

H A R V A R D | B U S I N E S S | S C H O O L



Development and Use of “Teaching Cases”

Mary Shelman, Brent Ross, Jose Boccherini

IFAMA Case Workshop

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HBS mission:

Educating leaders who make a difference in the world

- **MBA program**
 - Two year full-time program
 - 900 students in each year
 - General management focus
- **Doctoral program**
 - DBA w/ ~20 new students/yr
 - Joint degree programs w/ Harvard University
- **Executive Education**
 - General management, focused programs, custom programs
 - 45+ programs, ~200 program weeks/yr
- **Harvard Business School Press (HBSP)**
 - Harvard Business Review
 - Books
 - Cases (~11 million HBS cases sold annually)

Agribusiness at HBS

- **Ray Goldberg's leadership and legacy**
 - Agriculture and Business program with John Davis in the 1950s
 - Davis and Goldberg, *A Concept of Agribusiness*, 1957
 - Commodity system approach
- **Annual Agribusiness Seminar in Boston**
 - 50+ year old “focused” program
 - 3.5 day case-based, intensive residence course
 - 200+ participants, 40+ countries, many repeats, extensive waitlist
 - Mix of participants by industry, company size, geography
 - 11-12 new agribusiness cases written every year
- **Agribusiness “Offsite” Seminar**
 - Targeted at first time participants
 - Paris, Buenos Aires, Sao Paulo, Shanghai, Mumbai, London
- **Agribusiness MBA course (when offered)**
 - 2nd year MBA elective
 - 15 or 30 session case-based course
 - 60-80 students

HBS Agribusiness Cases 2008-2012

Nestlé (Switzerland)
Olam International (Singapore)
GlobalGAP (Germany)
Taylor Farms (USA)
JBS (Brazil)
COFCO Xinjiang Tunhe (China)
Arcadia Biosciences (USA)
Syngenta (Switzerland)
ViniBrasil (Brazil)
Marks & Spencer (UK)
AGRA (Kenya)
Kepak (Ireland)
Zespri (New Zealand)
Yum! (China)
Los Grobo (Argentina)
Associated British Foods (UK)
Domino's (USA)
Marine Harvest (Norway)
Brasil Foods (Brazil)
Exima (Russia)

Monsanto (USA)
Rabobank (Netherlands)
Ebro Puleva (Spain)
DaChan (China)
Diamond Foods (USA)
Hungerit (Hungary)
Cosan (Brazil)
PureCircle (Malaysia)
Woolf Farming (USA)
Codevasf (Brazil)
Red Tomato (USA)
FreshTec (USA)
Asian Agri (Indonesia)
CME Group (USA)
CHS (USA)
Jain Irrigation (India)
K&N's Poultry (Pakistan)
Fonterra (New Zealand)
Mutti (Italy)
OSI (China)

Cases are the cornerstone

- **Over 80% of MBA content**
 - Used in all classes
 - Supplemented w/ lectures, simulations, fieldwork, etc
 - ~500 cases in two years
 - Class participation 50%-80% of course grade
- **Field cases as research approach**
 - Examine the “outliers”
 - Find the first movers
 - Identify trends
 - Explore innovative approaches, business structures
 - Synthesize findings to develop theory and frameworks

What is an HBS-style case?

- Written for teaching (to stimulate classroom discussion)
- Detailed account of a real life business situation
- Describes the dilemma of a protagonist who is confronted with a significant (but sometimes not obvious) ISSUE
- Complete with NOISE (extraneous, incomplete, and sometimes conflicting information) and UNSTATED information that must be inferred
- Often presented in a non-linear structure
- Contains no stated conclusions
- 9-12 pages text, 5-10 supporting exhibits

Why use cases?

- **“Participant-centered learning”**
 - Students actively engage in practical business situations
 - Inductive reasoning
 - Learn from each other
 - Develop critical thinking skills

The case in the HBS classroom

- **80-minutes class session**
 - Traditional 'cold call' to begin ("Ms. Nielsen, would you get us started today?")
 - Opener lays out context AND commits to a decision
 - Implications emerge through discussion and debate
 - Faculty wrap-up: short, NO answer, generalizations, perhaps an update
 - Possible visit by case protagonist / other guest
- **Faculty as 'choreographer'**
 - Primarily asks questions: What would you do? Why would you do that?
 - Push students to take a stand
 - Strive for student-to-student debate
 - CLASSROOM only thing under faculty control
 - Moving in and out of discussion arena
 - Boards used to provide structure



The case in the HBS classroom – cont.

