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Teaching with the case method: opportunities and problems since the COVID-19 pivot to online

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Teaching with the case method: opportunities and problems since the COVID-19 pivot to online

Abstract

Purpose: This paper aims to detect the opportunities and problems when teaching with cases since the COVID-19 pivot to online.

Design/methodology/approach: From a qualitative phenomenological approach, both authors reflect on the pivot to online of the case method teaching in their master's level courses in Colombia and the Dominican Republic.

Findings: The reflection allowed the authors to validate that the questions before and during the debate and the voting are resources equally valuable for discussing cases in the traditional classroom and online. However, the authors observe a pivot to teaching with cases online from the COVID-19 pandemic in aspects such as teamwork requiring more time in online class due to internet problems or students' slowing down. The instructor's viewing of teamwork is intermittent and causes feeling out of control. Working with cameras on or off generates different results in the students, in the teaching-learning process and in the results, which require instructor's good judgment decisions. The online discussion planning and organisation demand flexibility and empathy by the instructor, to promote a more significant student-student interaction, which, in our experience, is limited in the virtual environment. Finally, working with cases online generates and requires additional skills in the instructors to those of the traditional classroom.

Originality/value: The study's originality consists of identifying the main divergences between face-to-face and online teaching with the case method, from the COVID-19 pivot to online. The study's value is to warn instructors of problems that may arise in online teaching with the case method, for which recommendations are made.

Keywords: Online management education, Case method, Business case, Teaching with cases, Reflection

Paper type: Reflection paper

Introduction

This paper's main objective is to detect the opportunities and problems when teaching with cases since the COVID-19 pivot to online, based on the authors' experiences from their master's level courses in Colombia and the Dominican Republic.

To achieve this objective, the authors follow a qualitative phenomenological approach in the research. Both researchers apply the case method in an online class with a business case written by themselves. After that, they follow a questionnaire to reflect on their experience, for finally comparing the results with their previous practice using the case method in a face-to-face environment.

Gavin (2003) considers Harvard Law School's faculty the pioneers using the case method, starting in 1870. According to DeLacey and Leonard (2002), Harvard Business School followed them in 1911. Since both schools' success, Business Schools have widely accepted the case method.

The current technology can facilitate the use of the case method online, allowing interaction, discussions and groups work, accessing work sessions recordings, submitting assignments, and connecting with other students and professors (Bisoux, 2020).

Nonetheless, teaching with cases online possess new challenges in times of COVID-19. Schiano (2020) states that these challenges are: distractions related to the pandemic's new life circumstances, Internet quality of access and other technical problems, student's engagement, higher cognitive load for students related to time in front a pc, higher cognitive loads for instructors dealing with monitoring students participation and devices, online classes require more scaffolding, isolated dialogues between the instructor and individual students, difficult in getting a conversation going among students, and a lack of physical cues that usually moderate discussions in the classroom environment.

Schiamo and Narayanan (2020) add the following challenges: time lags due to psychological and technological reasons, less connectedness, lack of focus, loose of intimacy, absence of body language, lack of control of the environment, and an image of lack of professionalism that can derive in the reduction of commitment.

As Morris (2020) asserts, those challenges require more investigation, but little research exists to help instructors' transition to teaching with cases online.

Literature Review

According to Gavin (2003), business cases describe real organisations and business issues. The case method requires students assuming the role of the protagonist and making one or more critical decisions. Case information is often deliberately incomplete, allowing for many possible options. The case method primary goal is to encourage student-to-student dialogue, debating around a few central questions that prompt conflicting positions, perspectives, or points of view. As a result, the method helps students develop diagnostic skills, persuasive skills, and think and act distinctively.

Alstete and Beutell (2016) summarise that the usual teaching process with cases includes oral classroom discussions, written case assignments, online case discussion boards, individual or team presentations, and other quantitative and qualitative analysis by students.

There are several prior studies on teaching with cases. However, there are few regarding teaching with the case method online. Arbaugh and Hwang (2015) identified this scant prior research, with only 24 % of most-cited articles in Business and Management Education from 1970 to 2014 were about online/hybrid learning. Nonetheless, none of them focuses on teaching with cases online. Bacon (2019) states that there is little rigorous research on how best to teach with cases, so he urges researchers to conduct additional research in the case method.

When teaching with cases online, Webb, *et al.* (2005) set the instructor, pedagogy, student, and information technology usage, as independent variables, affecting course performance. Nevertheless, Arbaugh, *et al.* (2013) choose to limit their research focus to instruction and instructors considering they can quickly disseminate research results and be responsible for the teaching-learning process.

