

## **Effects of the Genre of Business Cases in the Business Communication Classroom in Higher Education Institutions**

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### **Abstract**

The academic research purpose of this paper is to investigate how teaching by the case method, as opposed to teaching business theories ex-cathedra or frontal teaching makes a positive change in the classroom in higher education institutions. The research reflects a singular longitudinal case study providing an initial point into implementation of the method. The research was conducted having in mind the outcome of actual knowledge as opposed to perceived knowledge by educators in learners. The paper sits on an amalgamation of theories backed up by empirical evidence or the moment where theory meets practice, making use of the Socratic<sup>1</sup> Method proposed in the new and improved classroom. Research has shown that educators are positively inclined towards this method, but there are opposing views, and the aim of this study is to suggest the measures to make this research successful. We take a close look into the transformation of the traditional instructor-based into a learner-based classroom. The major findings are supportive of discussion-based environment with the incorporation of the classical research method. This dichotomy is addressed; however, the solution proposition integrates both approaches, driven by the case method. Finally, the practical recommendations deriving from this analysis serve to further explore and deliver detailed recommendations for PCL (participant-centered learning), and result in better education of students for their future careers in business communication, preparing them for ambiguity and lack of fear of the unknown in their professional lives.

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**Keywords:** *Ex-cathedra;* *Frontal teaching;* *Knowledge;* *Socratic method;* *Instructor-based;* *Learner-based;* *Discussion-based;* *PCL;* *Business communication.*

## **Introduction**

There is a tendency envisioning the business classroom as a place where students should be free to express their opinions and also uninhibited when it is time to propose a solution to a situation they feel is radical or different to what the business ‘truths’ would recommend. The idea of the case method dates back to the time of Socrates. He did not have students, but followers to whom he posed a number of questions, and received that many answers. He was the first one to implement a discussion-focused type of teaching.

The purpose of this research is an attempt to bridge the gap between the ideas of fully integrating the case method in the modern business classroom, to look comparatively at the success or failure of this revolutionary undertaking. The concept of the study is to soundly support a well-developed theoretical debating ground and represents the more practical facet. It is a practical case study in itself rather than heavily reliant on theoretical frameworks and principles, meaning the paper will represent said characteristics. Through this comparative study we will try to identify the exact moments where this teaching method can aid and complement the teaching concepts intended, but also to attempt to pinpoint the moment where instruction resorts back to the instructor becoming the central point of the classroom and leader of the discussion.

The main goal of this research is to move horizontally through the answers from instructors in higher education institutions, and compare the conclusions they have arrived at whilst using this method of teaching. The research was conducted at University American College Skopje (UACS), Skopje, Macedonia, the only institution where the case method is fully implemented according to the teaching notes (TN) and instructions provided by the Harvard Business School (HBS) and Harvard Business School Publications (HBSP). The research is focused on the effects the case method will have on the learner and the face validity<sup>2</sup> of the cases themselves, from the instructor’s viewpoint. This research is longitudinal, stretching across five years, as well as using different resources of the relevant literature and making specific emphasis on and drawing correlation between these researched concepts and the higher education institution taken as sample in this paper.

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For the purpose of the research, the words ‘educator’ and ‘teacher’ are used interchangeably, and, even though they are different, at certain points it is believed better to refer to a teacher as an educator, because a teacher will impart teaching, but an educator will impart information and skill, which then does not only result in knowledge, but in applicable knowledge. Essentially, with this method we are trying to convert a teacher into an educator and an educator into a teacher, or blend the two to make one successful entity that will enable a business student to solve their future business issues and answer any kind of business question with knowledge and good practice. To make informed decisions based on research and discussion with peers, and colleagues, later in their professional career, students *‘will hone both their problem-solving and their ability to think and reason clearly’* (Hammond, 2002).

## **Literature review**

The history of the learner-centered environment, takes us back to 4<sup>th</sup> century B.C., and the Socratic method of teaching:

*“...it involves a style of question-oriented dialogue where the teacher takes a role that appears to be almost subservient to the student. The teacher in a Socratic dialogue essentially denies his or her own knowledge of a subject in order to lead the student to the correct idea or answer”* (Room 214 Team, revised 2018).