- **Student preparation**

- Prepare the night before
- Average 2 hrs/case
- Case information as basis for analysis (outside research not required)
- Case questions as guide (but often ignored)
- Take protagonist point of view (rather than consultant)
- Specific recommendations about the main decision point (hypothesis, proof, action, alternatives)
- No written submissions
- Study group to reinforce, deepen analysis

- **Faculty preparation**

- 3-4 hrs case preparation
- 1-2+ hrs process preparation
 - “Discussion Pastures” (themes)
 - How they relate
 - Flow
 - Possible questions to encourage greater depth and focus
 - Teaching Note for suggestions

The case in the classroom

- ❑ **Get beyond case facts**
- ❑ **Students present ideas, analyses, personal experiences**
- ❑ **Build on comments and critique and debate different points of view**

Preparing to teach a case

❑ Teaching Objectives

- ❑ Less is more
- ❑ Audience & skill level

❑ Compelling topics, points of tension and possible confusion

❑ The Teaching Plan

- ❑ Discussion Pastures
- ❑ Question List
 - ❑ Opening question
 - ❑ Transition questions
 - ❑ Probes
- ❑ Board Plan
- ❑ Calling List
- ❑ The Close

Running a case discussion

❑ Beginning

- ❑ First words
- ❑ Energy and tone
- ❑ Props?

❑ During

- ❑ Questioning, listening, responding
- ❑ Pacing & transitions
- ❑ Pushing for different points of view / disagreement
- ❑ Planned vs. flexible
- ❑ Participation:
 - ❑ Goal -- student-to-student
 - ❑ Depth v. breadth
 - ❑ Quantity v. quality
 - ❑ Off topic comments

❑ Afterwards

- ❑ Record comments
- ❑ Reflection and refining

Student Performance

- **Hardest part is remembering who participated**
 - Assigned seats
 - Printed seating plan
 - Fast exit
 - Recreate discussion
 - Course “scribe”
- **How much did this comment move the discussion forward?**
 - + or nothing
- **Cumulative over course**

Ensuring Success

- **Preparation**
 - Faculty “model” of desired preparation level
 - Reasonable expectations
 - Setting boundaries
- **Participation**
 - Case selection
 - Dynamic classroom
 - Improves with experience
 - Faculty initially more directive but then stands back
 - Have a “Plan B”
 - Faculty willing to cede control (not just Q&A session)
 - Grade as motivator for advance preparation
- **Respect**
 - Faculty model behavior
 - No wrong answers
 - Be very careful with humor

HBS case development

- **350 new cases every year**
 - About 15% of the curriculum
- **Predominantly field cases**
 - < 15% 'library' or general experience cases
 - Direct company involvement, including company 'release' before publication
 - Funded out of HBS research budget
- **Cases written by**
 - HBS faculty first author
 - Professional research assistants (not students)
 - Global Research Group ("pooled" group of experienced case writers)
 - Field research offices (Europe, Latin America, Japan, India, China)

Characteristics of a good teaching case

- ❑ Has a decision-maker that students can relate to
- ❑ Distinct decision point
 - Specific options may be included
- ❑ Room for analysis
- ❑ No simple solution
- ❑ Engenders debate
- ❑ May be historic or current, although current attracts more interest

The case writing process

1. Objectives of the case

- New course, interesting topic, refresh dated material
- Same case used for multiple teaching objectives

2. Company selection

- Proactive vs reactive
- Willingness to participate, share information
- Other criteria (geography, size, industry, ownership, etc)
- Confidentiality

The case writing process – cont.

3. Background research

- Basic knowledge of industry
- Some idea of key issues

4. Site visit

- Usually 1-3 days, faculty and/or RA
- Multiple interviews and data collection (financial, market share, etc)
 - Good listening skills
 - Extensive notes, audio tapes, video
 - General observations (culture, management style)
- Identify protagonist AND key decision ('the HOOK')

The case writing process – cont.

5. Telling the story

- The intro/setup
- Case structure evolves
 - Technical details
 - Industry information
 - Competitor information
- Follow-up interviews w/ company, customers, competitors, etc
- Additional data collection and analysis
- Exhibits created
 - Data sometimes disguised (e.g., indexed, graph)
- Drafts – what's missing
- First and last sections are KEY
- Strict HBS case conventions
 - Detailed style guide
 - Always written in past tense
- It takes longer to write a short case than a long case!
 - WHAT TO PUT IN, WHAT TO TAKE OUT

The case writing process – cont.

6. Revisions and approvals

- Individual quotes w/ in and outside company
- Company sign-off
 - Disguised cases
- Copyright permissions

7. Teaching notes

- Written after first teaching

9. Revisions based on actual teaching

- Clarify facts
- Enhance key issues
- Remove red herrings

Case writing and teaching resources

Harvard Business School Christensen Center for Teaching and Learning

www.hbs.edu/teaching

- **Developing a Teaching Case (900-001)**
- **Case Method Teaching (581-058)**
- **Hints for Case Teaching (585-012)**
- **Choreographing a Case Class (595-074)**
- **Learning by the Case Method (376-241)**
- **Because Wisdom Can't Be Told (451-005)**
- **The Use of Cases in Management Education (376-240)**

Harvard Business School Publishing, www.hbsp.harvard.edu