HBS) hold fast to the axiom that '*how* we teach, is *what* we teach.'

*We get new ideas from God every hour of our day when we put our trust in Him — but we have to follow that inspiration up with perspiration — we have to work to prove our faith. Remember that the bee that hangs around the hive never gets any honey.*

*Albert E Cliffe*