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A case study of case studies: producing real world learning within the business classroom

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Abstract

Teaching and learning about business organisations and the environment in which they operate is contained within a curriculum but context and events in which they operate is constantly changing. In responding to this context one solution is to construct and use case-studies, but these are (a) time-consuming and expensive to produce (b) need constant up-dating (c) may be unsuited for classrooms. This paper shows how these

problems have been overcome by using an innovative methodology based in a continuing public-private partnership (1994-present) between H.E., schools and business organisations. The organisations 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. The paper argues for a way of producing curriculum materials which itself constitutes a methodological contribution to the uses of case-study in research-based learning. [back](#)

Introduction

The paper argues for a way of producing curriculum materials which itself constitutes a methodological contribution to the uses of case study in research-based learning. It is focused on the particular case of teaching business studies in schools. However the methodology may well be transferable to other areas of the curriculum and to other phases of education.

Teaching and learning about business organisations and the environment in which they operate is contained within a curriculum. But the context in which organisations 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. However there are obvious problems with producing suitable case studies. They are (a) time-consuming and expensive to produce (b) need constant updating (c) may be unsuited for classrooms. This paper shows how these problems have been overcome by using an innovative methodology based in a continuing public-private partnership (1994-present) between Higher Education and business organisations. The organisations 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. The paper discusses practical, ethical and educational problems that arose during the first few years and shows how they have been overcome. It also outlines some unexpected advantages of the method for the production of educationally valuable case studies. Finally it summarises some of the outstanding issues that still need to be addressed in relation to this method of producing educationally valuable resources. [back](#)

The problem of getting case studies and keeping them up to date

Within UK schools business studies is a young subject area. First introduced in the 1970s, it gained widespread acceptance during the 1980s. Although not included as a National Curriculum subject, business studies has a key role to play in providing specialist courses and in recent years has been one of the fastest growth areas in post 16 education (Needham, Dransfield, Yeomans and Howkins 1990). The newness of the subject has meant that it is less constrained by traditional expectations – or vested

interests in particular resources or areas of skill – than would be true of older subject areas.

Business studies gains much of its appeal because of its perceived relevance to the modern world. Teaching and learning about business organisations and the environment in which they operate is contained within a curriculum but the context and events in which they operate is constantly changing. The inter-related and dynamic nature of this environment means that organisations have to constantly analyse 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 UK. These core resources provide traditional and necessary resources for young people. However, in a modern and active learning environment that is constantly changing, even though these texts will contain case studies, both teachers and students want more than ageing texts to bring subjects to life. Information within case studies in textbooks is often second hand and adapted from articles in business magazines. Cases tend to be short, limited and have been repurposed for educational use, with a subsequent loss of usefulness.

Young people are more likely to transfer knowledge if they can link their learning to current issues that are more relevant to them. In particular, in the field of business, where the world is ever changing, teachers look for resources to reflect all of the events within the external business environment that complement lessons learned from textbooks. The behaviour of and decisions made by managers of all different types of organisations provide a basis for students to understand how what is taught is mirrored within a business environment. However this implies using a curriculum based on material that, unlike most mainstream texts, draws on what the managers actually do within the changing context in which they act.

One solution has been to use case studies. Case studies have been widely used as a teaching and learning methodology in areas such as Law and medicine for many years. 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.

It has, however, been widely observed that it can be difficult to get agreement on what constitutes a case study. Lincoln and Guba (1985) stated:

While the literature is replete with references to case studies and with examples of case study reports, there seems to be little agreement about what a case study is. (p.360)

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 enquiry which:

allows investigation into a contemporary phenomenon within its real-life context, especially when the boundaries between the phenomenon and context are not clearly evident. (p.13)

The investigation can be explanatory. As Robson (1993) remarks, the case study answers 'why' and 'how' questions. Sturman (1994) broadly agrees:

Human systems develop a characteristic wholeness or integrity and are not simply a loose collection of traits. ... to generalise or predict from a single example requires an in-depth investigation of the interdependencies of the parts and of the patterns that emerge. (p.61)

So does Stake (1995), who describes doing case study as 'coming to understand the activity [of a single case] within important circumstances' (p.xi):

The case is an integrated system. The parts do not have to be working well, the purposes may be irrational, but it is a system. (p.2)

All of these descriptions of what it is to do a case study show that case studies are indeed one solution to meeting the needs of business studies students as outlined above. Indeed it has been argued that using case studies within a classroom as a basis for case analysis develops a range of skills such as analytical skills and logical judgement, communication skills and self analysis skills, to which Eason (1982) has attributed the term 'creative problem solving'. Indeed Liao (1996) explains that using 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.

