

# Techniques And Strategies For Use Of Case Studies In Marketing Management And Strategic Marketing Management Courses

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## ABSTRACT

*Marketing case studies provide context for analysis and decision-making designs in different business situations, companies, and industries. In most marketing courses, students use cases about actual companies to practice strategic marketing analysis and to gain some experience in the tasks of crafting and implementing marketing strategy. A case sets forth, in factual manner, the events and organizational circumstances surrounding a particular marketing managerial situation. The purpose of this paper is to look at why case studies are used, problems using them and recommendations using standard and innovative methodologies for using them effectively.*

## THE NEED FOR CASES IN MARKETING MANAGEMENT AND STRATEGIC MARKETING COURSES

Teaching and learning about marketing, businesses and the environment in which they operate is contained within a business curriculum but context and events in which business operate are constantly changing. The case method is an effective avenue for sensitizing students and faculty to the complexities and structures of business organizations.

The case method is an effective avenue for sensitizing students and faculty to the complexities and structures of marketing organizations. Cases are not intended as examples of either weak or exceptionally good marketing practices. Nor do they provide examples of particular concepts. Marketing faculty that use case analysis methods are up-dated as to current techniques, successes and failures of business allowing them to stay current.

Marketing cases are one of the most effective and convenient ways to introduce practice into the classroom, to tap a wide variety of experiences, and involve students actively in analysis and decision-making. Cases are not intended as examples of either weak or exceptionally good management practices. Nor do they provide examples of particular concepts.

There are many positives to case study analysis. Marketing faculties who utilize case analysis methods stay current as to current techniques, successes and failures of business.

The case approach to strategic analysis is, first and foremost, an exercise in learning by doing. Cases help substitute for on-the-job experience by (1) giving broader student exposure to a variety of industries, organizations, and strategic problems; (2) forcing student to assume a managerial role (as opposed to that of just an onlooker); (3) providing a test of how to apply the tools and techniques of strategic management; and (4) asking student to come up with pragmatic managerial action plans to deal with the issues at hand.

Cases also provide an opportunity for student to enhance their business decision making skills, accommodate alternative points of view and reinforce business content.

## ISSUES USING CASE STUDIES IN BUSINESS COURSES

In responding to this context one solution is to construct and use case-studies, but there are some issues to the use of case studies. They can be time-consuming, expensive to produce, need constant up-dating, and may not be proper for some classes.

Marketing studies gains much of its appeal because of its perceived relevance to the modern world. Teaching and learning about marketing to business firms and the environment in which they operate is contained within a curriculum but the context and events in which they operate are constantly changing. The inter-related and dynamic nature of this environment means that firms have to constantly analyze this environment and adjust strategies to take account of changing events.

Educational publishers produce mainstream text resources, such as books, for classroom use in schools and colleges throughout the world. These core resources provide traditional and necessary resources for students. However, in a modern and active learning environment that is constantly changing, even though these texts will contain case studies, both instructors and students want more than dated material from textbooks to bring subjects to life. Information within case studies in textbooks is often second hand and adapted from articles in marketing and business magazines. Cases tend to be short, limited and have been repurposed for educational use, with a subsequent loss of usefulness.

Students are more likely to transfer knowledge if they can link their learning to current relevant issues. In particular, in the field of business, where the world is ever changing, instructors look for resources to reflect all of the events within the external business environment that complement lessons learned from textbooks. The behavior of and decisions made by managers of all different types of firms provide a basis for students to understand how course material is mirrored within a business environment. However this implies using a curriculum based on material that, unlike most mainstream texts, draws on active management practices and environmental demands.

Most case study material concerning the actions, strategies, financial perspectives, and behaviors of firms are not readily available. Even with the advent of the Internet and easy access to information, the material and information is available is of little or no value, as it is aimed at potential investors and/or for educational purposes.

In the marketing curriculum many details of functional areas with a firm are missing or excluded from case studies. Many courses in functional areas are based on human resource management, production and operations management, management information systems, marketing strategy, which many business cases lack information and detail on. Much of this required information may be significant to the student's analysis of the case which lacks important information that may be relevant to the student's overall analysis of the case which is lacking.

