How to Learn with Cases

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How to Learn with Cases is a guide about the process of learning with cases. It stems from key ideas covered in Learning with Cases, Teaching with Cases and Writing Cases but adds a new tool, the Case Analysis Record or CAR. Faithfully repeating a three stage learning process of Individual Preparation, Small Group Discussion and Large Group Discussion as well as using the CAR throughout will enable students to learn with cases quickly and effectively. This guide will help students maximize their learning with cases within a reasonable amount of time. It has two objectives - to help students learn better and faster with cases.

Target Audience

- Students taking courses using cases
- Instructors using cases in their courses

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HOW TO LEARN WITH CASES

This guide helps you maximize your learning with cases within a reasonable amount of time. Faithfully repeating a three stage learning process of Individual Preparation, Small Group Discussion and Large Group Discussion as well as using the Case Analysis Record (CAR) throughout will enable you to learn quickly and effectively.

What Is A Case?

A case is a description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person (or persons) in an organization. A case allows you to step figuratively into the position of a particular decision maker. Cases describe real situations with the actual data available to the decision maker at the time of the case. Cases are released only after the organization where the decision maker works has given permission to use the case for educational purposes and confirmed that the information is correct. Some case information, such as names of the organization and people, may be changed to assure confidentiality. Cases are the product of a carefully thought-out process. The content varies with the educational purpose of the case. A large part of the case remains unwritten, but implied by the date and location. You are expected to bring your own context understanding and experience to bear on each case.

Why Are Cases Used?

Cases are a form of on-the-job training with little corporate and personal risk involved. Moreover, cases show how work is planned and organized in various settings, how systems operate and how organizations compete. Cases allow you to test the understanding of theory, to connect theory with application, and to develop theoretical insights.

Managers seldom have access to all the information pertinent to decisions. Likewise, cases seldom contain all the information you would like. Thus cases force you to make decisions with available information, thereby helping you to use your judgment and learn to manage ambiguity.

Because of the discussion-based format of the case method, cases are an excellent vehicle for developing your self-confidence and your ability to think independently and work cooperatively. Moreover, cases foster the development of insights into your own strengths and weaknesses and allow for profound personal growth. Learning with cases develops a wide range of valuable life skills, such as analytical, decision making, communication, time management, interpersonal, and creative skills.

The Three Stage Learning Process

Your learning is far more fulfilling if you are convinced that what and how you are learning makes sense. This starts with a thorough understanding of the three stage learning process: Individual Preparation, Small Group Discussion, and Large Group or Class Discussion, Figure 1. Each of these three stages is vital to effective learning and each contributes in different ways to maximizing the quantity and quality of learning. Figure 1 shows how the three stages contribute in a progressive and cumulative fashion. Participants in a case learning experience are always constrained by time. It takes time to read, analyze, and discuss each case. Your goal is to learn quickly and thoroughly by engaging in this process repetitively.

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This note stems from key ideas in the authors' text, *Learning with Cases*, www.casemethodbooks.com