Adittionally, Bergom (2015) observes the limitations of the existing literature about online instructors' experiences and knowledge, as it lacks theoretical grounding. That is why the authors find suitable Simonson's equivalency theory of online learning as their theoretical framework.

Theoretical framework

The fundamental thesis of Simonson, *et al.* (1999) equivalence theory of online learning is that "the more equivalent the learning experiences of distant learners are to those of local learners, the more equivalent will be the outcomes of the educational experiences for all learners" (p.70).

Simonson, *et al.* (1999) explain that local and distant learners have different environments where to learn. It is the instructor's responsibility to design learning events and experiences with equal value for learners. That supports Arbaugh, *et al.* (2013) focus on instructors and their central role in creating equal value for students in both learning environments: online and face-to-face.

The above implies that instructors create learning experiences of equivalent value for learners regardless of the course delivery medium (Lapsley, et al., 2008). Simonson, *et al.* (1999) reinforces that students should have learning experiences tailored to the environment and situation, but the outcomes should be equivalent (Simonson, et al., 1999).

The equivalence theory of online learning is chosen as the theoretical framework for this study because, as mentioned above, the case method has traditionally been employed in a face-to-face learning environment. With the emergence of COVID-19, several business schools have moved online, and cases have also migrated to virtual learning environments. However, students learning expectations are the same as before the pandemic. Therefore, we understand that far from decreasing the use of the case method in virtual environments, instructors must focus on how to play their role to achieve equivalent learning experiences with the case method.

Methodology

The authors chose the qualitative phenomenological research method known as *reflection* for this study. Lien, et al. (2014) specify reflection as the process to effectively and unbiasedly understand a research participant's life experience and clearly communicate this. The research process consisted of:

- 1. Running and recording the online class in each country.
- 2. Individually viewing the recordings.
- 3. Individually reflecting on the class.
- 4. Jointly comparing both results.

The instructors applied the case method in their online class as follows: introducing the case to the students, giving them time for individual reading, guiding the teamwork in breakout rooms, and returning to the classroom discussion. Except for the teamwork in the breakout rooms, everything else was recorded for later viewing and reflection.

For the reflection on the class, the researchers developed a questionnaire -see Appendix I. Questions were structured upon the challenges stated by Rollag (2010). Schiamo and Narayanan (2020), focusing on the instructor role for dealing with those challenges. The dimension considered were *promoting the student's self-preparation, virtual teamwork and the instructors' role, interaction with cameras on or off, classroom discussion facilitation, participation and student-student and student-instructor interaction, and enhancement of instructors' skills.* As presented in the results and discussion section, support was found in the literature for each of them.

The research took place in Universidad Externado de Colombia, located in Bogotá, capital of Colombia -a prestigious Latin-American private university, which stands out in social sciences and economics. Universidad APEC (UNAPEC) was the second research scenario, placed in the Dominican Republic's National District, and with campuses in other regions of the country -a private university considered a leader in the management and business education in the Dominican Republic. Table 1 shows general information about the class groups.

(Table 1 around here)

For their online synchronous class, the authors used a jointly developed business case entitled "____". It is a library case written in English for the *Journal of the International Academy of Case Studies*. (_____, 2020) case was written for teaching and publishing purposes, and it deals with both author's experience with a business problem of technological significance in e-commerce. Although the courses are different, both researchers approached the case from the same answer: *How to design an e-commerce project better and avoid the pitfalls committed by this company*? Despite both Business Schools use the case method in their courses, it is not mandatory, but the instructor's decision.

Both researchers were trained with the case method by professors from the Centre for Management Studies, in the University of Havana, Cuba, and from ESADE Business School, in Barcelona, Spain. The Dominican University instructor participated at the Harvard Business School program *Global Colloquium on Participant–Centered Learning*.

Results and discussion

In this paper, the authors chose the Long Data Excerpts approach for presenting information in qualitative research, in which conversational exchanges structure texts employing large text segments throughout the manuscript (Salamzadeh, 2020). Segments of the self-interview results from the two instructors from Colombia (CO) and the Dominican Republic (DO) are shown in the subheadings below.

Promoting the student's self-preparation

CO: "I checked the students' self-preparation with questions from the content taught in previous classes. I applied closed questions to confirm the aspects; as well as open questions that allowed to link the learned topics".

DO: "I ensured the self-preparation of the students by guiding several open questions in the Learning Management System (LMS). I then took these questions as a basis for teamwork and classroom discussion".