Other issues of concern are that case studies are very time consuming in the data collection and analysis stages (Becker 1998; Bryman and Burgess 1994; Denzin and Lincoln 1994; Schratz, W. and Walker 1995).

Marketing case studies must be effective as it relates to the business curriculum is called theory-seeking and theory-testing (Adelman et al., 1980; Bassey 1999). Some marketing cases are actually developed by researchers who have no education or experience in business.

Businesses pay to contribute - and distribute - the case-studies which must conform to requirements which ensure classroom materials are relevant, rigorous, up-to-date, and unbiased: cross-referenced to the curriculum; both practical- and theoretical; designed to enrich classroom experiences; ethically-based, taking into account the advice of teachers.

Teaching and learning about business firms and the environment in which they operate is contained within a curriculum and the context in which firms operate is constantly changing. A solution is to use case studies because case studies are an excellent way of showing how business skills must be applied with a particular context. Business and marketing organizations should pay to contribute and distribute the case studies. The researcher ensures that they

conform to requirements that classroom materials are: relevant, rigorous, up-to-date, and unbiased; cross-referenced to the curriculum; both practical and theoretical; designed to enrich classroom experiences; ethically based; and take into account the advice of teachers.

Lawyers and physicians use the case method to identify precedents and cases have been used to represent groups of similar events or symptoms. Future practice has been informed by past history and the case method has become so authoritative, that training within these professions has become heavily based on the case method.

Since then there has been some progress towards identifying the factors which define a case study. There is widespread agreement that a case study is of 'real life', is holistic and it enables the investigation of the relationships between the component parts of the case. In his classic book on case study, Yin (1994) points out that a case study is an empirical inquiry that allows investigation into a contemporary phenomenon within its real-life context. The case study answers why and how question (Robson 1993). Human systems develop an integrity about and investigation of patterns that emerge from interdependencies (Sturman 1994) and (Stake 1995).

### **CASE STUDIES SHOULD BE PRODUCED ECONOMICALLY**

Each firm that has case study being developed about the organization should pay some portion of an economic fee for the process. This would provide an incentive to the participative firm to that the case study of their firm would provide attractive and up-to-date materials that both students and instructors would value. At the heart of the process was the need to keep the project heavily educationally-focused and theoretically-based in order to show students that work within the classroom had relevance in the business world. The case studies should needed information, data and metaphors that would help to improve classroom practice and empower students to develop higher levels of response within assessments. In order to do this each case has to be interesting, current, and rigorous. Cases should include a variety and range of information concerning things such as new promotions, improved targeting and segmentation and analyzed the affect of a number of strategies such as the launch of new products and their position in the product life cycle.

### **CASE STUDIES SHOULD BE CHALLENGING AND UNBIASED**

Before the study is performed, the case study researcher and the sponsoring firm should totally agree on the curriculum needs and requirements. Data collection usually depends upon the sponsor of the study. Although some studies have been written on the basis of personal interviews, others have been developed after access had been gained to what had before been confidential data. It should be agreed by the researcher and sponsoring firm that the case study will be ethically based. The purpose of this is to ensure that sponsoring firms do not present their promotional materials for the sake of sales or increased market share.

### **CASE STUDIES SHOULD BE CURRENT**

Case study researchers need to develop an assessment or mechanism for analyzing and responding to feedback from the educational community concerning the case study. Evaluation involved feedback from questionnaire analysis and focus group activity with both students and instructors could be invaluable. Case studies are generally used in business classrooms, not just as reference information, but also to develop a much deeper understanding of business issues through the process of case analysis. They also actively develop student's analytical skills, by learning to organize, assess, classify and evaluate data presented in the case studies. Case studies also develop student's theoretical knowledge increasing their ability to transfer concepts.

