



## International Journal of Management and Commerce

www.managementjournal.in

Online ISSN: 2664-6854; Print ISSN: 2664-6846; Impact Factor: RJIF 5.46

Received: 01-10-2020; Accepted: 15-10-2020; Published: 04-11-2020

Volume 2; Issue 2; 2020; Page No. 39-41

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### Learning management through case study

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#### Abstract

The case study is a widely used pedagogical tool to inculcate managerial expertise among learners of management discipline. The case analysis leads to the development of analytical skills in the participants. In this method of learning the instructor has to play pivot role. The case to be taken for discussion among the participants needs to be prepared in a much thoughtful manner.

**Keywords:** business situations, case study method, managerial skill, pedagogical tool, the instructor

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#### Introduction

Case method as a tool of learning is very important in management. This is why the cases are used as a pedagogical tool in most of the management institutions. However, what is the proportion of cases in various pedagogical tools depends on the policy of the individual institutions and the instructors' own preferences. Case method of learning has the following objectives:

- The description of real organizational situations to acquaint the learners how various concepts and principles are followed in practice;
- Introduction of realism into formal instructions;
- Introduction of various types of objectives, strategies, problems, condition, etc. prevailing in various organizational settings;
- Development of analytical and decision-making skills; and
- Development of independent thinking, but a cooperative approach to work in team situations.

A case is a written description of an organisation containing information about its numerous facets: its history, external environment, and internal operations. However, a case may not have as complete information about the organization as a reader wishes. The amount of detail required would make the case too long to read and too detailed to analyze. In fact, this is the reality with the decision making in actual business operations. Managers seldom have enough information because

1. It is not available, or
2. It is not available at appropriate time, or
3. To acquire the information is too costly.

The result is that managers make decisions on the basis of information at hand after making reasonable assumptions about the unknowns. So, with cases, the analyst must work with the information he has and must make reasonable assumptions. Moreover, a case may have information of varying importance: some may be very useful, some partially useful, and some may not be useful at all. This is similar with the actual practice. A manager may be bombarded by the information and he must find out what is relevant or irrelevant for his. Thus, case also provides

An opportunity to learn to separate the wheat from the chaff. Learning through cases involves case analysis, oral discussion, oral presentation, and written presentation. Through all these aspects lead to the fulfilment of objectives of case method as pedagogical tool, each of them has different contributions.

#### Case Analysis

Prior to undergoing through other aspects of case method of learning, the case under discussion requires analysis. The case analysis leads to the development of analytical skills in the participants. Usually, case analysis involves a process which progresses through the following steps:

1. **Define the Problem:** Each case has a problem or a number of problems. A problem may be defined as the gap between what is desired and what is being achieved. For example, Organisational Behaviour course cuts across the various functional areas and tries to optimize organisational situations taking all functional areas together. Therefore, the problem in a case of organizational behaviour course should not be viewed merely from a functional point of view, though the case may emphasize a particular functional area.

You may identify the problem in the case by reading it more than once. At the first reading. It is better to take note of the points which you consider important. The, you may try to determine what the major and minor problems are, jotting how you might analyze them. In first reading, whole of the problems may not be identified. Therefore, read the case again, and find out through your preliminary analysis whether the impressions gathered by you in the first reading are correct. At this stage, you should define the objectives of the organization, nature of its environment, and its strengths and weaknesses. If possible, discuss the case problems with your friends, if instructor so provides. Often, in actual practice, managers have a lot of discussion with others in making a decision.

2. **Identify the Alternatives:** The problem around which the case is organized is amenable to a solution by several possible alternatives, some of which are obvious form the data of the generated by the participants. At this stage, it is

preferable to generate as many alternatives as possible without evaluating the worth of each. This will provide an opportunity to solve the problem at a much wider canvas.

3. **Analyze the Alternatives:** an analysis of alternatives, the most important step in the case analysis, comprises the break-up of alternatives into parts with a view to (i) detecting the nature, proportion, and function of the parts, and (ii) detecting the underlying relationship among a set of variables. These associations may be used to evaluate possible courses of alternatives. The process of analysis begins with the separation of relevant materials from the irrelevant ones. This process should be taken very carefully because, sometimes, the crucial facts in a case are concealed in a seemingly unimportant remark or a minor statistical exhibit. You should also consider the consistency and reliability of the facts. Sometimes, to fill the data gap, some assumptions are made on the basis of knowledge, experience, and judgement. The case analysis and discussion should not be abandoned on the plea that necessary data to solve the problem are not available. If you feel the inadequacy of data for arriving at a feasible solution, you must justify this position by pointing out the inadequacy of data and the way data can be collected. Analysis of alternatives should be taken in the light of the fact that the problem can be solved by many alternatives and there is nothing like correct or incorrect answer of the problem.
4. **Decisions:** You may now be in a position to arrive at some decisions through which a problems or problems, as identified in the case by you, may solved. At this stage, perhaps decisions as these are associated very much with the choice process. Therefore, in making a decision to overcome a particular problem, it is better to evaluate your decision in the context to totality of the situations and the impact of your decision on these situations, otherwise your decision may generate more problems solving only one.

