

Teaching With Cases

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Cases are a way of bringing a controlled reality into the teaching-learning situation.

There are four basic uses of cases:

1. Example - observe what was done.
2. Analysis - describe what was done in terms of some conceptual framework.
3. Application - use some conceptual framework to decide what to do next.
4. Evaluation - use some conceptual framework (or set of criteria) to evaluate what was done.

Teaching with cases must be done within some framework -

- developed prior to case discussion
- developed during case discussion

Written Assignments

- informal
- short formal
- long formal

Group Discussion

- in class
- out of class

Choosing good cases

- face validity
- related to teaching objective
- readable
- maximize learning opportunities: Use case to expose students to material not normally covered in class.

Class Discussion

- use of board to record ideas
- don't just depend on volunteers
- stick with reluctant student
- listen carefully
- clarify rather than correct

- use voting to get expressions of opinions and to identify differences
- encourage dialogue among students
- use summary at end to pull together, develop focus, add information

Pitfalls

- Not enough information - students do not want to deal with uncertainty.
- Right answer - particularly if the students turn in an assignment and are graded.
- Too much time on one point or with one student.
- Never getting to point/issue that teacher thinks is critical.

Reference:

Towl, Andrew R. *To Study Administration by Cases*. Harvard University, Graduate School of Business Administration, Boston, 1969.

Case Assignments:

1. Write a one page analysis of the case including the following three sections.
 - a. Identify a critical organizational problem.
 - b. Recommend a solution.
 - c. Justify your solution in terms of the theoretical material included in the class lectures and reading materials.
2. Suggestions:
 - a. There are many problems in the case. You only need to select one.
 - b. Skim the case quickly to get the general thrust of the situation. Then read the case carefully, from the perspective of this course.
 - c. Do not take everything in the case at face value. For example, just because the manager says communications is a problem does not mean that it is.

- d. Use the material taught in this course to support your analysis and recommended solutions.
- e. Assume that the instructor has read the case. Do not spend valuable time repeating case material.
- f. Be as specific as possible. To say simply that the company needs to be reorganized is not useful.

Case Instructions

The purpose of the case analysis is to integrate all you have learned about the systems perspective of organizational theory and to apply this knowledge and understanding to a practical situation. Your written and oral analysis should reflect your ability to examine an organizational situation and correctly and comprehensively apply systems theory to that situation.

The assignment is larger than merely writing up an analysis. Significant class discussion is expected from each student when case write-ups are due. The following instructions are meant as a catalyst to your thinking about the case. Although it might appear there are three separate assignments (reading, writing, discussing the case), it is intended that all three blend into a single effort.

1. How to read the case:

Do not read the case simply to learn the facts of the situation. Read with the purpose of using or applying the facts to arrive at a decision and to think through an action procedure. In arriving at a decision be sure to define the problems the company faces and propose alternative solution strategies. Thus, you must study the case, realizing that you must solve problems and make decisions.

2. How to write the case:

Remember that case facts are to serve as a catalyst and are essential to the process of case analysis. They are not the purpose of the case analysis. There will, of course, be missing facts. Be aware of two types of missing information:

- 1) Some facts will remain unknown until the passage of time; that is, they are future dependent. It is unrealistic to expect this type of information; these uncertainties are an important element of the decision-making process.

- 2) Some additional facts are obtainable with the investment of time and resources. Consider the usefulness of acquiring additional information. Look at the benefits and the costs (don't forget lost opportunities) of developing the new information and decide whether or not to acquire more facts.

- State the problem(s) the company faces.
- Enumerate alternative courses of action.
- State what you would do in this particular situation. Assume an administrative point of view, and present the relevance of systems theory for action.

3. How to prepare to discuss the case:

The discussion should be seen as an opportunity to test ideas under uncertainty. The varied reactions of the class to an idea is not unlike the situation faced by the decision maker upon announcing a selected course of action.

Mentally prepare responses to the following action questions:

- 1) What did X do? -- Descriptive

Try to have a clear view of what was said and done. This is perhaps distinctly different from what you would have done in the same situation.