Passyn and Billups (2019) recognise the value of written case analyses on ensuring that each student has prepared the case and decided on a single course of action. In our experience, asking for previous open and closed written questions in the LMS, ensures students' readiness for the discussion. Asking previous questions with adequate notice, instructors can see the students' participation scenario in advance during teamwork and classroom discussion. As a result, the strategies for team building and classroom discussion can be better aligned. In times of COVID-19, anticipating scenarios and participation in class can be essential for achieving better results.

Virtual teamwork and the instructors' role

CO: "I think the time given to the students was appropriate. There were no teams that did not finish. It is always a challenge for me because I do not know if it is possible to achieve it in the established time, considering that technical problems may occur that do not allow us to meet the deadlines. However, in this case, it did not happen".

"The chosen video conferencing app allows establishing workout rooms, where students can perform teamwork. However, this situation becomes too complicated because many students do not participate in the discussions, excusing themselves because "they dropped the connection".

The amount of participation of a student is an aspect that is possible to visualise in the face-toface mode. In the online mode, the app only accounts for the student's total hours in the session and does not divide those belonging to classroom discussion and workout rooms. The above means that not everyone participates in the teamwork in the same frequency and that the discussions are impoverished".

DO: "For this case, I was not able to calibrate the time for the workout rooms. Although I initially gave 30 minutes, it was needed to extend it by ten minutes, another ten, then five, and so on. Some teams had problems with the internet. Some students had not read the case previously, and some teams decided to reread it. The above resulted in some teams finishing early, while others were lagging, which affected the planning's fulfilment".

"I cannot simultaneously visualise different workout rooms, and I must connect individually, team by team, which sometimes makes me uncertain about how the group work is developing. When this takes place in a physical classroom, I can see which team is working, which one is not, and even the quality of the interaction and participation of each team members".

Arbaugh, *et al.* (2013) propose to rethink instructors' roles on teamwork when teaching online to use time better. That leads us to rethink our planning for future teaching with cases. It would be advisable to calibrate the approximated time taken in teamwork in the first class of the program to validate the moments of carrying out group activities. As an alternative, it would be desirable assigning the teamwork outside the online session, as it is usual at Harvard Business School. As one competence to develop in students is teamwork, the instructor role must be ensuring feedback mechanisms. In doing so, instructors could use both the LMS and the classroom discussion debate. However, under stress conditions because of COVID-19, this planning must be flexible.

Lights, cameras, action!

CO: *"I am aware that being with the camera on consumes more bandwidth and in many cases (where the internet is not good) it is necessary to decide between listening or watching. For this class, I always kept the camera on. However, this was not the case with the students".*

DO: "Although it is a university policy that everyone, both students and faculty, should interact with the cameras on, some students are still reluctant to work with the cameras on after several courses have passed during the pandemic period. In the interest of making students more

comfortable, I am not enforcing the policy. I know that I am missing an important aspect, which is non-verbal communication, but I do not consider this to be detrimental to the results and the achievement of goals by working with cases".

Blau, *et al.* (2017) recommend that instructors should let the learners decide whether to use the webcam in a synchronous session rather than command all the participants to use two-way video communication. Different personality traits of the students play a crucial role in this recommendation.

Although we recognise, we are missing one crucial part of any discussion: body language and facial expressions, we agree with Blau, *et al.* (2017). We consider technical issues such as the internet bandwidth and others of a psychological nature that may affect the students' self-confidence for putting themselves in front of a camera. One aspect to consider in these conditions of COVID-19 is that students now taking their master's programs online did not choose to study online. Otherwise, they would have enrolled in one of the many universities' virtual programs from the very beginning. Therefore, it is necessary to be empathetic and leave the camera's use to the students' choice.

Classroom discussion facilitation

CO: "In general, I plan the order of the questions looking for each one to lead to the next. However, this is not a straitjacket. I prefer not to paralyse the debate".

DO: "Sometimes students do not follow the order of discussion proposed by the instructor, thus "killing" the debate's richness. In such situations, I need creativity and improvisation to redirect the discussion and to be able to exploit the different edges that the case allows approaching".

Schiano and Andersen (2017) recommend making people feel comfortable and embody the instructor's culture in an online discussion. One should start by asking questions to spark discussion, and then guide the conversation through further questions, comments, and structuring until it is time to close the discussion and move on. Instructors need to balance exploration and focus and resist the urge to respond to every student but letting them develop the discussion.