But there are obvious difficulties with this solution. In the first place, even one case study developed or based upon a real organisation is time-consuming and expensive to produce. Case study material of the sort that details an organisations action, strategies and behaviour is not readily available, despite the development of the internet and the availability of information packs. The problem is that much of this information is of limited value, as it has not been specifically written for educational purposes. Within the classroom a large number of studies are needed in order to demonstrate the range and particularity of business decisions and actions. Some of the studies required are those which focus upon a particular part of the organisation such as human resource management, or marketing strategies, while others should be synoptic in nature, to illustrate more widely how the different parts of an organisation operate together within a cohesive decision-making framework.

The production of a case study usually makes heavy demands on the researcher. Typical methods are likely included any or all of the time-consuming techniques of qualitative

data collection and analysis. These are well surveyed in a number of books, for instance, Becker, 1998; Bryman and Burgess, 1994; Denzin and Lincoln, 1994; Schratz, W and Walker, 1995. It is usual for research to be based on one or two - occasionally as many as ten - case studies, and for it to have taken some years for a researcher to produce just these few.

Further, having produced the study or studies, they will soon be out of date. Since the point is to have relevant material that is clearly related to current conditions any case study will soon need updating if it is to remain relevant. The time and difficulties of producing the case studies by the usual method is multiplied.

Finally the case study has to be usable in the classroom, so it has to relate to the curriculum. This means that it has to pay attention to how 'case-bound features of an instance might relate to a multiplicity of classes' (Adelman *et al.*, 1980, p.50). This puts into the category that Bassey (1999, p.62) calls 'theory-seeking and theory-testing' rather than 'story-telling and picture-drawing' or 'evaluative'. A case study produced by a researcher with no knowledge of the business curriculum may well prove unusable for detailed study. The problem of making a case study educationally useful is intensified since the researcher must not only obtain access to the organisation, but the results have to conform to educationally ethical standards. In particular, the gatekeeper allowing access to an institution must accept that the material cannot be used unethically as a marketing or public relations tool for the company. [back](#)

A solution to the problems of producing a large number of up-to-date case studies.

In the last section it was argued that traditional means of producing case studies mean that case studies are time-consuming and expensive to produce. But in order to be useful in the business studies classroom, they would need to be relevant, rigorous, up-to-date, and unbiased. Therefore traditional methods of developing case study techniques as part of the learning process was not able to produce sufficient and up-to-date studies to be useful. This section shows how these problems have been overcome by using a innovative methodology based in a continuing public-private partnership (1994-present) between H.E. and business organisations. Many organisations want to make a positive contribution to the education of young people and this paper shows how their actions can form the basis for developing an educational resource.

(a) Case studies need to be produced quickly and cheaply. They also need to be rigorous and unbiased.

In 1989, working with a commercial publisher within the UK, a teacher-educator of business studies was involved with developing a file of case studies. Launched in 1990 with fourteen case studies and called On Target, the resource was sent to every school and college within the UK. Each participating organisation paid to be included in the pack. It meant that for a relatively small fee and co-operation within the process, one or more details of an organisation's business strategy or actions would be widely circulated to students. It was a low-cost way for them to become involved in education and it was

hoped that the resource would bring up-to-date information into the classroom and encourage active learning using attractive and up-to-date materials that both students and teachers alike 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. It was hoped that the cases would provide vitally 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 had to be both interesting and rigorous. The pack was perhaps best known for the case study which described the readjustment of the marketing mix of Smarties in the face of competition from M&Ms who entered the bite-sized sweet market in the UK during the 1980s. This case discussed a range of injections such as new promotions, improved targeting and segmentation and analysed the affect of a number of strategies such as the launch of the blue Smartie upon the product life cycle of the brand.

This partnership 'invented' what was widely considered to be a new concept in the development of sponsored resources. Before writing each study the educator both talked and advised staff from each sponsoring organisation about curriculum needs and requirements, as well as what would or would not make a good case study. The process of preparing case studies was eclectic and more usually than not, involved using a range of methods. Data collection usually depended upon the sponsor of the study. Although some studies were written on the basis of personal interviews, others were developed after access had been gained to what had before been confidential data. Given the use of brand or organisational names within case studies and the fact that each organisation had its own 'agenda' or educational objectives, it was particularly important that each was strongly advised so that case studies would be ethically-based within the guidelines produced by the National Consumer Council within the UK. These are there to ensure that sponsors do not present overtly promotional materials to children under the guise of objective information. From the early stage it was particularly important that appropriate language was used so that each case was not viewed as another success story! Words that embellished brands or actions were replaced and theory and principles rather than products were placed at the heart of each study. And, of course, it was important to ensure that the educationalist rather than the sponsor would have the final word about the ethical nature of content.

Although as an innovative learning resource On Target was well received by teachers, it lasted for only one edition. In 1991, the external business environment within the UK was in recession, and this made it difficult to find sponsors to finance another resource. Another problem was that On Target did not have the drawing power or the name that would interest organisations in sponsoring part of a resource.

During 1994 the same teacher-educator met a number of senior managers from Times Newspapers. The focus of the conversation was upon how Times Newspapers could make a positive contribution to teaching and learning processes within the business classroom. After much discussion, it was agreed that The Times 100 brand could be

developed and used to encourage sponsors to become involved in an ongoing educational initiative that would bring case material into the business classroom.