- 2) What might X have done? -- Possibilities

Do not confuse this with question #3 which is concerned with the future. The question posed now is to develop alternative courses of action for X in the given situation as posed in the case. Here again you are after descriptions of possibilities and not necessarily an evaluation of the alternatives. In developing your alternatives consider what is practical, what is feasible, and what is ideal. Keep your alternatives tied to reality, that is avoid speculation unrelated to the real. Use the material learned in this course to help you generate alternatives. Be prepared to defend alternatives in light of systems theory.

- 3) What will X do now? -- Predictive

Do not expect to find a pattern of causality in the case. Guess what will happen, but do not blindly guess. Use what information you have and your own intuitive skills to answer this

question. Be prepared to say why you think X will do to Y.

- 5) What should have been done? -- Normative

Do not confuse this question with what you would have done. If the world were a perfect place and management and organizational principles were perfectly applied, what SHOULD be done in this situation?

Group Case Discussions

Guidelines for Handling Cases

- 1) What are the facts that are critical to understanding this case?
- 2) What are the basic concepts which seem to apply?
- 3) Of these concepts, which one or two seem most critical?
- 4) What are the key words associated with these concepts?
- 5) A. Problem Statement
B. Solution Statement
C. Justification Statement

Procedure

Ask the group to name #1. Try to make sure they are facts and critical.

Then ask group to name #2. Write these on the board.

Then vote for #3. It may be necessary to keep one up that is particularly critical but normally let the vote stand.

Then ask for key words for each of the critical concepts. List these words on the board. It gives one a chance to correct misunderstandings and to elaborate on the concepts.

Then use what the group has done to generate #5. Do this or otherwise there is a problem of "approval" or "mine right."

After putting an idea or two on the table, let the group add on.

Some Cases to Analyze

INCIDENT 33

Watson Siding

Bob Jackson picked up the phone. "Yes?"

"Mr. Jackson there's been a derailment at Watson Siding. The ten o'clock freight hit a split switch and jumped the track. It skidded over to the second main line and the whole railroad's blocked!"

"Who is this?"

"I'm Baxter the Yardmaster at Daggett."

"Baxter you know that Watson Siding is in the Westport subdivision. The responsibility for the wreck belongs to Atkins at Westport. I handle only the road up to Juniper-and that's four miles this side of Watson Siding."

"Yes sir, but the wrecking crane for the Westport subdivision is tied up in the shops. Yours is out at Juniper and it would only take a few minutes to run it down and clear the main line."

"Baxter have you ever read the delegations of authorities to subdivision superintendents? It says very clearly that they will not under any circumstances move their assigned equipment to another subdivision without written authorization from the division superintendent."

"But sir Mr. Bagley is out of town!"

"Well, wait 'til he gets back in town! If you think I'm going to lose my job just because someone made a mistake in the Watson subdivision you're crazy."

Baxter drew a deep breath. "Mr. Jackson, we have the whole railroad tied up. You have at least two trains waiting now for clearance because of the wreck. We have our crack passenger train tied up at Watson Siding now, and all the passengers are having a good look at a bunch of boxcars scattered all over the right of way. I'm sure that many of them ship by our railroad. Can you please send over your wrecking crane for a few minutes, so we can clear one track at least?"

"Confound it, Baxter, no!" Bob slammed down the phone. He remembered once in 1937, when he tried to help those people over in the Westport subdivision. He had sent them a wheel car and as a result, he had been suspended for a month. This time, he was not about to get into trouble. He sighed. The trouble with these young kids trying to run the show these days was that they just didn't realize how important it was to maintain proper channels.

He picked up the phone. "Jim, check on how many trains we'll delay if the line stays closed for a couple of days. It looks like we'll be sitting here for some time. Those Westport subdivision people are not very efficient."

questions

- 1 Would more precise definitions of authority limitations have prevented this blocking of the entire railroad?
- 2 Should the authority structure be altered in an emergency?
- 3 How would you define an emergency?
- 4 Evaluate Jackson's behavior. What else might he have done?
- 5 What solutions are left for Baxter?
- 6 Why does Jackson think Westport inefficient?