### **CASE STUDY COLLATERAL**

Today there are more instructors' resources and collateral than ever before. Some of these assets include the following:

- Information packets on improved delivery performance;
- Curriculum matrix cross-references of cases;
- Instructor’s Manuals;
- Instructor and Student Supplements;
- CD-ROM and web sites that students and instructors can access 24 hours a day, 360 days a year with real-time updates to the cases and firms be studied and analyzed;

### **CASE STUDIES SHOULD BE RELEVANT TO THE COURSE AND CURRICULUM**

Case studies should be cross-referenced to the curriculum and be both practical and theoretical. The case study should consider how the actions of the participating firm could be interpreted and synthesized in such a way that students can develop insight into the world of business. In most cases firms respond positively to advice upon the educational value of their firms study. Better-focused studies tend to be those that are more widely used. One of the problems is that they also want their study to be as interesting and informative as contributions from other organizations.

Case studies should enrich classroom experiences. The starting point for every case study should be the curriculum. Studies also have to be ethically based, taking into account the advice of instructors, departments, and the college.

The process of using case studies to draw out learning outcomes was relatively new for many instructors of business programs, particularly those from accounting and skills backgrounds. Case analysis in business has provided a vehicle for students to examine current issues using both objective and analytical skills as well as develop both creative and co-operative approaches within the classroom. Realism has become a powerful tool in this learning process, enabling students to link tasks similar to those that they may be asked to require to undertake in a workplace. The use of case analysis also provides young people with the theoretical knowledge and skills required to become ‘creative problem solvers’ that employers find so valuable.

### **SUGGESTIONS FOR UTILIZING MARKETING CASES**

There are many ways to use cases. Some instructors prefer to generate open class discussion. Others prefer to assign cases to student teams for oral presentations. Most like to have students write an analysis of at least one case during the course, often as a final examination.

### **OPEN CLASS CASE DISCUSSION**

One case approach used is for the instructor to lead the discussion with penetrating questions and answers. The many prefer to begin the analysis with a few key questions and hope to get the students to take over the discussion. The instructor then tends to fade into the background or puts key points on the blackboard or dry erase board. This approach may work very well for graduate students but fails miserably with undergraduate students. As shown in Exhibit 1, the “typical” undergraduate strategy class needs much more pushing and prodding by the instructor to keep discussion moving than do most graduate classes. Some suggested steps to get open class case discussion going in either type of class are:

- Read the case over carefully before class. Then study the case. Calculate common size financial statements and adjust for inflation. Any obvious problem areas?
- Read the teachers notes for the case. Use the instructor’s manual! Read previous student papers if possible.
- Decide how you’re going to run the class. What key points need to be addressed? Can you break the class up into teams and have them role-play or analyze certain parts of the case and present them to the class? Prepare an outline if how you would like the discussion to go and guess how much time is needed per major point.
- Put together a usable seating chart. If the class meets for a long period of time, ask students to make their own name cards and to bring them to class each time. Take pieces of paper and magic markers for them to use at the first meeting (1 marker for each row in the class). Be prepared to keep track of discussion in pencil

on your seating chart. If you call on students, mark a check next to their names. If the answer is very good, put a + next to the check. If someone answers poor, place a minus next to the check. If someone volunteers, mark a straight line next to the name. If it's a great comment, make it a plus sign. You can do this either during class or immediately after (if you have the time). Then transfer your marks to a separate sheet with dated columns.

- Start with the basics. Call on someone to state the basic facts of the case. Ask him to her describe the firm. When was it founded? What does it make? How well is it doing? The first undergraduate will probably respond in terse sentences such as, "It makes electronic parts." Getting more information may require you to play dentist – pulling sentence fragments out like teeth. "What kind of electronic parts? Who buys them? How are they made? How are its sales? Is it profitable?" As the typical undergraduate begins to falter and skims wildly through the pages in the book, we hope you will hear from a volunteer. Keep rolling.
- Go through your outline section by section. Put the topic headings on the blackboard as they are discussed and write in key points under each. Remember to leave enough time to develop alternatives with pros and cons for each. Force the class to make a decision. Have them personally vote for their desired alternatives; then push them to justify these. Give yourself five minutes at the end of each class to sum up the discussion and to point out the key learning objectives of the case discussion. Above all, try not to carry a case over to the next class meeting. Students will typically have forgotten it completely by then and all momentum will be lost. If you have to carry it over, summarize the previous discussion and then ask students to write their solution on paper to hand in like a pop quiz. Everyone will want to justify their personal solution orally after they hand in their paper. You will probably have a hard time closing down the discussion!
- As a final note, you may wish to tell students what actually happened to the firm in the case (if you know). They enjoy hearing a postscript. Please remind them, however, that there is no one best solution. Encourage creativity. Above all, start writing some cases yourself. It will give you a lot more confidence as a case discussion leader.