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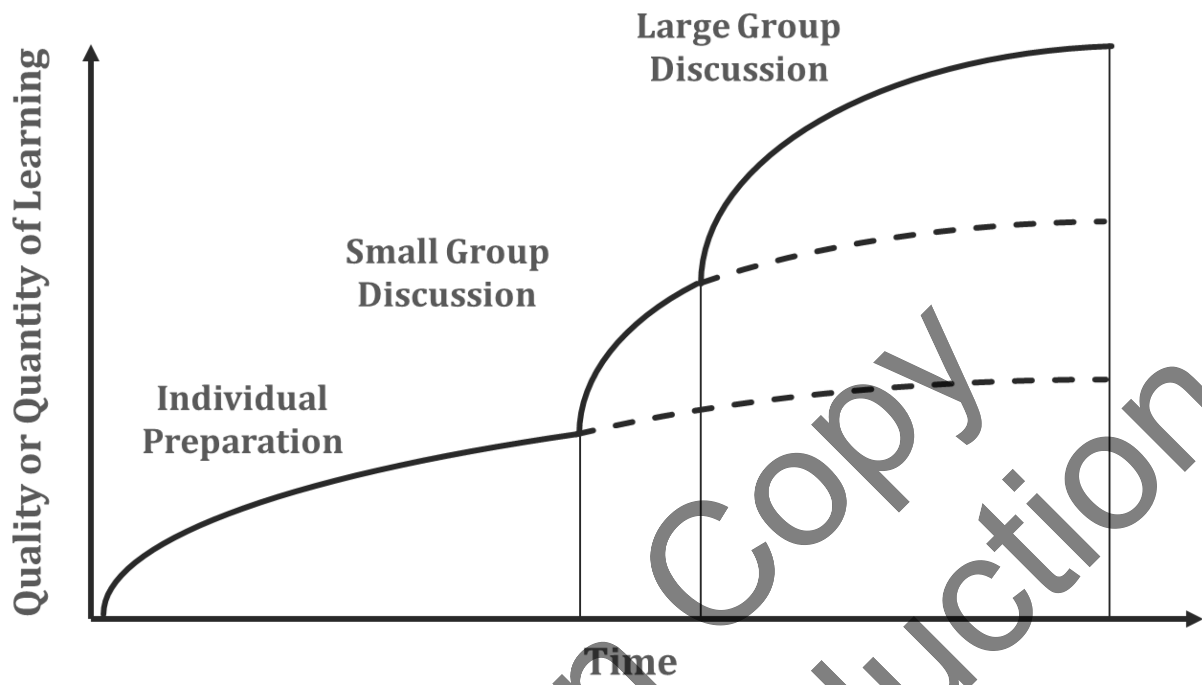
Figure 1: The Three Stage Learning Process



Stage 1 - Individual Preparation

Sound individual preparation is the foundation of learning with cases and is the essential prerequisite for subsequent small and large group learning. Individual preparation is composed of three parts: Individual Case Size-Up, Reading the Case, and Case Analysis and Decision.

Case Assignments

Prior to class you will usually receive an assignment prior to class which consists of a case to prepare and, possibly, other materials to read and understand. The standard assignment question: "If you were in the decision maker's position in this organization, what would be your analysis of the situation described, and what decision or action would you take and why?" Case instructors use this standard type of assignment in a large variety of cases. If no assignment questions are provided, you can assume this question was intended.

You are expected to take the role of the focal person in the case. Imagine the person currently in that role has suddenly left the organization and you have been asked to take his or her place. You bring your own values, age, gender, background, theoretical and practical understanding, training, expertise and culture into the position. The task facing the decision maker has now become yours. The background to the organization and the issue remain as identified in the case, but the task is yours.

Other types of assignments can also be given. Normally, these address specific course related concepts. Examples might be: "Please do a consumer analysis. Create an organization chart. Prepare pro forma financial statements. Draw a process flow diagram." All are attempts by the instructor of the course to reinforce the value of certain tools or techniques or specific analyses. You should carry out such assigned tasks as requested.

The Initial Case Size-Up

Most students new to learning with cases find the process overwhelming. They often start reading and re-reading the case. Students tend to focus on irrelevant information or get lost in the details. Time slips away, frustration is overtaken by anxiety. Instead, the way to start is with the Initial Case Size-Up which should take five to ten minutes, regardless of the length or complexity of the case.

The Initial Case Size-Up has five steps:

Step 1. Read the opening and concluding paragraphs.

Step 2. Turn to the exhibits, normally located at the end of the case, if there are any; read the titles and quickly survey the contents for initial impressions.

Step 3. Review the headings as they appear in the body of the case for initial impressions. Case information is normally organized under several headings ranging from the general to the more specific.

Step 4. Read the assignment questions, if provided by your instructor, for special directions and reflect about how to approach the case.

