**CASE METHOD TEACHING: CREATING KNOWLEDGE IN THE CLASSROOM**

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The case method is a teaching methodology used in nearly all business schools. The purpose of the case is to mimic problems of the business world and develop skills in students necessary to be successful. When utilized, the case method has many advantages and disadvantages. However, the case method also can be an instrument to create knowledge. Teachers and students work collaborative, sharing power, and creating a learning community that continually creates knowledge from diverse and varying viewpoints.

*Keywords:* Case method, knowledge creation, diversity

**Introduction**

Cases have long been used as a teaching staple in most business programs. The intent of a case study is to bring real life business situations into the classroom. A case study is a “description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person or persons in an organization” (Herreid, 2013, p. 50). Students are presented with a business situation in which they are required to identify the key issues, analyze why the issues are important, and make recommendations on a course of action. As part of the process, students learn both hard and soft skill sets that are transferable to the workplace.

Although the case method is the popular form of instruction in top business schools, the amount of usage of the case method varies greatly (Bryne, 2012). According to Bryne (2012), Harvard Business School utilizes the case method almost exclusively with an 80% usage rate. The University of Western Ontario’s Ivey School and the University of Virginia’s Darden School reported that the case method accounts for 75% of their instructional method. UC-Berkeley’s Haas School and North Carolina’s Kenan-Flagler School reported that only half of their courses are delivered via the case method. Conversely, business schools including Michigan’s Ross School, Notre Dame’s Mendoza School, and Oxford’s Said School only use the case method 25% of the time (Byrne, 2012).

Business cases are prevalent in nearly all business disciplines. Cases can be used in highly quantitative courses such as Accounting and Finance, to complex courses such as Business Law and Negotiations, and more soft skills courses like Leadership and Human Resources. Additionally, much of the materials contained in the cases involved skills that can be practiced in the classroom. Cases are not limited to the transmitting knowledge to students in the classroom. Although not a primary objective, utilizing the case method in the classroom can be a means of creating knowledge.

**Advantages of the Case Method**

The case study method provides several advantages over traditional teaching methods.

The case study method provides learning beyond basic facts or knowledge. Case study teaching involves identifying and applying relevant knowledge in specific situations and coping with the problem-oriented, interdisciplinary nature of the real world that involves synthesis, judgment, and application (Lynn, 1999, p. 38). As a result, students are engaged in learning at increasing levels of higher order thinking.

Case study teaching creates a learning partnership between teachers and students (Barnes, Christensen, & Hansen, 1994, p.24). Traditional lecturing emphasizes teacher power over the students. The teacher has the knowledge that is distributed to the students. A case studies classroom involves sharing power and ownership of the classroom between students and teacher. How much power the teacher delegates to the students is dependent upon the individual instructor. The more power that is given to the students, the more ownership The partnership creates a dynamic learning environment in which the responsibility and accountability are shared by the students and teacher rather than solely by the teacher. Students are more likely to ‘buy in’ to learning when they have a responsibility in the success of the endeavor.

The case study method promotes the creation of a learning community (Barnes, Christensen, & Hansen, 1994, p. 25). A learning community involves a group of people that support rigorous intellectual analysis and group collaboration. In such an environment, students are immersed in the learning process. As a result, students are more civil to each other, take more risks, and have a great appreciation for diversity including backgrounds, personality, questions asked, learning styles, and frames of interpretation (Barnes, Christensen, & Hansen, 1994, p. 26).

Case method teaching also creates alliances with students (Barnes, Christensen, & Hansen, 1994, p. 28). Too often, classrooms are very cold and formal settings. Traditional lectures add to the formalness of the teacher/student relationship. Because of the shared responsibility associated with case method teaching, teachers are required to make alliances with students. The amount of power that is transferred to the students is dependent on the individual faculty member. The more power that is transferred, the more ownership the students take over the course. The more ownership students have, the more likely they are to learn the course material. The classroom becomes a warm, informal learning setting with both teacher and student working together for shared learning. Teachers and students work together to not only ‘crack a case’, but create and maintain a culture of shared learning. By working together, learning occurs beyond the intended objective of the case itself.