The question is, if this method was only suited and in accordance with the blend of disciplines (mathematics, science, the humanities) in ancient times, or it could be adapted to the modern classroom where all disciplines have their area of functioning. The findings of focused research have demonstrated that Socratic teaching and learning is best suited to the humanities. Additional research states that *‘the Socratic method brings in itself an urge awakening in the students to bring down old ideas and ‘truths’ and replace them with new ones’* (Room 2014, revised 2018). Thus, instead of thinking about how to apply what they know, they are thinking about and questioning the knowledge as a concept that is now more tactile than ever. The prerequisite is that the educator nurtures a participant-centered (PCL) classroom and incorporates the case method of teaching and the case as a teaching tool. Students are encouraged to question petrified truths with ideas that are truly philosophically sound. The issue that bridges the great gap in centuries and unites our contemporary case method of teaching to the one of Socrates is the necessity of previous teacher preparation, to avoid ending up with an immense number of disconnected answers to simple questions. Thus, the teacher preparation or the TN suggests a particular type of questions designed to aid the aims and objectives of a lesson. Sadly, records do not recount how he dealt with this issue, but this research stresses the importance of a carefully tailored set of questions (from open-ended to derivative and guiding), to reach the lesson aim and objectives closely connected to the didactic facet of the curriculum.

Socrates is important to instructors and case writers in modern times because he challenged everyone without exception (Bunin et al. 2003). The method bore the Greek name *elenchos*<sup>3</sup>, and it *‘occurs outside philosophical contexts and means testing’* or *‘examination’*.

### **Research supporting the case method as a tool**

The greatest challenge when teaching with the case method is to bring participants to a level that enables them to benefit from a case class. Students have to understand that, just like in reality, during their time spent in the classroom they represent diverse stakeholders.

*“Students ... must be prepared to forget what they know and get ready for the unexpected – just as they will be challenged in their future professional lives”* (Wirtz & Simmons, 2018).

Some authors speculate that *‘listening to other colleagues, senior colleagues’ war stories might help a junior instructor just entering the shallow end of the sea of cases to delve into this method of teaching, but also warns against choosing the wrong case for a group of students’* (Peshkam & Simmons, 2018). Thus, every instructor is responsible for choosing the best case for their group, and be well-equipped for the *‘unplanned-for questions’* (Justo & Simmons, 2018). The trial-and-error approach, meaning that *‘the key is getting into a classroom as soon as possible’* is recommended (Ronnie & Simmons 2018). Students are given ‘a script’, but an incomplete one, they are asked to deconstruct it from a director’s viewpoint, learn about the characters from the lines of the other characters and they have to improvise the ending. They will role play, SWOT analyse their characters and try as much as they possibly can to make them come alive to be able to understand them. They accept what is given to them and continue to the development of the problem.

An instructor also needs someone for guidance as a future educator into changing the values, assumptions, beliefs and expectations (VABE) on teaching and learning (Clawson, 2018). Educators also need to learn more about cases and the case teaching method in a more protected environment. The best way suggested is a case method workshop, seminars, webinars and experiences. This research consults webinars held by Marc Robinson on the importance of writing up your experiences as a business professional and presenting them in the classroom environment as material you would be most familiar with, but also from the RESITA Network<sup>4</sup> workshop in 2013, visited by two of the authors of this paper.