Step 5. Answer for yourself the following six questions:

> **Who** is the decision maker in the case that I am replacing and what position do I hold?
>
> **What** appears to be my issue (decision, problem, challenge or opportunity) and what is its significance for the organization?
>
> **Why** has my issue arisen and why am I involved now?
>
> **When** does the case take place?
>
> **Where** is the organization located? Does the location have any relevance to the issue?
>
> **How** long does the decision maker have to make this decision?

At the end of this Initial Case Size-Up, you should have a solid perspective and sense of direction to pursue a more detailed analysis of the case. Take a moment and write down your responses to the questions in Step 5 in the top of the Case Analysis Record (CAR), Figure 2.

The Case Analysis Record (CAR)

The Case Analysis Record (CAR) assists you in your analysis and note taking as well as contributing in the small and large group sessions. It identifies the key topics you need to record and their sequence. We suggest you make a number of hard copies or download a copy from the online resources (www.casemethodbooks.com). You cannot learn with cases without making good notes; memory is not enough. The CAR is essential.

Reading the Case

Armed with a solid initial perspective and focus, you now do a thoughtful reading of the case. Highlight key information and make notes in the margin or elsewhere to summarize ideas, raise questions, list particular concepts and record observations as they come to your mind.

Cases contain both facts and opinions. While you have to take facts at face value, you can certainly question opinions while paying attention to their source.

Reading a case is different from most other reading of academic material where memorization is expected. After the large group discussion of the case is over, the details just discussed in class are no longer important. Throughout each stage of the three stage learning process, the physical copy of the case is immediately available. Thus, the reader of the case only needs to know where to find the relevant information, not to memorize it. The real value-added is not in the reading of the case but in the thinking afterwards. Most cases are organized as follows:

The Opening Paragraph

The opening paragraph provides a lens to the case, identifying the name and location of the organization, who the decision maker is, what the decision or issue is and when the situation takes place and where.

Figure 2: Case Analysis Record (CAR) – Available at www.casemethodbooks.com

Case: _________________________ Name: _____________________ Date: ______________

Who:
What:
Where: When:
Why:
How (much time):
Importance: H M L
Urgency: H M L

Analyse the Case Data (apply course related theories, concepts and tools) including Cause and Effect:

Constraints: Opportunities:

Alternatives:	Criterion 1: __%	Criterion 2: __%	Criterion 3: __%	Criterion 4: __%
A.				
B.				
C.				
D.				

Decision:

Action and Implementation Plan:

Activity	Start Date	Time to Complete	Cost to Complete	Resources (People)

Missing Information: Assumptions:

After Class Reflection:
1.
2.
3.

Organization Background Section

The next section of the case normally deals with the background of the organization and, possibly, the industry, providing the context for the issue. This information can be voluminous, but not necessarily all relevant to the decision or issue, and can be read quickly

The Specific Area of Interest

A description of the specific area or function in the organization in which the decision maker is employed and his or her responsibilities typically follows. More information is also normally provided about the decision maker's position, job authority and responsibilities. This is still background and can also be read quickly.

The Specific Problem or Decision and Possible Alternatives

After all this contextual information the case next describes the issue. Now slow down in your reading because these details become the most important and relevant information you will have to deal with. If alternatives are provided in the case they tend to come next. These again require careful reading.

The Concluding Paragraph

The case will often contain a concluding paragraph reinforcing the time limit to which the person is working and restating the task.

Exhibits

Many cases contain exhibits after the text portion of the case. Turn to the exhibits as they are referenced in the text to understand their context and content. Scrutinize them thoroughly. Some exhibits, such as financial statements or organization charts, may appear fairly standard. Still look for anything odd or unusual about them. Other exhibits are unique to the case and provide a summary or illustration of key data. Make sure that you understand the purpose of each exhibit.

Just a reminder: only read each case once.