INCIDENT 98

Metropolitan Junior Businessman and Professional Association

The Metropolitan Junior Businessman and Professional Association of a major Western city is a social organization that also engages in various civic activities. Its members consist of young—under 35—executives, businessmen, accountants, and lawyers.

Professor Robert Smith of State University was contacted by Dick Blake, the Chairman of the International Affairs Committee, to be a guest speaker at a luncheon to be attended by committee members. The Association has a number of special-interest committees, whose members attend monthly luncheons at which guest speakers appear. They pay a few dollars, in addition to their general annual membership dues, to attend each luncheon.

Professor Smith's personal policy is to speak without charge at all extracurricular-university student and faculty functions and, on occasion, for external organizations where charity affairs are involved. Because of the great demands placed on his time by the many local organizations asking him to be a guest speaker, he usually charges a \$100 fee when he accepts an invitation of this type. He explained his position to Dick Blake, who readily agreed to pay him his \$100 fee, promising to give him a check at the luncheon.

Professor Smith's talk was very well received; however, several weeks later he had still not been paid, nor had he received any note of thanks from the Association for his talk. He tried to contact Dick Blake, leaving several messages for him, but his calls were never returned. A few weeks more passed and Professor Smith called one of his former students, John Grant, who was a member of the committee he had addressed. John told him that there were some problems with regard to paying his fee and advised him to contact Al Walters, Executive Secretary of the Association, who was the permanent operating Chief Executive.

Professor Smith's secretary called Mr. Walters, who said that a check would be issued in the next few days. After a few more weeks, the check had not arrived and Professor Smith called Al Walters and was told that he was not there. Mr. Walters did not return Smith's call. About a week later, Professor Smith called John Grant again. John said that he felt obliged to explain the real situation to him and he proceeded to do so, revealing the following information.

Dick Blake, as elected Chairman of the International Affairs Committee, had no authority to pay Professor Smith a fee for his talk. In fact, it was the general policy of the Metropolitan Association not to pay guest speakers. Blake apparently hoped to pay Professor Smith in the future by charging committee members a few extra dollars at a number of forthcoming luncheons. At this time, the whole matter of payment was to be discussed by the Board of Directors of the Association.

After this conversation, John Grant called Al Walters and then called Professor Smith. He told Smith that Walters was sending him a letter that would explain the whole situation in detail. The next day, Smith received the letter, which he found most distressing. Al Walters wrote that he was sorry that Professor Smith and his staff had had to call the Association so many times for his \$100 fee. Smith interpreted this statement as being sarcastic. The letter went on to point out that a senator, a state governor, an admiral, and an astronaut had all addressed various committees of the Association without charge and that Smith's case—because it was unique and not in line with the Association's policy—would take some time to be ruled upon by the Board of Directors. In general, Professor Smith thought that the letter was sarcastic, undignified, and nasty.

Smith then wrote a strong letter indicating his displeasure to Al Walters. In this letter, he stated that he felt that Walters' letter was sarcastic, nasty, and generally in poor taste. He went on to say that Walters was clearly trying to make him feel guilty for charging a \$100 fee and that he was being held responsible and blamed for errors and inefficiencies committed by members of the Metropolitan Association. Smith sent a copy of this letter, along with Walters' letter to him and a covering letter that reiterated some of the points made in his letter to Walters, to Ralph James, President of the Metropolitan Junior Businessman and Professional Association. In his brief covering letter to James, he strongly criticized Walters. Ralph James' position as President of the organization, although essentially honorary, is

officially that of Al Walters' superior.

A few days later, Professor Smith received a very strong letter from Ralph James. James stated that he was surprised that a faculty member would write such an emotional and inappropriate letter to the Metropolitan Association. He also indicated that this letter could strain the good relations that existed between State University and his Association. James also stated that a copy of his letter and excerpts of Smith's letter to Al Walters were being sent to Dr. Alfred Long, Smith's Dean at State University.

questions

- 1 What are the major issues in this incident?
- 2 Who is wrong and who is right?
- 3 What managerial functions are involved and in what ways?
- 4 What action should the Metropolitan Junior Businessman and Professional Association take at this time?
- 5 What action should Professor Smith take?
- 6 What should Dean Long do?