Case method teaching requires teachers to have the dual competencies of mastering process and content (Barnes, Christensen, & Hansen, 1994, p. 32). All teaching methods require teachers to be masters of their discipline. However, case study teaching requires teachers to master the teaching and learning process as well. Teachers must continually balance helping students master the content of the subject matter while creating a learning environment that enables student learning. The resulting learning environment is an exhilarating place for both teachers and students to thrive.

Although somewhat contrary to conventional learning, an advantage of case method teaching is ambiguity (Lynn, 1999, p. 16). In a good case study, there is no ‘correct’ answer, way of thinking, solution to a problem, or method to analyze a situation. Rather, students are required to find a potential solution, and argue their point of view to others. Not only does it teach students important business concepts, it requires them to communicate effectively, listen to other points of view, and learn to value the diversity of ideas others present. Those ‘soft skills’ are particularly important in a diverse work environment that requires workers to interact with others.

Case method teaching also helps with the critical skills of problem solving, analysis, decision making, and coping with ambiguity (Boston University, n.d.). Unlike a traditional classroom, case method classrooms require students to put themselves into real life situations. Real life situations are often messy, with no correct answer. Rather, there are a multitude of potential solutions. As a result, students must employ problem solving skills, develop elaborate analytical techniques, and rationalize their decision making. Although operating in ambiguous situations, students learned the value lesson reducing risk, lessen ambiguity, and make the most rationale situation given the circumstances.

**Disadvantages of the Case Method**

Although a power teaching method, case method teaching is not without its drawbacks. Some critics feel that cases are unreal and artificial decision making (Clawson & Haskins, 2006, p. 125). Even though cases are based on real life situations, it is difficult to simulate actual business situations in a classroom setting. Students may not take the situations seriously enough to simulate the pressures of the business world. Consequently, the skills that the case study helps develop may not come to fruition.

Another disadvantage of the case method is its dependency on a quality instructor (Clawson & Haskins, 2006, p. 125). The case method requires a teacher who is both competent in their respective fields as well as process of choreographing a case. Additionally, the success of the case method is partially dependent upon the personality of the teacher. Teachers who lack enthusiasm over a particular case may easily lose the attention of the students. Teachers have to master the ability to deliver consistent performance with each case similarly to an actor or actress. However, that requires a teacher dedication is necessary to master both process and content.

Case method teaching also places the teacher in a vulnerable position (Clawson & Haskins, 2006, p.125). Because of the nature of case study process, teachers must think and act in real time. Consequently, students will continually question the teacher knowledge of the subject matter as well as the learning process. It also demands that teachers make personal relationships with their students. Relationship building is a time consuming process. From an instructional design standpoint, it is very difficult to consistently deliver the same learning experience across different sections and instructors. Although the cases may be the same, the student experience may not.

Case method teaching is also time-consuming. It may take an instructor five to 10 hours to prepare for one 90 minute class (Clawson & Haskins, 2006, p.126). It may also require a teacher five or six times to start to see patterns that develop in the case. However, it is a balancing act. Cases must continually be updated or changed for relevancy. In turn, it requires teachers to continually prepare new cases. Otherwise, their classes become stale and student learning decreases. Ultimately, a good case teacher is constantly preparing new cases and finding new ways to help students learning within the case method.

Case method teaching is an open-ended process that transfers some of the classroom power to the students (Clawson & Haskins, 2006, p. 126). Teachers feel that they have certain material to cover and the case method process detracts from that coverage. If that material is not covered, the teacher feels like that they are not doing their job. Teachers also fear that giving students control in the classroom with result in mass chaos with little learning occurring. Some feel that students don’t have the maturity to have a role in their education.

The success of the case method is primarily anecdotal. Many skills such as problem solving, communication, and critical thinking can clearly be demonstrated. However, little evidence exists that students learn more in a case method classroom than a traditional classroom. Students may or may not acquire more knowledge in a case method classroom. One measure of the success of the case method is the usage by business schools. As stated earlier, there is great variability in the usage of the case method at top business schools. Harvard uses the case method in 80% of its courses while Cornell only uses it 25% of the time. Both institutions graduate students that are successful after graduation (Bryne, 2012).

**Creating Knowledge in the Classroom**

In a traditional classroom, the teacher is the keeper of knowledge and disperses it when the students are ready to learn. Although effective for large groups and knowledge based material, it is limiting to the type and amount of knowledge dispersed. The case method offers an alternative means of transferring knowledge to students. Because the students are active participants in the learning process, the case methods creates a learning environment in which students help create knowledge in the classroom.