Case Analysis and Decision

A generic approach to case analysis includes the following steps: A) define the issue; B) analyze the case data with focus on causes and effects as well as constraints and opportunities (both internal and external); C) generate alternatives; D) select decision criteria; E) assess alternatives; F) select the preferred alternative; and G) develop an action and implementation plan. Your CAR contains this analysis outline. Some parts of this model will not apply to every case and some aspects will receive more emphasis than others at different times during the course.

Specific analytical approaches, techniques and tools may be applied depending on the course, type of case and your instructor's particular requirements. It is appropriate to revisit regularly any particular analytical model, framework or concept suggested by your instructor or outlined in the course syllabus.

Step A. Define the Issue

Your initial job in case analysis is to develop a clear and comprehensive statement of the issue(s) involved in the case. The key concern(s), problem(s), decision(s), challenge(s) or opportunity(ies) you are facing as main actor of the case needs to be clearly identified.

Importance and Urgency. One of the first judgments you need to make about the case issue is whether this issue is of strategic importance to the organization or not. Could it make or break the organization? Could it be a source of major competitive advantage? On your CAR mark the importance as high, medium or low. You will also need to develop a feeling for the sense of urgency. How much time do I have to address the issue(s)? Can a decision wait while we collect more information or is time of the essence? On your CAR mark the urgency as high, medium or low.

The combination of importance and urgency places the case issue on a priority list and will affect the criteria for decision making, the resources that should be used, including the amount of money that can be spent, and the options which may be considered to resolve it. That is why putting the issue in context early is vital to effective case analysis.

Step B. Analyze the Case Data

Proper analysis is vital before alternatives and decision criteria can be assessed. Your instructor will identify the major analytical and theoretical approaches related to the course. When analyzing a case you are expected to demonstrate your understanding of the field by the appropriate application of course related theories, concepts and tools to the specific decision in the case.

Quantitative and Qualitative Analysis. Almost every case has quantitative as well as qualitative dimensions. Frequently, students prefer the qualitative over the quantitative. Please try to avoid this inclination. Push the numbers, play with the numbers and you may get a much better feel for the whole situation. One has to be careful however not to get lost in detailed numerical analysis with little reflection about what these numbers actually mean. Figuring out which calculations to do is challenging for most students. Before beginning any calculations be sure that you have a clear understanding of what you hope to learn from these computations. You will also want to record your calculations so that you can both explain your logic and make any corrections that are required. Think carefully about your units of measure and be sure to document these in your calculations. Finally, consider how you might visualize your calculations; drawing a graph can help with the interpretation.

Causes. Problems cannot be solved unless their causes have been identified. Working backwards by asking "why" helps identify causes and may lead to valuable insights.

Constraints and Opportunities. You should also identify constraints or opportunities which will impact on your analysis and ultimately on your recommendations. Constraints and opportunities are not always explicit in the case, although they may be implied by the context. Consider the key resources of an organization to be money, people, materials, equipment, facilities and the management system. Each of these resources or a combination of them can be a constraint or an opportunity.

In your analysis of the case remember to focus on the implications rather than simply the case facts. Duplicating information provided in the case is not value-added.

Step C. Generate Alternatives

Generating alternatives deals with developing a number of different ways to address the issue(s) of the case. This is an opportunity to be creative. Record your alternatives on your CAR.

Step D. Select Decision Criteria

Before choosing one or a combination of your alternatives you need to define the decision criteria which will provide the basis for evaluation. Decision criteria can be classified as quantitative or qualitative. They should fit with your analysis of the organization and the constraints that you analyzed. Table 1 gives a list of frequently used criteria. It is not exhaustive and, under certain circumstances, items listed under the left hand column might well move to the right and vice versa.