## **STUDENT ORAL PRESENTATIONS**

A second approach to using cases is the student oral presentation. By the second or third day of class, the students are placed into teams, each composed of three to five people. Each team is assigned a case to present during the semester. This approach may be used during the second half of the semester instructor chooses to lead open discussion during the first half. It may also be used during the first half instead of open class case discussion if a simulation or project is planned for the second half of the course. Among its advantages are:

- The instructor gets off stage and is no longer responsible for case analysis.
- The students develop important presentation skills as well as learning how to handle
- Students are under pressure in a questioning period.
- The level of analysis is typically deeper than in the average open class case discussion, (unless the instructor is extremely competent in leading cases or the students are unusually motivated to prepare for the discussions).

Be sure and focus efforts of suggestions and recommendations to the first presenting team to set the stage for the rest of the presentation teams. If it is done well, the other presenting teams will most likely do well. If it goes poorly, the rest of the presenting teams will probably not do well either and be of low quality. The biggest disadvantage of the student oral presentation is that unless something else is assigned, most undergraduates and a large number of graduate students who are not presenting will only superficially read the case. They are likely to hold back from asking any penetrating questions of the presenting group and may choose to skip classes when they are not themselves presenting. It is recommended that the instructor assign at least some written analysis to a couple of non-presenting teams. The instructor should also give fairly comprehensive feedback to the presenting team within a week of the presentation. Another suggestion is to require all students to complete a form critiquing the oral presentation. Comments may compose a participation grade. Don't schedule all oral presentations back-to-back intermix them with lectures or open class discussions.

## **WRITTEN CASE ANALYSIS**

There are at least three approaches to use with written case analyses. One is the comprehensive student report that covers all the issues in the case in a complete manner including references and exhibits (ratios, pro forma's, product life cycle drawings, etc.) A second approach is the short report prepared in response to a specific question. A third approach is the strategic audit. It forces the student to do a complete strategic analysis as in the comprehensive report, but it is only a three- to five- page outline and is quick to read and easy to grade.

Both the short report and the strategic audit are useful during open class case discussion in order to ensure adequate student preparation for class. The instructor's job as discussion leader is made much easier as students complete with each other to orally "sell" their points of view in class. Good arguments can develop. The instructor may use the blackboard to list the pros and cons of each argument and ask for a student vote on the issues. The short report and the strategic audit are also useful adjuncts to student oral presentations. If two or three teams bring completed reports or audits to class on the same case being presented orally, much more interest is generated in class during the presentation.

## **GRADING OF WRITTEN COMPREHENSIVE CASE REPORTS**

The grading of a written comprehensive report is often aided by the use of a case evaluation form such as the one suggested for oral presentations. These forms help to ensure that the instructor considers all aspects of case analysis and provides the students with clear-cut comments on key aspects of the report. In the case of a written report, a suggestion would be to include the following:

- Legibility
- Length of report
- Organization of report
- Spelling and use of grammar
- Effectiveness of writing style
- Use of references and exhibits

## **STRUCTURING THE COURSE**

Unless the class is very familiar with the case method, we recommend that the students carefully read the chapters or readings assigned relative to the case learning methods. Many times appendices are available and useful. Begin the case analysis in the class with a consideration of key strategy makers and corporate governance. Consequently, we like to begin with open class discussion of case assigned. The next logical step deals with questions of social responsibility, ethics and environmental factors. More complex and comprehensive strategic management and marketing cases follow.