When a student enters the classroom, they bring with them previous knowledge, skills, and abilities. Often, an instructor does not tap in the richness of student experiences to aid in instruction. Case method teachers not only acknowledges previous student experience, they utilize them to help create knowledge. When presented with a case, students must demonstrate mastery by applying previous experiences to the problems or issues illuminated in the case. If the class relied sole in applying previous experience, the value of the case method would be lost. Rather, students share their thoughts, ideas, and point of view with the rest of the class. As the class progresses, the product of student interaction cumulatively creates knowledge beyond that of the material presented in the case. The knowledge generated by a sole instructor is by far lesson than the knowledge generated by an entire classroom.

The engine that drives a case method classroom is teachers employing the Socratic Method (Garvin, 2003). The Socratic Method involves teachers employing an interrogative style by asking questions about the facts of the case, points at issues, judicial reasoning, underlying principles, and comparison with other cases (Garvin, 2003, p. 3). As an instructor, asking questions generates knowledge beyond the facts and intentions of a case. Although certain key principles are emphasized, students create knowledge beyond the case objectives. In traditional classrooms, knowledge is dispensed, not created.

Utilization of the Socratic Method extends learning beyond basic knowledge and begins a process of further research and analysis (Coffey, n.d.). Students are not passive recipients of knowledge. Learning extends beyond basic concepts requiring students to examine their beliefs, logic, knowledge and attitudes (Coffey, n.d.). Rather, students engage in an open-minded dialog with each other. The open-minded dialog creates new knowledge that normally does not occur in a traditional classroom. Although difficult to measure, the knowledge created is far more valuable than learning basic fact and figures.

Sanford (2003) provided valuable insight on the true nature of the Socratic Method. The goal of the Socratic Method is the development of student’s moral education (Sanford, 2003). The Socratic teacher’s questions are not to convince a student to believe a certain way or remember certain facts. Rather, the questions probe each student’s core beliefs or values. Students not only learn about their personal beliefs and values, but they see how the values compare to other students in the classroom. Knowledge is created in two ways. First, the students learn about their core values and beliefs. Second, students learn about other student’s values and beliefs. Either way, students learn which values and beliefs are their true moral compass.

The Socratic Method also requires students to engage in higher order thinking skills and summarizes how to recognize higher order thinking (Lam, 2011):

* Non-algorithmic
* Complex, complete path not visible from any vantage point
* Yields multiple solutions
* Involves nuanced judgment and interpretation
* Involves application of multiple criteria
* Often involves uncertainty
* Involves self-regulation of thinking process
* Involves finding meaning and developing structure in a chaotic environment
* Requires effort by participants

By utilizing the Socratic Method, case method teachers touch on many of the indictors of higher order thinking. Because higher order thinking is occurring, knowledge is continually created in a case method classroom. Students move beyond learning basic knowledge and concepts of a given subject. Instead, students synthesize, enact judgment, and find meaning in complex situations involving multiple and various constituencies.

Knowledge is also generated in a case method classroom by the linking of previous cases or lessons to the case under discussion (Andersen & Schiano, 2014). When students make connections between similar events, the result is students gain knowledge. The knowledge is not limited to one student. Rather, students in a case method classroom learn collectively. Students share their knowledge, skills, abilities, and experience with the rest of the class. Because the class works collaboratively to confront a problem or issue, the knowledge that is gained is well beyond that of a lecture

A component of case method classrooms that is often overlooked is the diversity in the classroom. Diversity includes the traditional definition of race, ethnicity, nationality and gender. However, in a case method classroom, diversity extends beyond the traditional definition. Diversity in a case method classroom includes diversity of thought, occupations, culture, ideas, and different areas of the U.S. Students not only learn through the cases, but they learn from their classmate’s diverse backgrounds. During the process, knowledge is created by hearing other students’ perspectives, ideas, thoughts, and cultural perspectives. Once a student leaves the classroom, they have a better understanding how their decisions impact others. Additionally, students realize their ideas and perspectives are not the only ones to consider. There is a multitude of ways to approach and solve organizational problems.