Table 1: List of Common Decision Criteria

QUANTITATIVE CRITERIA		QUALITATIVE CRITERIA	
Profit	Risk	competitive advantage	ethics
Cost	cash flow	customer satisfaction	flexibility
return on investment	productivity	employee morale	safety
market share	employee turnover	corporate image	employee engagement
capacity	quality	ease of implementation	goodwill
delivery time	environmental impact	social impact	aesthetics

In your selection of the most appropriate criteria for each case, you should be guided by your analysis and what you believe are the objectives or strategy of the organization and its culture. Record your criteria on your CAR.

Step E. Assess Alternatives

You need to compare and contrast each of your alternatives against the criteria you have selected. To help your assessment and comparison of alternatives, you may wish to use a matrix such as the example provided in Table 2. Even if you do not have precise data to fill in the matrix, it is still advisable to use a ranking system.

Table 2: Alternative Assessment Matrix

ALTERNATIVES	DECISION CRITERIA			
	Cost (Annual) 40%	Quality (Defect Rate) 20%	Ease of Implementation 20%	Customer Satisfaction 20%
1. Make Own	$ 580,000	3.5 %	Difficult	Medium
2. Supplier A	$520,000	2.5 %	Easy	Low
3. Supplier B	$460,000	4.0 %	Easy	Low
4. Joint Venture	$ 560,000	2.0 %	Very Difficult	High

Whenever multiple decision criteria need to be applied, the weighting of each criterion versus the others has to be decided. In the example above we have given cost a 40% weighting and each of the others 20%. Someone else might put customer satisfaction as the highest rating and, as a result, end up preferring another alternative.

Short versus Long Term. In almost every case, both short and long term considerations are relevant. Which is preferable: (1) An alternative that has quick highly beneficial results and mediocre long term ones or (2) an alternative with good long term prospects but no immediate pay-offs? What actions need to be taken in the short term and what additional ones in the long term? It is the continuing exercise of judgment based on the case situation and your experience that makes case learning such a unique endeavor.

Predicting Outcomes. Most cases deal with situations or decisions involving a change in the organization. For example, the case may deal with an investment proposal. Is it worthwhile to invest money in this proposal? Clearly, the future benefits expected from the investment have to justify spending the money now. Prediction of future results and consequences of any change is a fundamental step in alternative assessment.

Step F. Make a Decision

The ultimate point in case analysis is to make a decision. If you have done a good job at predicting outcomes and comparing alternatives, the decision may be obvious. There is rarely only one sensible solution to a case. It is your analysis and your justification for adopting a certain alternative that count. Be sure to record your decision on the CAR.

Step G. Develop Action and Implementation Plan

After making a decision you must now develop an action and implementation plan. Even though this step of the case solving model is crucial, it often gets neglected. Record your action plan on your CAR and answer five basic questions: what activities are required (in order), what is the start date for each activity, how long will each activity take, what are the costs, and what resources or people are required?

Missing Information and Assumptions

Your analysis should be based on the information available in the case. You can use your own background and experience to provide the political, economical, social, and technological context of the case. However, you may feel that you do not have enough information to assess the situation confidently. Routinely, managers are forced to make decisions based on partial information and make assumptions. Making assumptions can be a delicate matter. Your assumptions should be plausible, realistic, and helpful in the light of the circumstances of the case.

If you think you need more information, be prepared to answer the following questions: What information do I really need to have? Why do I think it is critical to have this information? Where do I think this information is located? Who has it? How much time and money will it take to produce it? If provided, what difference will it make to my decision? Enter your missing information on your CAR which should now be ready for the Small Group Discussion.

Stage 2 – Small Group Discussion

The small group discussion, the second step of the three stage case learning process, provides the key link between individual preparation and large group (or class) discussion. Yet, curiously, it is the one step most frequently left out because many educators and students do not recognize the contribution of this step to the whole learning process. Small groups, which may also be referred to as study groups, learning teams, or break-out groups, give every member an opportunity to discuss his or her insights to the case. Unless you have had the chance to talk about the case, your understanding of it has not been tested. The small group discussion forms a vital part of your preparation task. Collective effort will surpass individual preparation. The purpose of the small group is not to duplicate your individual preparation or class discussion but to provide an opportunity to increase your performance, to push you up to a higher level of learning.