### Oral Discussion

Case method of learning involves oral discussion in a group. The group may constitute participants with different background in terms of their functional specialization, their values and preferences. The situation would be a simulation of real business decision life as the important decisions are made through deliberations in committee meetings consisting of managers with different backgrounds with the senior-most manager acting as chairman.

However, in a group discussion, there may not be any chairman. Group discussion step of learning through cases aims at developing interpersonal skills in participants. Therefore, you may contribute to the quality of group discussion in case methods by going through the following steps:

1. Prepare the case analysis fully before your go for group discussion as outlined in the case analysis.
2. In group discussion, you have to challenge others stands and defend your own stands. This has to be done on the basis of facts, figures, reasonings, and logics, and not by merely being aggressive.
3. In group discussion, listening is as important and contributory as speaking. It is better to respect others ideas even if these do not match with yours. Others' ideas may provide you're the inputs to arrive at better decisions.

4. In appreciating others ideas, it is better not to get away from your own ideas but evaluate these in the light of new ideas and modify them if need be.
5. A group discussion should not be treated merely an opportunity to show your dominance. You may contribute more to the group discussion by adhering to group discussion norms of group behaviour and tolerance.
6. Sometimes, there is a tendency of over-simplification of problems and avoiding a deep discussion of the issues. This does not help in learning and, therefore, should be avoided. Accordingly, the use of vague and over-generalized statements, such as need for better management 'human nature', etc. should be avoided. There is need for being specific and precise in your approach and relating the ideas to concrete data.
7. Too much emphasis should not be given on arriving at a final and only solution of the problem because a particular problem can be solved in many ways with almost equal consequences.

### Oral Presentation

Sometimes, participants may have to present the cases orally before a group. In a real business situation, any new idea either by a consultant or manager may be presented before a group of managers so that the latter may appraise this and, if required, may adopt in the organisation. To make oral presentation effective, it is better to go through the following guidelines:

- Prepare the case fully as pointed out earlier.
- Oral presentation is not merely reading of written case analysis. While your written case analysis may be evaluated by a single individual, oral presentation is evaluated by a large number of individuals. Therefore, it has to be more convincing.
- Oral presentation must be accompanied by pictorial presentation of major themes of the case in brief through charts, figures, etc. Pictorial presentation conveys ideas more quickly and convincingly as compared to words. However, avoid the overuse of pictorial communication.
- At the end of your presentation, there may be queries from the audience. Do not be afraid of that as you have prepared much more on the case than your audience and you may answer the queries. If the queries are beyond your topic, you may humbly point out that. If there are suggestions for improving your presentation, both in terms of contents and manner, accept those happily.

### Written Presentation

Written presentation is the final aspect of learning through cases. A written presentation of the case consists of those aspects which you have delineated for case analysis. Written presentation of case analysis may be based on the following guidelines:

- A written presentation may have simplicity but does not overlook the major issues involved in the case.
- Written presentation should be in logical sequence starting with the brief presentation of the nature of problem and the reasons for the emergence of the problem, alternatives through which the problem may be solved, how each alternative affects the final outcomes for organization and the additional actions that may be required to implement the decision.

- If you have made any assumptions in arriving at your conclusions or decisions, present the basis for the assumptions.
- If you are incorporating any additional material which may be relevant for the case analysis, quote its sources.

### Role of Instructor in Case Discussion

The role of instructor is very significant in case discussion because he coordinates the entire process. In doing so, an instructor can follow directive approach or non-directive approach. The directive approach refers to an approach in which the instructor directs the group towards a certain viewpoint of decisions. The mode of interaction in such a discussion is frequently directed by the instructor. In the non-directive approach, the role of instructor is to facilitate the discussion by giving an opportunity to the participants to express themselves openly. The group is left free to initiate any carry the process. The aim is to provide a meaningful learning to the participants which comes from within rather than imposed from without. The instructor should have a proper mixture of directive and non-directive approaches depending upon the type of case, level of maturity of participants, and time available for case discussion. In any case, the emphasis should be on learning of participants.

In order to make the case discussion fruitful, the instructor should prepare the case fully so that when the group has major deviation from the case problems, he can bring back the group to focus on the real problems. In doing so, the instructor can only remind the participants about the deviation rather than interfering too much in the discussion process. He should also control his personal feelings to provide utmost freedom for self-expression to the participants without projecting himself on the situation. At the end of the session, he may give his expert opinion but without emphasizing on the suitability of a particular solution of the problem.

### Conclusion

In fact, the reality is that while decision making in actual business operations available information is not complete. This is due to unavailability of required information or sometimes not available at appropriate time. In some cases, to acquire the information is too costly. As a result, managers have to make decisions on the basis of known information after making assumptions about the unknown. The case study method is being used as a pedagogical tool to train the budding managers. The method tries to give real life exposure to the learners of management discipline. The learners are able to develop their managerial expertise with the help of the instructor. The role of instructor is very significant in case study method because he coordinates the entire process. There may be many solutions of the problem being considered in a case.

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