

Letter from the Editor

Rebecca J. Morris

The case for teaching with cases

In a 1920 memo outlining the vision for the Harvard Business School, Dean Wallace Brett Donham wrote about the focus for business education. Students should “be required to investigate facts, to sort undigested material, to state problems, to analyze problems, to reach conclusions and to present the subject matter and HIS decision orally and in writing, as HE will be required to do in business [...]” (emphasis added as of course there were only MEN in the business school in 1920). Inspired by this vision, Harvard professors developed a “problems” approach to teaching, creating the first casebook for use in marketing classes in the Fall of 1920 (Copeland, 1958b). In the almost 100 years since “problem-based learning” was implemented at the Harvard Business School, the case method has become well established in many business courses such as Business Policy and Strategy, Marketing Strategy, Business Ethics, International Business and others. Why should instructors incorporate cases into their pedagogy? Cases provide an effective way for students to develop essential skills and capabilities that will become important in their business careers. These skills are listed below.

Cases promote higher order thinking

The best cases take students from mere knowledge and comprehension to application, analysis, synthesis and evaluation (Bloom *et al.*, 1956). Students must learn how to apply course knowledge to case situations that are rich with the complexity of the real world. Students often must apply analytical tools to develop solutions to these problems. Finally, they must critique alternative solutions and justify their recommendations. These critical thinking skills are seldom reached using alternative teaching methods.

Cases provide practice in decision making in a safe environment

In studying cases, students assume the role of the decision maker and are confronted with all of the challenges of the situation. Cases provide opportunities for students to formulate and justify business decisions without putting real companies at risk. Through case studies, students build decision-making skills that are beneficial to their careers.

Cases expose students to new worlds

Many students have not had the opportunity to travel extensively or to have worked in a variety of industries. Case studies open the door to the world for these students by exposing them to situations in other countries or in industries that are new and unfamiliar. Cases can broaden the thinking of students beyond their limited experiences.

Cases bring real-world business experiences into the classroom

Cases published in peer-reviewed journals such as *The CASE Journal (TCJ)* are based on factual descriptions of actual business situations[2]. Case writers are expected to describe the business scenario without bias or injecting their own opinions. Direct quotations from people involved in the situation are used to avoid the introduction of biases through the case writer’s attempt to paraphrase (Naumes and Naumes, 2012).

Case teaching will become increasingly more important due to changes in accreditation standards. AACSB standards have long included analytical thinking and the application of knowledge as general skills that should be incorporated in the curricula of top business programs. In 2018, the “Integration of real-world business experiences” was added in the General Skills Area (AACSB International, 2018). When these standards are implemented in January 2019, schools and colleges accredited by AACSB must demonstrate that the institution’s curriculum includes



real-world business experience or provide an acceptable explanation of why it does not. While internships, consulting projects, and guest speakers can be pedagogical approaches for providing students with real-world experiences, cases are uniquely situated to provide an approximation of real-world experiences to large numbers of students in a variety of courses.

Cases encourage the development of effective communication skills

Case discussions require students to formulate a position and articulate it successfully to others (both orally and in writing). Students also learn to critically evaluate the arguments of others through the interactivity of real-time discussion. In writing, students must learn to communicate their position and to provide facts and analytically based justifications for their recommendations. These are communications skills that are highly valued in the workplace.

Cases stick with students beyond the classroom

The best case studies provide learning experiences that are often remembered beyond the student's time at the university. Students frequently report drawing upon concepts learned via case study when solving business problems years after graduation. Students may remember the issues of a particular case and apply what they have learned to career challenges much more effectively than they may recall theoretical concepts.

TCJ's emphasis on case teaching

How does *TCJ* ensure that the cases we publish deliver the skills and capabilities students need? We do it in three different ways – through our editorial policies, our requirements for the instructor's manual (IM) and our peer review process. We strive to publish only the highest quality cases – those that provide effective student learning.

As mentioned above, *TCJ* features “factual teaching cases and case exercises spanning the full spectrum of business and management disciplines (Emerald Group Publishing, n.d).” *TCJ* cases are about real people facing real issues – delivering essential real-world business scenarios to students. *TCJ* requires authors to adhere to best-practice case research and writing methodologies to make certain our cases are among the best available.

TCJ peer-reviewed IMs are among the best in the industry. We believe it is imperative that adopting instructors are able to teach any *TCJ* case as well as it might be taught by case authors. Our IMs contain learning objectives that develop critical and analytical thinking skills. Teaching strategies outlined in the IMs often provide assignments that provide opportunities for developing oral and written communication skills. Students develop decision making skills with *TCJ* cases by sifting through the facts of the case, identifying problems and developing solutions. In justifying recommended solutions, students learn persuasive communication skills. Our reviewers carefully evaluate the IM to confirm that the case will provide an effective learning experience for students – learning objectives, teaching strategies and discussion questions must all be interconnected and course appropriate.