Small group time should be short and effective. The purpose is not to "solve" the case. The placing of the small group activity right between individual preparation and class recognizes that more learning will follow. However, the art is to push the learning as far as possible within the time available so that the large group discussion can start at a higher level.

Organizing For Effective Small Group Work

Most institutions rarely force students to work in small groups and few provide mechanisms to organize them formally. You are often left largely on your own for this task. Whether or not your institution promotes or facilitates regular small group work, we invite you to take the initiative and assume the responsibility to form your own group.

Size: To maximize the benefits of a small group, your group should have a minimum of three and a maximum of five members. Larger than five, the opportunity for individual members to participate and contribute to the group diminishes, with a resulting loss of productivity for the group and satisfaction for each member.

Composition: Considerable attention should be devoted to the composition of your group. Basing your group selection strictly on past friendships or geographic considerations could be quite limiting. Ideally, your group should reflect a variety of skills, cultures, experiences and expertise. Your discussion will be enriched by the variety of perspectives from members with diverse backgrounds. A balance of quantitatively and qualitatively oriented people is bound to increase the overall learning in the group discussions.

Time: Twenty to thirty minutes per case will normally be sufficient, assuming a group of three to five persons and solid individual preparation prior to the small group discussion. It is essential that you keep reminding yourself that the small group is not a crutch for poor individual preparation, but a tool to achieve a higher level of learning. Some students combine their small group discussions, that is, they discuss more than one case in one sitting. This practice, of course, requires a fair amount of planning but is worth the effort.

Timing: Find a time for your meetings that makes it as convenient as possible for everyone to get together. Ideally, the small group discussion should take place close enough to the large group discussion that the acquired learning remains fresh in your memory but not so close as to prevent you from reflecting and pondering how you will translate your added learning into class contribution.

Location: Some students meet at home; others at school. Some rotate the place where they meet. Many institutions provide small rooms which may be booked ahead of time. Some small groups make use of technology to meet virtually. This medium can limit the non-verbal aspects of communication, but at least forces you to be disciplined in your use of time.

Small Group Guidelines

Every small group develops its own rules of conduct, standards of participation, and expectations of how members should behave. To increase discussion process effectiveness, we suggest you adopt the following seven guidelines for standard day-to-day case preparation.

1. Each participant must have completed the individual preparation stage as well as possible.
2. Each member of the group must participate actively in the small group discussion. Each member agrees to share his or her key ideas and insights which then become communal property. The climate is clearly one of collaboration, not competition.
3. It is not necessary to have a small group leader, in the sense of decision maker. Having a facilitator to keep the group on track, make sure everybody participates and manage the time available, is entirely appropriate, however.
4. It is not desirable to have a small group recording secretary. Each individual is responsible for his or her own notes. Recognizing good ideas when they are offered is a skill worth practicing by all members.
5. Appointing a small group spokesperson is usually not required. Everyone will speak for him or herself in the classroom. Sometimes, instructors give special assignments to groups which require the appointment of a spokesperson.
6. Achieving consensus or a "group position" is normally not necessary. You do not have to agree with each other with respect to the solution of the case. In small group discussion, diversity of opinions and options enriches the learning process.
7. Establish and stick to the time limit. A good rule of thumb should be no more than twenty to thirty minutes of small group time for a single case.

Discussing in the Small Group

Depending on the assignment questions provided, there are a number of ways to structure the small group discussion. If assignment questions are provided consider reviewing the answers to those questions. When no assignment question is provided consider discussing your various solutions to the case. You may also want to open the discussion by taking a few minutes to review any specific difficulties that you experienced during your Individual Preparation. Use your CAR to highlight or add key points made by others and to identify additional contributions you can still bring to the discussion.