(b) Case studies need constant up dating if they are to remain relevant.

The first edition of The Times 100 was launched in 1995. It comprised more than fifty sponsored case studies from both private sector organisations and government departments and since then new case studies have been written, sponsored and distributed annually. Today The Times 100 has become a brand name that has been welcomed by teachers and supported by individuals and organisations in the public sector as a partnership through which private businesses can make a positive contribution to how young people learn in the classroom. In fact the 3rd Edition was launched in 1998 by David Blunket, the Secretary of State for Employment and Education and the 4th was launched by Steven Byers, the Secretary of State for Trade and Industry.

The Times 100 has itself over its short life span provided a good example of how the business environment has changed. For example, in the first edition a number of the case studies emphasised the possibilities of using technology to provide customer service and develop relationship marketing within a financial services environment. By edition three this theme had disappeared and, co-incidentally with the election of a new government in the UK, many cases placed emphasis upon the notion of responsible management with references to sponsorship, team working, empowerment, stakeholders and sustainability. Integrated transport systems, supply-chain management and logistics were the clear theme at the heart of the fourth edition while, more recently, there has been a movement completely away from traditional retailing with more cases contributed by high technology companies such as Microsoft, Freeserve and Marconi Communications.

From the outset it was important to develop a mechanism that would make it possible to analyse and respond to feedback from teachers. Evaluation involved feedback from questionnaire analysis and focus group activity with both students and teachers. The publishers of The Times 100 also sponsored an educational research project. Initial findings from this project showed that 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. The research also showed that the resource actively developed student's analytical skills, by learning to organise, classify and evaluate data presented in the case studies. There was also strong evidence to show that case analysis developed student's theoretical knowledge, increasing their ability to transfer concepts. The strength of the resource in terms of contextualising business theory was the most positive response. According to the research findings, case analysis is used in such a variety of ways in the business classroom that it contributes effectively to a variety of different outcomes.

Over the years the responses from both the evaluative and educationally based processes have led to:

- more guidance for teachers on the delivery of materials;

- cross-referencing of cases through a curriculum matrix;
- a teacher's guide;
- better design;
- the ability to link purposeful case analysis to Key Skills;
- the development of a CD-Rom and a web site (www.mbapublishing.co.uk) which include exam papers, marking schemes, lesson plans, revision materials, hyperlinks and other financial information.

(c) Case studies must be educationally suitable.

In order to be suitable educationally the case studies need to be cross-referenced to the curriculum and be both practical and theoretical. The starting point for writing any of these studies has been to think about how the actions of the participating organization could be interpreted and synthesized in such a way that young people could develop insight into the world of business. In most circumstances manager's organizations respond positively to advice upon the educational value of their 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. For example, a recent study written about the relationship that Rolls Royce has with its suppliers of parts of their Trent aero engines which focused upon the fascinating area of financial risk and revenue management and had plenty of educational theory and value, was criticized by a public relations manager as she wanted it to be interesting as the story of the worldwide franchising of Coca-Cola. Parts of the study were written in a way that tried not to devalue the content.

Each of the studies has been designed to enrich classroom experiences. The starting point for every study has been the curriculum. There have been occasions when it has been necessary to advise organizations not to choose a particular study. For example, if an organization wants to focus upon a teen area such as make-up in a way that provides too much product emphasis. Studies also have to be ethically based, taking into account the advice of teachers. There are no case studies on alcohol or tobacco. Although a condom manufacturer showed interest in developing a study, it was not written in case it offended teachers in Catholic schools.

The process of using case studies to draw out learning outcomes was relatively new for many teachers of business studies, 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. [back](#)

In conclusion: The future of case studies for the learning business

A methodological contribution to social research

The development of The Times 100 as a partnership between the public and private sectors, has demonstrated that rigorous case studies can be written in large numbers. While this has particular educational application, it is in itself a contribution to naturalistic social research. The process provides insight into data collection methods for case studies designed for an educational setting, the use of case analysis as a form of teaching and learning enrichment, ethical dilemmas and the practice and problems of developing and maintaining ethical relationships through the process of sponsorship as well as case analysis type and data analysis.

Some spin-offs for education

1. 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 teachers. Case analysis has become both a learning and an assessment tool in this field within UK. 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.
2. This paper exemplifies that in the area of business education, with increasing 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 organisations. Though this process decision makers from many of these organisations have developed a fuller understanding about learning practices, which they then have the capability themselves to use. In fact many of the case studies have been used within the host organisations as the basis for developing training materials. [back](#)

Issues outstanding

Although these issues are mentioned here in brief outline, they will be more fully discussed in future papers, planned for next year. For example:

1. 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.
2. 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.
3. The potential for teaching and learning using case analysis to develop student levels of response in assessment situations.

4. The different uses of case study by teachers within classroom situations. [back](#)

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