**Rethinking the Use of Case Studies to Prepare Effective Managers**

*Introduction*

Since Harvard Business School pioneered the use of case studies to teach students how to lead and manage organizations, the use of case studies has become ubiquitous in business school education worldwide. Traditional case studies strive to help students better understand management theories and practices and to gain skill in using sound theories to engage in effective management of organizations. However, traditional case studies tend to be contained business stories about an organization at a moment in past time, written by an author(s) who selects and collects limited information about the organization's situation or experience, and studied in present time by students who have no connection or existential experience with the organization.

As McHann and Frost (2010: 1) assert, "the typical case study, like many instructional techniques used in business schools, is still relatively theoretical in that it is not a business experience in which the student is personally involved." For this reason, the traditional case study is not truly a tool of experiential learning, even though it is commonly assumed to be so. Nonetheless, the traditional case study is perhaps the most ubiquitous teaching tool used in business education at a time when many business schools are striving to transform their preparation of students by emphasizing more experiential learning of management theories and practices.

Some other teaching tools move the learning experience down the continuum from theoretical to experiential or authentic learning. Some examples are active learning activities that occur inside classrooms; live cases that instructors design and arrange with outside organizations to engage students in short-term, employer-assisted study projects; and learning journals (mini living case studies) that guide students into acquiring, interpreting, and applying information to their current personal and professional experience. Living case studies are a particularly flexible and *innovative* teaching tool that can connect students to situated learning opportunities within *collaborative* organizations in the

community, and they can be used in a wide variety of management courses to increase students' experiential learning. In living case studies, instructors structure and guide student-centered, open-ended explorations of interpreting and applying management theories to present-time, real-world organizations where students work or where they may wish to work in the near future.

This activity/exercise session will define, describe, and distinguish the living case study from traditional case studies, live cases, and other experiential learning tools. It will give several examples of how living case studies have been used successfully in different courses, and it will generate exploratory discussions of additional ways that this approach to experiential learning can be used in various business subjects.

Living case studies can be designed for early undergraduates, late undergraduates, and graduate students at the master's and doctoral levels. They can be used with traditional students, but they are especially effective for students who are working part-time or full-time, which increasingly is becoming the norm in many business schools.

*Theoretical Foundation/Teaching Implications*

There is a growing literature on how business schools need to transform their approach to preparing students to be effective leaders and managers in organizations by helping students to move more effectively from theory to practice. This research literature goes back fifteen to twenty years now, and more business schools have begun to heed the calls to transform their business education to more closely resemble some other professional schools, e.g., like medical schools. As Pfeffer and Sutton (1999: 137) point out, "In surgery, there is an old saying that describes how residents learn a procedure: 'Hear one, see one, do one.' In business education, the saying would go, 'Hear one, talk about one, talk about one some more.'" The question is "How do we do this?" Here are a few *sample* references for this literature:

Datar, S., Garvin, D., & Cullen, P. (2010). *Rethinking the MBA: Business education at a crossroads.* Boston, MA: Harvard Business Press.

Mintzberg, H. (2004). *Managers not MBAs: A hard look at the soft practice of managing and management development*.  San Francisco, CA: Berrett-Koehler.

Pfeffer, J., & Sutton, R. (1999). The smart-talk trap. *Harvard Business Review*, 77(3): 134-142.

Pfeffer, J. & Sutton, R. 2000. *The knowing-doing gap: How smart companies turn knowledge into action*. Boston: Harvard Business School Press.

Embracing this challenge, we draw upon an interdisciplinary field of thinkers from the early twentieth century to the present day who have been laying the theoretical foundations for new perspectives on thinking, learning, and knowing. These broad philosophical and interdisciplinary perspectives have led us to some very focused theoretical work within education learning theories. In particular, we have drawn on the research literature on situated learning theory and one of its practices, authentic learning. Here are a few *sample* references for this literature:

Bernstein, R. J. 1983. *Beyond objectivism and relativism: Science, hermeneutics, and praxis*. Philadelphia: University of Pennsylvania Press.

Cognition and Technology Group at Vanderbilt. (1990). Anchored instruction and its relationship to situated cognition. *Educational Researcher*, 19(6), 2-10.

Dewey, J. (1933). *How we think: Restatement of the relation of reflective thinking to the educative process*.  Boston, MA: Heath.

Driscoll, M. (2018). Psychological foundations of instructional design. In R. Reiser & J. Dempsey (Eds.), *Trends and issues in instructional design and technology* (pp. 52-60). New York, NY: Pearson.

Herrington, A. & Herrington, J. (2006). What is an authentic learning environment? In T. Herrington & J. Herrington (Eds.), *Authentic learning in higher education* (pp. 1-14). Hershey, PA: Idea Group.

Ladyshewsky, R. & Ryan, J. (2006). Peer coaching and reflective practice in authentic business contexts.  In T. Herrington & J. Herrington (Eds.), *Authentic learning in higher education* (pp. 61-75). Hershey, PA: Idea Group.

Lave, J. (1988). *Cognition in practice: Mind, mathematics, and culture in everyday life.* Boston, MA: Cambridge University Press.

Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation*. New York, NY: Cambridge University Press.

Luhmann, Niklas (1990). Essays on self-reference. New York: Columbia University Press.

Piaget, J. (1971). *Psychology and epistemology: Towards a theory of knowledge*. New York: Grossman.

Pittaway, L. & Cope, J. (2007). Simulated entrepreneurial learning: Integrating experiential and collaborative approaches to learning. *Management Learning*, 38(2), 211-233.