The exposure to traditional diversity categories also creates knowledge in the classroom. By engaging with classmates of different gender, culture, ethnicity, and race, students are learning about our global society. The case method provides a unique opportunity for students to become immersed in another culture. Not only do student see students of various cultures, but they gain first hand insight into their decision making, thought processes, and problem solving utilized by various cultures. In a traditional classroom, students will only see the outward differences that exist between cultures. A case method classroom enriches the experiences of all students beyond the course material.

A unique aspect of case method teaching is the complete lack of closure that most case studies provide (Garvin, 2009, p. 3). Good cases don’t have one correct answer. Often, there are many potential solutions. The purpose of a case studies classroom is helping future business men and women to be able to function in a world of uncertainty (Garvin, 2009, p. 5). Students often will leave a class puzzled, often creating more questions than answers. Anytime questions are being generated by students, knowledge is being created. The driving engine for knowledge creation is questions. Therefore, a case methods classroom is a perfect vehicle for creating knowledge through the continuous questioning and answering process.

A popular teaching method in recent years is the utilization of the flipped classroom. Flipped classroom require students to view the lesson as homework and utilize the class time to work on homework type activities. The theory behind the flipped classroom is that students typically struggle with the homework, not the in-class lesson. According to Andersen and Schiano (2014), utilizing a flipped classroom with the case method provides a unique learning environment. Students learn the lesson by reading or watching a video case and then practice their craft in class. Students get immediate feedback on their ideas from a class full of others studying the same material. Knowledge is constantly be created, challenged, and reframed.

Finally, business schools that commit to utilizing cases exclusively create a larger classroom known as a learning community. The goal of a learning community is to advance the collective knowledge in that way to support the growth of individual knowledge (Scardamalia & Bereiter, 1994). Even when students are not in the official classroom, knowledge is being created. When class is not in session, students are meeting in small learning groups discussing their ideas about the cases. Each time a learning group meets, they are creating their mini-classroom environment. The mini-classrooms have the same impact of the larger classroom in regards to knowledge creation, just on a smaller scale.

**Conclusions and Suggestions**

The case method classroom can be an instrument to create knowledge in the classroom. Utilizing the case method can be advantageous. The case method engages learners beyond basic knowledge. The case method also is a partnership between the teacher and students requiring alliances between both parties. From a teacher’s perspective, the case method requires them to master both content and process of learning. Mimicking the real world, cases are ambiguous which allows for multiple solutions to cases. In addition, the case method allows for the development of the critical skills of problem solving, analysis, decision making, and coping with ambiguity.

The case method also has many disadvantages. Some argue that cases are artificial, unrealistic, and can never mimic the real world complexities of the business world. Additionally, the success of the case method depends primarily on the quality of the teacher. The case method transfers the classroom power from the teacher to the students making teachers vulnerable to various criticisms. The case method is also time-consuming requiring both the teacher and students to commit many hours of preparation prior entering the classroom.

With the various advantages and disadvantages, the case method provides a means to create knowledge in the classroom. Case method teaching is an active process in which students bring their respective experience to the classroom and contribute to knowledge creation. Additionally, the use of the Socratic Method causes students to think deeply about issues and allows the application of previous case lessons to new situations. Because cases are open-ended, students continuously seek answers to questions thus creating more knowledge. Moreover, the wide range of diversity within the classroom creates knowledge by understanding the different perspectives of various classroom participants. Finally, classroom learning and knowledge development are extended by the use of learning groups and learning communities.

Although knowledge is created in a case method classroom, very little of the knowledge is captured for future learning endeavors. Students may take away knowledge, but the case method lacks a system for capturing knowledge for others to utilize. A recommendation for further research is to develop a system to capture case method classroom knowledge, record the knowledge gained, and publish the results for others to utilize.

Another possible vein of research involves the effectiveness of case method teaching. Although the case method has been used extensively at business schools, very little evidence exists on its effectiveness. Much of the effectiveness is based upon anecdotal data on whether students or faculty members feel students learned. Others argue the effectiveness of the case method lies in the success of the graduates of programs such as Harvard which employs the case method extensively. However, empirical evidence does not exist to prove this assertion.

Finally, little training exists to help faculty develop their case method teaching skills. With the except of Harvard Business School Publishing or the Richard Ivey Business School, few institutions provide faculty the opportunity to learn the complex skills set necessary to orchestrate a case. An opportunity exists to create training for case method teaching. Additionally, as the case method seminars progress, data can be collected to improve both the training of faculty members as well as the practice of case method teaching.

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