Our experiences tell us it would be advisable to negotiate the psychological contract with the students at the beginning of the course, as Schiano and Andersen (2017) recommend, establishing the game rules that guarantee participation and debate. Although psychological

contracts are a usual practice before COVID-19 times, in online management education, we must reinforce them by proactively instructing students about the usual lack of student-student interaction in the online scenario.

Participation and student-student and student-instructor interaction

CO: "I understand that online classes make the instructor-student relationship easier than the student-student relationship. To encourage the second type of interaction, I use various forms such as setting up small groups that allow for timely discussion. Working with small groups works very well for me. I also apply online polls, and with the results, students exchange or support their vote in front of other students. However, the interaction after voting generates some disorganisation in the interventions. I try to get students to participate by "raising their hand.

I understand that, just like in traditional classes, participation is not equal. Some students prefer to write and not to speak, but the virtual environment has helped them break down stage fright.

I seldom use cold calling. I prefer to develop questions where students do not feel attacked in public but allow them to contribute freely and retain knowledge.

I consider the experience in the virtual environment to be good and enriching. However, it is limited by the virtual space where, logically, the intervention is more controlled when it comes to sharing experiences and positions. The above causes explanations, debate and proposals to be more reduced".

DO: "I have the perception that online learning does not favour student-student interaction. Perhaps the non-visualisation of participants in a real scenario creates further distances between students, which does not motivate them to interact with each other. The change from a traditional classroom to a video conferencing app limits the fluidity of spontaneous interactions.

Thus, occasionally, some students connect with another student's idea or refute a previously exposed point of view. For this reason, I promote interactions by visualising the existence of opposing ideas that two students, or two groups of students, may have. At other times, I encourage a student who is raising his or her hand not to present the idea or answer he or she had for the initial question, but to support or refute the student's position in current use of the word. In any case, most of the time I am the one who intentionally encourages the interaction

that in the context of a traditional classroom can arise spontaneously. However, I do not use cold calling in its original design, as I fear students may perceive it too aggressive.

Even so, in the virtual context, I feel I have more control over the process's organisation. However, I perceive that if the discussion of cases does not lead to a final grade for the students, only about 30% of the class is motivated to participate, and it is always the same students who do it".

Gavin (2003) assumes that discussing cases helps students develop persuasive skills for diverse groups, in meetings and other public forums. However, Bacon (2019) does not take for granted this assumption. Besides the lack of agreement, we believe instructors must encourage participation and interaction among students.

In times of COVID-19, many universities have implemented online classes recording on a mandatory base for control purposes, and for the student to visualise the sessions again. Instructors and their students can jointly visualise specific moments of the interaction in the recordings, and instructors and the group can give feedback on students' participation and interaction to specific individuals and reflect on the group's interaction as a whole. That would be an additional scaffolding for the development of such skills.

Enhancement of instructors' skills

CO: "I believe that working with cases in the traditional context further enhances my leadership and self-management skills, while in the online setting, it improves my systemic skills".

DO: "The use of cases in physical classrooms has helped me be a more outgoing person and enhanced my observational skills. However, working with cases in virtual classrooms has allowed me to practice more active listening through inquiry and handling of virtual groups skill".

According to Aithal (2017), the instructors' roles when teaching with cases are: moderating the discussions, asking questions, monitoring the dialogue, supporting debate, and recording the frameworks used for analysing situations, concepts, models, and strategies used in the problem of the organisation, in order to engage students in a decision-making process of a challenging, interactive learning environment. For fulfilling those facilitators' roles, instructors must combine social facilitation skills and expertise (Ertmer and Koehler, 2018).

In our experience, working with cases online in COVID times has led to the strengthening of both instructors' teaching competencies. In the traditional scenario, we realise those competencies were developed to a lesser extent.

Based on the reflection and our teaching experience with cases before the Covid-19 pandemic, we proceed to establish the main convergences and divergences between both scenarios, following the goal of achieving equivalent learning in students (see Table 2).

(Table 2 around here)

Following the divergences shown in Table 2, we issue recommendations for pivoting the case method approach to teaching online.

Both for planning the teams' working time and the discussion's organisation, we need to be more flexible. Online discussions require the instructor to increase awareness to redirect the debate and assertiveness to turn interruptions into discussion opportunities.

Faced with the dilemma of cameras on and students more self-confident vs cameras off and zero visual interaction, we propose that the instructor test, for each group -and according to each participant's particularities- the convenience of the policy of cameras on or off.

To increase student-student interaction, we suggest a more active role for the instructor to encourage participation and provide feedback.

Finally, some problems are technological in origin. While technologies today make it possible to do what was not possible ten years ago, we encourage teachers to send suggestions to their providers and participate in their feedback forums. We have seen companies such as Microsoft introducing modifications to Teams to support teaching and learning processes during the pandemic.