The next cases that might be considered deal with many aspects of strategic management or marketing and (for the most part) are equally appropriate for oral presentations, written reports, and strategic audits. These can be assigned depending on the steps they emphasize in the strategic decision-making process and/or on the basis of difficulty/complexity. They range from large business corporations to small, entrepreneurial firms and are organized on the basis of industry.

Some of the cases can be used in conjunction with other cases to emphasize a particular issue or strategy, such as growth through acquisitions, retrenchment, or entrepreneurial ventures.

It is recommended that the marketing cases be categorized by decision process and level of difficulty. The level of difficulty and complexity is categorized by the following:

- Early Use Cases - These cases are generally easier to analyze and tend to generate a good level of student interest and enthusiasm. Number crunching is reasonably low.
- Mid-semester Cases - These cases tend to be a little more complicated and involve more number crunching

or analysis.

- Late Uses Cases - These cases are generally very complicated and fairly difficult to analyze. They require a lot of analysis and number crunching.

There is no “correct” answer to any case. There may be several “good” answers and many poor ones. The purpose of strategic management, marketing, and entrepreneurship course discussions should be to help the student to understand the nature of “better” answers, what to look for, how to analyze alternatives, and how to see through the complexities of arriving at and implementing solutions in real organizations. The total number of variables in a real strategy situation is typically beyond the capacities of any one person or group to control them all. Hence, the students should be warned that they should not rely on what a company actually did to be a thorough guide to action. The company may have succeeded or failed — not because of its specific decisions — but they are in the right place at the right time currently. We all know that in a dynamic environment that their continued success will probably be challenged.

Despite their complexity, cases should be kept brief or as short as possible. Many are written in a lively style that captures some of the flavor of the real organizations.

Many times there are “decision points” in good business cases, however, case materials immediately following such decision points consciously leave out much of the detail on what actually happened so that students can arrive at their own specific solutions. They later see these in the context of a longer horizon—much like a mystery story that unfolds in phases. They should analyze the specific situations, consider alternatives, and arrive at explicit conclusions - understanding the later events might have looked a bit different if their solution had been implemented. As in any god mystery story, the case provides many clues – never quite all those actually present – but, surprisingly, often more than most executives would have had time to absorb in the real situation.

It is believed that no “canned” approach is viable for all strategic marketing situations’, the best approach is the use of cases that cut across a variety of issues and theoretical constructs.

Case studies can be taught in a variety of sequences. It is recommended that a extra cases be used for three purposes: (1) as possible examination cases which students do not already have access to, (2) as extra cases to increase emphasis selectively on one or another sections of your course or to expand the conceptual material, and (3) as extra cases to create industry groupings of cases.

## **STUDENT PREPARATION AND CLASS DISCUSSION USING CASE STUDY METHOD**

Many cases have a few questions at the end of most of the cases. These are designed to help students see relevant issues, but not limit or channel their thinking. Students generally find such questions helpful in organizing their thinking about the case. However, it is recommended that you substitute your own set of questions designed to achieve your own specific objectives. Whatever the questions, students should also be expected to do the following in preparation for class discussion: understand the facts (by underlining them or whatever), identify the main issues presented by the case and cluster the facts around those issues, lay out feasible alternatives for action, evaluate those alternatives, choose the “best” one, and consider issues of implementation relative to that of course of action.

Students who have followed this process should be able handle any questions you pose in the class itself. We believe that the class discussion should build on their preparations and carry them into further depth rather than require students to recite the results of those preparations. Many cases have teaching notes that organized to facilitate this level of discussion. They provide a thorough outline of how the case can be taught, key questions, concepts, and analytical data needed. Because the cases are complex, the teaching notes are purposely quite thorough. A skilled academician should have little difficulty teaching case method.

There is no “correct” answer to any case. There may be several “good” answers and many poor ones. The purpose of strategic marketing discussions should be to help the student to understand the nature of “better” answers, what to look for, how to analyze alternatives, and how to see through the complexities of arriving at and implementing

solutions in real organizations. The total number of variables in a real strategy situation is typically beyond the capacities of any one person or group to control them all. Hence, the students should be warned that they cannot rely on what a company actually did to be a thorough guide to action. The company may be succeeded or failed – not because of its specific decisions – but because of luck, an outstanding personality, the bizarre actions of an opponent, international events over which it had no control, and so on. One of the products of a successful strategy discussion should be to bring out the full dimensions of these “unknowables”.