Lastly, and most importantly, all *TCJ* cases and IMs are meticulously peer-reviewed by editorial board members and reviewers. Each case is assigned to two reviewers in a blind review process. Reviewers are chosen for their expertise in case research and writing and/or their subject matter expertise. Many of our reviewers are award-winning case teachers who have a strong feel for how a case will work in the classroom. Others have deep knowledge in particular areas of business practice that they can draw upon in evaluating a case. Our reviewers are from all parts of the world, providing an understanding and appreciation for cultural and geographic aspects that may be relevant in a case. Although the reviews may be critical of the case or IM, *TCJ* reviewers provide constructive and actionable feedback to enable authors to bring their case up to our publication standards. Our ultimate goal is to publish high quality cases that deliver outstanding learning experiences.

In this issue

This issue includes four cases (see Table I) focused on a wide variety of companies, locations and issues. Each case has a strong IM providing effective teaching strategies, theoretical linkages and complete answers and analysis to all discussion questions. *TCJ* IMs have been rigorously peer reviewed to ensure that adopting faculty can teach these cases as well as the authors. Enjoy! (Table I).

Table 1 Cases in this issue

<i>Case title and target audience</i>	<i>Authors</i>	<i>Synopsis</i>
General Patton and Lieutenant Winters: A contrast in leadership Audience: Undergraduate management or leadership courses	Jordan Swain and Lissa Young	This video case study uses excerpts from the movie Patton and the HBO series Band of Brothers to juxtapose two military leaders (General George S. Patton and Lieutenant Dick Winters) as they face strikingly similar situations – each interacts with a subordinate experiencing “battle fatigue” (a.k.a. shell shock, PTSD) during the Second World War. Patton seems to lack emotional intelligence as he apparently loses control and strikes a soldier he believes is demonstrating cowardice. Winters, on the other hand, takes a much different approach when dealing with a subordinate in a similar situation.
The Durango Area Tourism Office (DATO)’s Marketing Dilemma: To Market marijuana businesses or not Audience: Courses in Services Marketing, Tourism Management, Destination Management and Tourism Development	Lorraine Taylor and Deborah Walker	This case is designed to augment assigned theoretical readings and increase student conceptual and practical insight into the construct of emotional intelligence. Andrea Seid was responsible for tourism marketing in a destination management organization in Colorado. In her position, she faced a difficult decision of whether to promote marijuana related businesses on her website and in the local welcome centers.
Wockhardt Limited: will it rise from the ashes? Audience: Graduate and Executive Education Programs in Corporate Finance, Mergers and Acquisitions, International Financial Markets, and Corporate Restructuring and Valuation	S.R. Vishwanath, Jaskiran Arora, Durga Prasad and Kulbir Singh	The case demonstrates how currency mismatches create exposures, why and how companies hedge (or do not hedge) those exposures, alternate valuation models and the use of foreign currency convertibles in funding a global expansion program. The case highlights the ambitious growth strategy of Wockhardt, a global biopharmaceutical company. In a bid to dominate the biopharmaceutical market, Wockhardt grew aggressively by acquiring companies all over the world. This expansion was funded by a mix of secured loans (bank borrowings) and unsecured loans including foreign currency (US Dollar denominated) convertible bonds (FCCBs). Due to deteriorating business and economic conditions the company experienced a sharp decline in profitability and stock price resulting in a debt overhang. The company had to restructure its capital structure in March 2009 to escape bankruptcy. Since FCCB holders did not agree to restructure the terms of the instrument, the company had to turn to senior lenders to restructure debt.
Office space: A leadership challenge Audience: Undergraduate and graduate courses in leadership and management	Jordan Swain, James Tuite and John Borland	The case describes the dilemma a young leader, First Lieutenant Toomey, faces after arriving at a new organization. Toomey’s subordinate (Sergeant First Class Rodgers) is more experienced and accomplished and has enjoyed a degree of autonomy under Toomey’s predecessor. Rodger’s demeanor and the physical setup of the joint office space speak to a dysfunctional dynamic in an organization that values a traditional hierarchy and relatively high power distance between supervisor and subordinate. The potential for conflict exists as Toomey contemplates how to address the dysfunctional norms he has observed while maintaining a functional relationship and reputation as an effective leader in his new unit.

Notes

1. As quoted in (Copeland, 1958a)
2. For more about TCJ’s requirements for factual cases, see Morris (2017)

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