The Case Study Handbook (Ellet, 2007) aids educators successfully deliver the case study problems to their students. The heuristic<sup>5</sup> method of teaching is explained, by proposing that it is the

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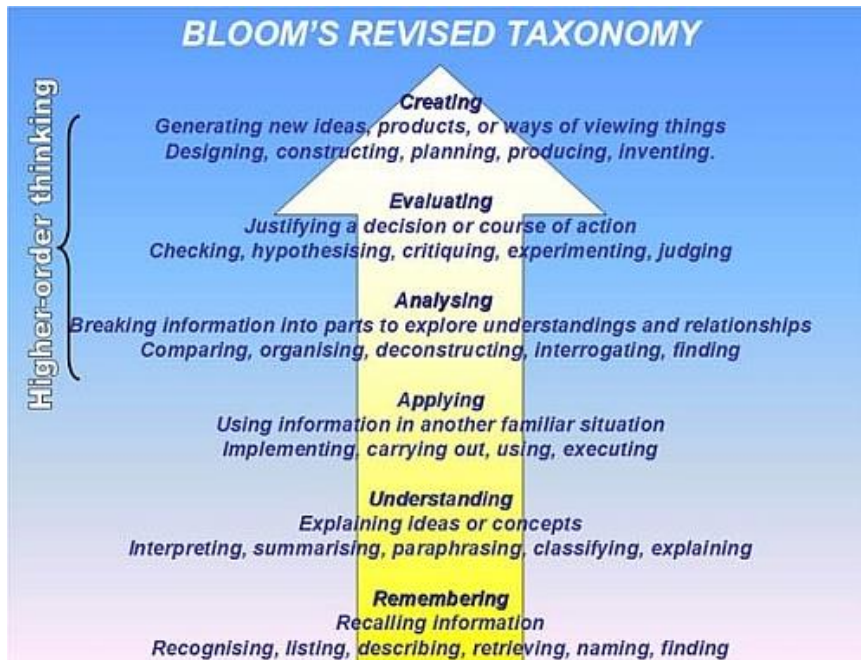
thinking, not the reading that is key. Following the logic of a case where there is no one right answer, we propose a different time frame later on. *'A case is a text that refuses to explain itself'* (Ellet, 2007) and it needs to include a significant and relevant business issue, significant information for conclusions and has to refrain from stating any conclusions. If any of these three components are missing, a case will not have an educational value. Ellet also addresses a key issue of responsibility that students feel during this PCL time of instruction. They are aware that it is just a lesson and they do not bear the responsibility for making a decision. A skillful case writer and a well prepared educator will help them own up to their previous knowledge to make present, informed decisions and become responsible for the outcomes of the discussion.

A group of authors (Garvin *et al.* 1992) has prepared a compilation of essays from the HBSP, which describe the building blocks of successful group leadership like: negotiating a “contract”, governing the conduct of a group, orchestrating a successful process of questioning, listening and responding, and encouraging independent thinking.

The original teaching and learning taxonomy (Bloom, 1956) explains the cognitive processes, through appropriate action verbs, by which a learner would move from cognition to meta-cognition. For the purpose of the active learning, we refer to Bloom’s revised Taxonomy (Figure 1). A business leader who has the ability to impart knowledge and spur motivation is a leader who has realised the *'link between the old-fashioned leadership'* and the current motivational consideration dimension style (Anderson *et al.*, 2001).

**Figure 1:**

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Source: Retrieved from: <https://faculty.chass.ncsu.edu/slatta/hi216/learning/bloom.htm>

In retrospect, a participant-centered environment employs the use of the case as a tool, the case method as a teaching method to impart knowledge, skill, spur motivation and allow space for practice, and driven by the desire of self-knowledge, self-realisation, eventually owning up to the knowledge in a meta-cognitive sense. This revised taxonomy is fully applicable to this teaching model and has proven successful.

The conclusion in this paper shows a very evident link between the MBA programs where future leaders are shaped to help them turn towards the *'delegation-of-power'* leading style, a type of leadership that is viewed as *consideration dimension*, as opposed to the *initiating structure dimension*, that is already put into force by the practice of Macedonian business leaders (Bojadziev et al., 2015).

### Researchers opposing the case method as a tool

Shugan (2006) strongly rejects this teaching tool and disagrees with the case method, and sees an *'alarming disconnect between classroom learning and academic research'*. The students, according to him, *'leave the classroom with a false sense of confidence about what they know'*. He appeals to instructors to use the case without the method. Marc Robinson from the WDI agrees with Shugan that the case method has its drawbacks, as the case itself could be viewed as too specific; *post hoc*<sup>6</sup> it gives an experience to the learner that is somehow unfinished. Consequently, that very fact reduces the ability of the students to think critically on a given topic, but binds them to mere perception, which is not thinking.