Reflecting on the Small Group

Your preparation task does not end with a successfully completed individual case analysis and effective small group discussion. Before moving into the classroom, it is important that you spend some time to reflect. First, identify the key point missed and include these on your CAR. Second, consider why you missed these points and how to improve your Individual Preparation the next time.

Stage 3 – Large Group Discussion

The large group or class discussion completes the Three Stage Learning Process. Figure 1 makes it clear that it is unlikely for any individual or small group to reach the level of understanding achievable at the end of the class. The purpose of the class is not only to reach an optimal solution. It also improves understanding of the tools and theories of the field and their connection to practice. Furthermore, class members share their individual and small group learning with others and are evaluated by peers and instructors.

A standard large group discussion process does not exist. Case classes often appear to be disorderly and lacking in substance to a casual observer. Discussion process variations depend on the class objectives, the subject matter, the type of case, the place in the sequence of classes, previous classes, or other classes in other courses taken simultaneously by the same students. Additional sources of variation include the teaching style of the instructor, the chemistry of the class, the mood of the participants, the time of the year and the physical facility.

Some instructors start the class discussion by asking someone (or several participants) for his or her solution to the case and then work backwards to derive the analysis. Other instructors start by asking for a definition of the issue(s) and proceed in a logical manner towards the solution and implementation. The opening question may be specific or broad and open-ended, depending on the style of the facilitator. If you are called upon or wish to volunteer to start the class, take advantage of this opportunity to say what you believe to be meaningful. Take your time and to explain your insights logically and clearly so that others can connect their subsequent observations in a logical manner.

The Instructor's Solution and What Really Happened: Students should not expect the instructor to provide his or her own solution nor the decision the organization adopted. Hopefully the class would have identified a superior alternative.

Participation in the Large Group Discussion

In the large group discussion learning depends upon each student's giving to, as well as taking from, each session. Without full and regular participation, development of knowledge and skills will be compromised. Seeing participation not as a problem, but as an opportunity with high pay-off, allows you to develop a repertoire of skills directly connected to success and effectiveness in your chosen profession.

Effective Participation: The secret to effective participation in a case discussion is to listen and think at the same time. Meaningful contributions relate to case content as well as the discussion process. Both types are valuable although content contributions occupy most of the class time.

Content contributions derive from your individual and small group preparation. Use your CAR to identify points already raised by others and those that you can still contribute in class. This kind of contribution adds breadth, depth and understanding to the discussion of the case.

Process contributions affect the flow and structure of the discussion. They are based on good listening and reflecting skills, as well as your understanding of the case. Process contributions include: questions that add clarity; suggestions that a certain area of the case needs to be explored; a linkage of points raised earlier; a call to order if the discussion has gone off topic; or a meaningful summary.

Raising Your Hand: In most case discussions it is normal for participants who wish to speak to put up their hand. Usually, the instructor indicates that a particular individual can speak next, or may even indicate a sequence for students to participate. You control whether your hand goes up, not whether the instructor will ask you to speak. Frequency is not as important as quality. Therefore, you should be ready to contribute in every class and throughout the course you should receive your fair share of opportunities to speak.

Ineffective Participation: Ineffective participation involves comments that do not build or add value to the content or process of the discussion. Examples include: repeating case facts or other participants comments, interjecting to agree without explaining why, using questions to deflect the discussion, and monopolizing the discussion.

Effective Listening: Many students have problems with listening. They just wait for their turn to speak or are too busy thinking about what they are going to say. Poor listening creates repetition and discussions that go in circles and lead nowhere. Listening is said to take as much effort as speaking. In case discussion, effective listening includes an evaluative component. You have to compare what is said with your own ideas and positions. Do you agree with what is said? Why? Why not? Answers to these questions will certainly help you participate in the discussion.