Conclusions, recommendations, and limitations

From this reflection, we conclude that the Socratic approach of asking questions will reign as an essential part of teaching with cases online. Questions before and during the discussion will keep being a mechanism to generate reflection and debate. Similarly, voting will also be around in online teaching, but ICTs need improvement to ensure greater and easier participation in voting.

The COVID-19 pandemic has led to ICT's improvement. However, there is still a need for more and better features for teaching with cases. ICTs should evolve towards the simultaneous display of breakout rooms. Platforms that do not have order in student participation should establish it. Automatic adaptation of the video conferencing resolution to each participant's bandwidth is also desirable.

On the other hand, ICTs are still a challenge for instructors who need to increase their skills for managing online virtual groups. They should assume the same facilitator's role as in a face-to-face environment but should further enhance and promote student-student interaction, which, in our experience, decreases when teaching with cases online.

We verify that students limit their participation and interaction when debating a case since the change from a traditional classroom to a videoconference application limits the fluidity and spontaneity of the interactions.

We also verify that students' teamwork urges instructors to rethink the online classroom and explore the technologies' potentialities to guarantee all students' participation, being flexible and empathic. As instructors, we want to have visual control over teamwork. However, as facilitators, we may need to emphasise the teamwork value, the opportunities for group learning and individual growth by contrasting different experiences, thinking out the box, and assuming new roles.

Finally, instructors must deal with the contradiction of cameras on - cameras off and use good judgement, weighing what to favour: if greater student self-confidence and a higher possibility of distraction, or the pressure of stage fright in front of the cameras, as well as other technological pressures mainly associated with internet access of varying quality.

One recommendation for future research is to document the instructors' experience using the case method, not with one, but with several cases in the same course, using a qualitative action research approach. That would allow modifying and improving the process while validating the achievements during the course.

Conducting a similar study post-COVID-19 could also expand the knowledge of teaching with cases online. It would also validate instructors' skills and flexibility in planning and organisation, students' skills for virtual teamwork and online interaction, and ICTs evolution.

This research has limitations that make it necessary to read its results carefully. One limitation relates to the given comparison's groups composition. Researchers could not form the class groups in a random or deterministic way. It was coincidental that both were made up of 13 students.

Another limitation is that despite both are management programmes, the one from Colombia is more specific than the other from the Dominican Republic. Although both programmes have a contact point in project management and technological decision making, better correspondence between groups would be desirable.

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Appendix I. Questionnaire.

- 1. How did you ensure that students have prepared individually?
- 2. Did you feel comfortable with the time you give the students for teamwork? Was it enough for them?
- 3. How comfortable are you with students working in virtual teams, where you do not see them unless you enter each session?
- 4. How comfortable are you with interacting with students by voice only, without the camera?
- 5. How do you manage the process of classroom discussion online?

	Colombia	Dominican Republic
Master's programme title	Master's degree in Strategic Management of Information Technologies	Master's degree in Management
Course title	Research Fundamentals	Change Managemen
Total number of students	13	13
Year of master's programme	2 nd	2 nd
Total hours	24	40
Online hours	24	40
Recorded hours	24	40
Course duration (weeks)	4	5
Weekly frequency	1	1
Class duration (hrs)	6	8

Criteria	Traditional classroom	Online environment	
	Convergence		
Promoting the student's self-preparation			
Use of questions	Use of open and closed questions before starting classes		
	Divergences		
Virtual teamwork and the instructors' role			
Use of planned time	Adjustment to planned timing	More time required due to internet problems or slowing down of a student	
Visualisation of teams	Permanent	Intermittent	
Lights, cameras, action!			
Visualisation of participants	Permanent	Unpredictable, at student's discretion	
Classroom discussion facilitation			
Organising the discussion	Facilitated by the instructor's verbal language. Often all participants' language "leads" the discussion	Lack of eye contact causes students to break the order of discussion suggested by the instructor	
Participation and Interaction			
Speaking	Can generate stage fright	Cameras turned off leads to increased safety for some students	
Voting	Public and non-anonymous voting generates a more significant commitment to participation	Participation can be limited by technological problems, lack of app mastery and the anonymity generated by ICT	
Interaction	Physical proximity favours student-student interaction	More teacher-student interaction than student- student interaction	
Instructors' skills			
Enhanced skills	Leadership, self- management, outgoing person, and observation	Systemic skills, active listening and handling of virtual groups	

Source: The authors