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## Case Learning: *How It Works, Why It's Effective*

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Teaching note prepared by Steve Freeman\*  
University of Pennsylvania Center for Organizational Dynamics,  
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Case discussion helps you improve your skill in analyzing and dealing with ambiguous situations and incomplete information. With practice, you begin to approach problems in a focused, confident way that leads to firm, well-reasoned conclusions even in the face of uncertainty. As well as developing knowledge and understanding, the process fosters good judgment and effective action.

The power of the case method lies in active participation. In learning from a case, you must try to determine the relevant facts, analyze them, and draw conclusions about the cause of the problem and what action to take. Cases usually yield multiple conclusions, each with different implications for action. Your conclusions often differ from both the protagonist's thinking and the case writer's own implicit diagnosis, although all are based on the same facts.

In case learning, you encounter the problem before you create the structure to solve it; the method is inductive and experiential. The problems that cases present are subtle, complex, and persistent; they have no easy, definite, or correct solutions. In confronting such problems, you face the challenge of working out your own approach to defining, analyzing, and solving them. The experience should be that of having the problem oneself and striving to find a way to resolve it. Much of the power of a case derives from adopting an action perspective rather than analysis from a distance.

At the same time that it develops reasoning skills, exposure to the ambiguous and complex problems found in cases helps build the confidence that leadership demands. Case learning develops tolerance for ambiguity and fosters the ability to make timely decisions and take effective action despite incomplete information, unclear problems, and uncertain consequences. During case discussions, I encourage you to face these risks and move toward specific action. Through such practice, you learn to cope with the uncertainties that challenge managers and leaders.

### How to Prepare a Case

There is no one right way to prepare a case study for class discussion. Raymond Corey of the Harvard Business School recommends the following approach:

1. Go through the case almost as fast as you can turn the pages, asking yourself, "What broadly is the case about and what types of information am I being given to analyze?"
2. Read the case very carefully, underlining key facts as you go. Try to put yourself in the position of **the protagonist** and to develop a sense of involvement in his or her problems.

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\* Adapted from *Use of Cases in Management Education* by E. Raymond Corey of the Harvard Business School; *Questions and Answers about Case Learning* by Prof. Thomas V. Bonoma of HBS; and *Questions and Answers about Case Learning* (same title) by Thomas Angelo and John Boehrer of the Harvard Kennedy School of Government

3. Define what **you** believe to be the basis issues
4. Identify the relevant areas for analysis, noting each on a separate piece of paper
5. Go back through the case, noting relevant facts on your work sheets.
6. Study the information, weighing the qualitative and quantitative evidence carefully. Note your conclusions for each analytical area.
7. Review your conclusions, and then formulate a set of recommendations supported by analysis of case data and any additional information you gathered.

Step #2 – understanding the problem – is especially critical. Sometimes there are several sub-issues and an overriding issue; other times there are hard-to-reconcile conflicts. Good problem definition requires that you:

- Name the immediate issues, and define them in a way that permits resolution of the issue
- Put them in a broader context: What is the cause – and consequences – of an action?
- Deal with a problem from the perspective of the protagonist, recognizing his or her responsibilities and scope of authority, as well as the limitations associated with that position

## **Discussion Groups and In Class Interactions**

Much of the power of case learning comes from study group and class interactions, which provide you with the valuable opportunity to learn from each other's as well as your own experiences. Note your colleagues' analytic and problem-solving approaches, and use this exposure to recognize and reflect on your own. The incorporation of many points of view into the case discussion fosters the fundamental strength of generating alternative responses to problems. The mere fact of the interaction enhances such skills as listening, articulating, and participating effectively in groups.

The classroom is a place for you to express, support, and defend your conclusions and recommendations. We learn through controversy and discussion. Through constructive controversy, we build analytical skills, develop judgment and gain conceptual understanding. In this, you are responsible for not only your own education, but that of your classmates as well.

Class discussion promotes rigorous thinking and develops communication skills. As important as participating is, however, listening is yet more important. It's easy to become so preoccupied with what we think that we become closed to the thoughts of others.

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Case interactions challenge you to adopt an action perspective, experience the raw data of a problem, and determine your own means of coping with it. In doing so, cases involve the whole person, the emotions, intuitions, sensitivity to others, as well as pure analytical intellect. Such qualities as persistence, patience, and persuasiveness count, along with mental agility and power, just as they do in the real lives of professionals. Our goal in case learning is to educate the professional person, not just the mind.