Having already mentioned Marc Robinson, WDI previously, we are putting him on the discussion map, between the authors advocating for and the ones against the larger scale of incorporating cases in education.

Jerry Kirkpatrick (1987) supports his notion that a truth does not need to have a special rapport with facts as experiences. He too is trotting a thin line between supporting and refuting the case method of teaching. In the case study, the data is not even factual, and what matters, according to his deductions, is only the resolution of a problem which is relative to all participants. He views the case teaching method as progressive education, and then discerns its properties by saying that it is anti-conceptual.

### **Research methodology**

The survey was conducted at UACS, School of Business, Economics and Management, in the form of a questionnaire, with multiple choice answers, designed by the authors of the paper. The questionnaire essentially asks them to provide proof that learning was happening in their lessons and that it resulted in fruitful discussions and proposed solutions by their students.

In continuation, we are displaying the results from the survey, presented in 5 tables and figures and also numerical responses. Each question is elaborated after the representation of the results.

**Table 1. Answers to question 1: Did you provide your students with the case before the lesson?**

	<b>Yes, a couple of days/a week before the lesson.</b>	<b>No, they received the case immediately before the lesson.</b>
<b>All data</b>	73%	27%

The greater number of educators handing out the case beforehand, we can conclude, would expect their students to spend time preparing. The tendency to give students time for individual active reading accentuated the outcomes listed in the Characteristics of Effective Case Teaching (2005). The objectives state that provided students have the case beforehand, in-class learning will substantially exceed pre-class preparation. Due to the fact that there is substantial learning during the lesson, the result ensuing is a stimulus for after-class learning, closing the learning process as a full circle.

**Table 2. Answers to question 2: Do you take into account the different learning intelligence types and different learning styles of students when choosing the case and making a lesson plan, or do you come across problems concerning the reception of material when using the case method of teaching?**

	<b>Yes, I do. I change my lesson plan according to the learning styles of the group.</b>	<b>No, I find that a uniform shape works for the entire student body.</b>
<b>All Data</b>	73 %	27 %

The answers to this question support and follow the idea of a PCL, enriched with one of the most universal theories about learning styles, Dr. Howard Gardner’s verbal-linguistic, logic-mathematical, spatial, kinesthetic, interpersonal, intrapersonal and naturalistic, creating a convenient way for educators to easily determine the prevailing learning style of a larger group, and possibly offer a few more options for the students practicing a different learning style than the larger portion of the group, thus an instructor will offer options (discussion, visual multimedia aids, realia, role plays, additional reading or preparation for writing response, essays). Having reached their discussion destination, they conclude with a wrap up of the whole discussion and a board plan, particularly aimed at the visual learners (Fleming, 2006). This string of integral parts of a case-based lesson is associated with the plan for writing TN devised by HBC writers, and from the responses to this particular question, we conclude that educators make sure that students always see the academic benefit of the lessons. The results go in favour of the discussion advocating for active learning with full retention, as the ‘dialogue’ led during lesson time between teachers and students is prepared according to the interlocutor, with their needs in the forefront. This draws attention to the most important part of teaching, the approaches to learning, catering to students’ different types of learning intelligence, and the awareness of the educator in order to impart knowledge successfully (Trajanoska, 2016). It is not just about educators doing their job; it is about doing their job right, in a way that would provoke feedback, whether positive or negative. At that point, an educator can be sure that they have stimulated discussion and that learners can start tapping into the more advanced stages of learning, according to the pyramid of adult learning and Bloom’s learning taxonomy, where they become aware and own up to cognition and meta-cognition.