Effective Note-Taking: To focus your attention, assist your active listening and help you retain the information for later review, it is useful to make any corrections or additions to your CAR. These notes may take the form of simple annotations, possibly using a different color pen, on your existing preparation notes. They may consist of ideas, insights, concepts, principles, reminders, generalizations or discoveries that will add to your preparation notes. In order for these notes to help and not hamper your participation, they must be brief, to the point, and selective.

Dealing with Specific Challenges to Participation

If you find it difficult to speak up in class here are four recommendations:

1. Good preparation is the key. Be sure that you have thoroughly prepared the case and met with your small group. This will build your confidence.
2. Be proactive. Force yourself to raise your hand at least once in each class. The longer you wait, the more difficult it will be to speak up in class.
3. Choose a seat near the front to reduce the perceived size of the class.
4. If you feel a serious blockage, do not hesitate to speak to your instructor for his or her suggestions.

Be aware that the diversity you bring to the class is positive and enriching. Learning to work with people who are different is extremely valuable.

If you know you are going to be absent from class, it is good practice to let the instructor know beforehand and, if possible, to provide a hand-in such as your CAR for the class. This is an impressive reminder to the instructor that you are taking the course seriously despite your absence.

After Class Reflection

Take no more than five minutes as soon as possible after class, while your memory is fresh, to record and summarize your key learning points and insights on your CAR.

Ethical Considerations

Vital ethical considerations need to be stressed:

1. All of your class notes are personal. Do not share them with anyone other than your own small group. Making notes available to others for free or for a fee is not ethical.
2. Abstain from discussing a case with anyone outside your class.
3. Never search for an answer to a specific case using either public or private sources.
4. Do not contact the organization about which the case is written to find out what decision was taken or what happened subsequently.

These admonitions are all based on the premise that case learning cannot be borrowed. It has to be developed and owned outright by each student. Case learning is similar to mountain climbing. Leaning to climb a mountain cannot be done by taking a helicopter to the top. Going through the process step by step repetitively is what counts.

Conclusion

This guide is about the process of learning with cases. It does not concern itself with the specific content of your course(s). However, the better control you have over the process of learning with cases, the easier it will be to absorb the theoretical and conceptual content. A summary of the learning with cases process covered in this guide can be found in Figure 3.

Figure 3: The Process of Learning with Cases

Three Stage Process	Activity	Case Analysis Record (CAR)
Individual Preparation ***(60 - 120 minutes)***	**Initial Case Size-Up *(5 – 10 minutes)***	**Record**
	Who is the decision maker?	Who (name and title):
	What appears to be my issue and its significance?	What:
	Why has my issue arisen and why am I involved now?	Why:
	When does the case take place?	When:
	Where is the organization located?	Where:
	How long does the decision maker have to make this decision?	How (much time):
	Reading of the Case *(10 – 30 minutes)*	(highlight key facts and make notes in the margin of the case)
	Case Analysis and Decision *(45 – 80 minutes)*	**Record**
	Define the Issues (Urgency and Importance)	Urgency: H M L Importance: H M L
	Analyze the Case Data	Quantitative and qualitative, constraints and opportunities:
	Generate Alternatives	Alternatives:
	Select Decision Criteria	Criteria (quantitative and qualitative):
	Assess Alternatives	Complete alternative table and apply weighting (%):
	Make a Decision	Decision:
	Develop an Action and Implementation Plan	Activity: Start Date: Time: Cost: Resources (People):
	Missing Information and Assumptions	Missing Information: Assumptions:
Small Group Discussion ***(20 – 30 minutes)***	**Effective Listening**	**Check Off** points covered by others
		Record key additional points
	Contribute	**Contribute** points not yet discussed
	Reflect	**Record** special insights
Large Group Discussion ***(80 – 160 minutes)***	**Effective Listening**	**Check Off** points covered by others
		Record key additional points
	Contribute	**Contribute** points not yet discussed
	Reflect	**Record** key learning points