Many professors choose to limit the students to using only the materials contained in the case. This keeps the students from “second guessing” the top management’s decisions. On the other hand, other professors may find it useful to allow the students to do whatever library research they wish. This allows the cases to remain vital and living, up through today’s headlines. Very often, issues developed in the case will show up in *The Wall Street Journal*, *Business Week*, *Fortune*, or other business media during the week in which the case is taught.

Written assignments can easily be developed using discussion questions and teaching notes for each case. In addition, the devices described below can be used to integrate concepts presented in the chapter text with the case material.

### **GRADING OF WRITTEN COMPREHENSIVE CASE REPORTS**

The grading of a written and oral comprehensive report is often aided by the use of case evaluation forms. Items to be addressed in the form or legibility, length of report, organization of report, spelling and use of grammar, effectiveness of writing style, use of references and exhibits, environmental scan assessment, problem identification, achievement of goals and objectives, strategy formulation, implementation and audit assessment and recommendations. Written assignments can easily be developed using discussion questions and teaching notes for each case.

### **ADDITIONAL GUIDELINES FOR PREPARING CASE ANALYSES**

We never have all the information to make decisions because of unavailability, cost, or time constraints. So, be practical and make assumptions based on the information available. There is no one best solution to a case study. The justification for the students recommended strategies are what is important, not knowing the actual solution or decision. No organization can possibly pursue all the strategies that could potentially benefit the firm. One must be realistic. Estimate how much capital will be required to implement what you recommend. Never make generalizations about cases. Be specific by telling what, why, when, how, where, who, and describe material clearly.

Encourage students to be open-minded and to be creative and original. Do not necessarily recommend the course of action that the firm plans to take or actually undertook, even if those actions resulted in improved revenues and earnings. Some additional recommendations in structuring your course:

- Categorize your cases by strategic decision-making process.
- Establish strategy formulation in the beginning of the course, implementation, evaluation, and control toward the end of the course.

There are other types of case studies that will be presented, but the majority of different case study methods are variations to the above methods.

### **CASE STUDY CONSIDERATIONS IN THE 21ST CENTURY**

Although the curriculum changes every four or five years, the external environment in which business education should be taught is constantly changing. The sponsorship of case studies, written by researchers in higher education for the business classroom, has been widely supported by instructors. Case analysis has become both a learning and assessment tool. This is not to imply that other areas have a static external environment and it could well be argued that other areas of the curriculum such as science, design and technology, information technology could



learn from this as a way of meaningfully linking theory and practice.

- Business education will have increased emphasis upon the importance of developing knowledge-based strategies. Sponsors of educational resources seem to be learning more about education and their own practices as learning organizations. Though this process decision makers from many of these organizations have developed a fuller understanding about learning practices, which they then have the capability themselves to use.
- It is obvious that case studies are an important solution to meeting the needs of business students to develop a full range of skills such as analytical skills and logical judgment, communication skills and self-analysis skills, to which Eason (1982) has attributed the term ‘creative problem solving’. Case studies within groups help students both to improve their depth of learning and their intrinsic motivation by moving them away from more passive classroom techniques to situations where they participate more actively (Liao 1996).
- The Internet will provide faster and more accurate information and feedback.
- The expanded utilization of nanotechnology will have a tremendous positive impact on case study methodology by providing significant information immediately.

#### **ADDITIONAL CONSIDERATIONS**

- The effect upon the curriculum and how it is delivered — this kind of resource could develop a new autonomous kind of learner, with a range of skills, developed partly upon the basis of their experiences with case analysis.
- Feedback on the method is built into the method. As we learn more about case study both the quality of the studies and their ability to provide experiences for analysis should lead to continual methodological refinement.
- The potential for teaching and learning using case analysis to develop student levels of response in assessment situations.
- The different uses of case study by teachers within classroom situations.

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**NOTES**