**Table 3. Answers to question 3: How often do you use the case method and cases as tools in your curriculum?**

	<b>I base almost my entire yearly teaching plan on teaching through the case method.</b>	<b>Very rarely, I find research and instructor-based teaching is more functional for my students and myself as an educator.</b>
<b>All Data</b>	82%	18%



These answers support the main goal of the research, to represent this innovative teaching method and the case as a tool, together with the teaching notes. This method is proposed for use as often as possible in Business Communication schools on all levels, in order to become a part of the worldwide tendencies of active learning. Educators will produce cases, and students will consequently devour them in lesson.

**Table 4. Answers to question 4: Have you managed to identify a difference between perceived knowledge and actual knowledge imparted and retained when teaching with this particular method?**

	<b>Yes</b>	<b>No</b>
<b>All Data</b>	80%	20%

Results of this research, literature data (Shugan, 2006), supported by the experiences of UACS business teachers, provoke a greater initial reaction in the form of students' face validity, their participation and discussion in the PCL classroom, and evidence of retained subject matter. Knowledge in general is far superior than it is in the situation when teachers resort to the traditional method of teaching. They do not propose a complete abandoning of the traditional method, as active learning is a process that begins passively. Both educators and learners need to slowly work their way from the passive to an active classroom. The case method and the teaching tool need to be introduced slowly and carefully to reach optimal efficiency.

**Table 5. Answers to question 5: As an instructor, have you ever been uncertain as to how a case should be taught and used in lessons and, if in doubt, do you ever improvise?**

	<b>Uncertain, and I stick to the instructions</b>	<b>Uncertain, and I improvise for better results</b>	<b>Certain, and I improvise for better results</b>	<b>Certain, and I stick to the instructions</b>
<b>All Data</b>	20%	20%	30%	30%

According to the results, we can draw up a trend among the answers and the behaviour of educators to impart knowledge better. A greater number of instructors answered that they are certain in their use of the TN. An instructor's certainty of how to structure their lesson is important. The uncertain answers show that even uncertainty does not impede an instructor from taking steps towards creating a safe zone for preparation and avoiding any in-class risks entailing from uncertainty (Andersen, Espen & Schiano, 2014)

The most striking answer is that even in the case of certainty; educators will improvise, using sources and active learning material in order to improve the character of the lesson. Teaching and imparting knowledge is a two-way street, and the importance of teaching and checking students' knowledge is as crucial as students' evaluation of the teacher. Self-checking is a valuable practice of a professional's working habits.

To conclude, it is an instructors' right to use the TN given with a certain case, or try to improve and make their teaching more personal.

It is very important, that from a teachers' viewpoint, the case method allows educators to be creative and devise their own plans and ideas of what the lesson and tool plus additional notes will look like (Anderson & Krathwohl, 2001).

## **Conclusions and recommendations**

The research makes an introduction to the method of teaching and learning, but also practicing business discussions and decisions through case study followed by an examination of the success and failure stories with this teaching method. It assesses the tendency of using ready-made cases written according to the recommendations of the HBS, and compares them to the situation of an instructor as a writer, drawing from their own knowledge and experience, to prompt them into writing their own cases for a specific purpose or specific class or group of learners. Thus, after-lesson assessment is performed to inspect whether the theoretical side of the lesson is fulfilled and, simply, whether learning happened. Almost all of the instructors completing the survey at UACS, paralleled to instructors from Europe and the United States (information derived from available literature and various sources), claim that they can fully depend on the case method to complement the traditional lesson, taking up almost equally the amount of time needed and dedicated to that subject in comparison to the traditional method, and they support this notion by way of proof in the form of students' face validity and the fact that almost all of their lectures do not finish when they leave the room. The discussion continues in front of the door, to the instructors' great satisfaction.

In general, the paper answers pressing questions connected to the success of the method using the tool as a good type of practice supporting contemporary tendencies of active learning, where students take responsibility of their individual processes of learning and own up to the knowledge, thus value it more

than simply being handed facts. It is a delicate issue in learner psychology that retention is far greater when students come to the conclusions by themselves, and they can point to the way they arrived at said conclusions (Ambrose, 2010). It represents a successful process during lesson time for both students and teachers, and one that expands beyond the lesson, before and long after, resulting in retained facts and knowledge, usable at any point in their future careers.

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