Schell, J., & Black, R. (1997). Situated learning: An inductive case study of collaborative learning. *Journal of Industrial Teacher Education*, 34(4), 5-28.

Vygotsky, L., & Cole, M. (1978). *Mind and society: The development of higher psychological processes.* Cambridge, MA: Harvard University Press.

Wenger, E. (1998). *Communities of practice: Learning, meaning, and identity.* Cambridge, UK: Cambridge University Press.

Wenger, E. (2000). Communities of practice and social learning systems. *Organization*, 7(2), 225-246.

Wenger, E., & Synder, W. (2000). Communities of practice: The organizational frontier. *Harvard Business Review* 78(1), 139-145.

Wenger, E., & Wenger-Trayner, B. (2015). Communities of practice: A brief introduction. Retrieved from http://wenger-trayner.com/introduction-to-communities-of-practice/ Whitehead, A. N. (1929). *The aims of education and other essays*. New York, NY: Macmillan.

Wilson, B. (2018). Constructivism for active, authentic learning. In R. Reiser & J. Dempsey (Eds.), *Trends and issues in instructional design and technology* (pp. 61-67). New York, NY: Pearson.

Wittgenstein, L. (1953). *Philosophical investigations*. Oxford, UK: Blackwell.

Also, we have been using these growing theoretical understandings to practice using living case studies in a variety of business school courses we have taught over ten years at the undergraduate, master's, and doctoral levels. We are beginning to present, write papers, and publish on subjects related to this topic. Here are a few sample references for this literature:

Frost, L., & McHann, J. (2019). *Exploring the infusion of individual and organizational resilience into management courses*. Paper presented at the System Dynamics Society Conference 2019: Resilience and Sustainability in a Changing World, Albuquerque, New Mexico; July 21-25. •

McHann, J., & Frost, L. (2019). *Living the mission: Delivering a practical business education through authentic learning.* Paper presented at the MBAA International Annual Conference, Chicago, Illinois, USA, March 27-29.

McHann, J*.*, & Suntornpithug, N. (2019). *Recipes for transformative learning experiences: Assignments designed to connect course content to situated learning contexts*. Presentation accepted for the Indiana Teaching and Learning Conference, Fort Wayne, IN, February 22.

McHann, J. (2012). Changed learning needs: Some reflections on B-school education. In J. Marques, S. Dhiman, S. Holt (Eds.), *Business administration education: Changes in management and leadership strategies* (pp. 105-238). New York: Palgrave-MacMillan.

McHann, J. & Frost, L. (2010).  Integrating experiential learning into business courses: Using learning journals to create living case studies.  *American Journal of Business Education*, 3(8), 1-12.

*Learning Objectives*

By the end of this activity/exercise session, participants will be able to do the following:

- Appreciate the value of using more experiential learning experiences to prepare students for the professional practice of managing effectively in organizations.

- Discuss the strengths and weaknesses of the traditional case study approach to preparing business school students to manage effectively in organizations.

- Explain how or why various teaching tools fit on a continuum from theoretical to experiential learning experiences.

- Describe in useful detail the strengths and challenges of using living case studies to increase students' experiential learning of management theories and practices.

- Design an effective living case study experiential learning experience for a management course they teach.

*Exercise Overview*

The activity/session will run for one hour, and it can accommodate however many participants can fit comfortably in the room designated for the session. During the first 15-20 minutes of the session, the co-presenters will describe 1) the need for business schools to innovate a new educational approach that includes more experiential learning experiences; 2) the strengths and weaknesses of the traditional case study method as a teaching tool; 3) the criteria for determining where on a continuum from

theoretical to experiential a particular teaching tool falls; 4) the specific characteristics and forms living case studies can stake; and 5) examples of different living case studies designed for different courses. There will be enough content presented here to ensure that everyone is clear about the main ideas and themes of the session. Participants will be encouraged to ask clarifying questions or make comments during this first 15-20 minutes as needed.

This will be followed by a 10-15 minutes portion of the session where specific guided questions will be asked to stimulate participants to comment and share their views and insights on the topic. The goal here will be to clarify, to enrich, and to stimulate further thinking about the dynamics and goals of living case studies.

This will be followed by a 10-15 minutes portion of the session where each participant is encouraged to try to create the beginning elements of a living case study assignment for one of the courses they teach. A guiding template will be provided on one-two sheets of paper that can help them think through and briefly jot down some of the relevant issues like management topic, objectives, assignment structure, components, and dynamics.

The concluding 10-20 minutes portion of the session would encourage several participants to share their incipient thoughts about a possible living case study assignment that they could create for one of their courses. We would encourage and lead group discussion on the ideas shared and try to use this discussion to achieve our learning objectives for the session.

*Session Description*

This activity/exercise session focuses upon the continuing need business schools to develop *innovative* teaching tools that facilitate experiential learning of sound management theories and effective management practices. We will note some of the strengths and weaknesses of the traditional case study method of teaching. We will describe how different teaching tools fall on a continuum from theoretical to experiential learning, and we will focus upon how to develop and use living case studies in *collaboration*

with situated learning opportunities in the community within a wide variety of management courses to increase students' experiential learning. The first 15-20 minutes of the session will be used to present sufficient content to stimulate 10-15 minutes of clarifying discussion on the topic, followed by 10-15 minutes of workshop activity, and concluding with 10-20 minutes of sharing workshop ideas and concluding discussion.