

Cle-Anne Gabriel

**WHY
TEACH
WITH
CASES?**

**Reflections on Philosophy
and Practice**

WHY TEACH WITH CASES?

At the UQ Business School we view education to be a vital component in improving a person's work and life prospects. Dr Cle-Anne Gabriel's work has transformed our curriculum. She played a crucial role in supporting business students' transition from school to university and lays the essential foundation for their transition to professional life. She is a national and international leader in case-based curriculum and resource design.

—Professor Polly Parker

WHY TEACH WITH CASES?

Reflections on Philosophy and Practice

BY

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INVESTOR IN PEOPLE

For Edan, and for all the learners who inspire me.

These cases, thus become vehicles for change in the learning environment, and act as an ‘intermediate step between the classroom and employment as a means to’ discuss and prepare students for client-based projects (Robles & Baker, 2019, p. 205).

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SECTION I

THEORY (WHY I TEACH WITH
CASES)

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WHY I TEACH WITH CASES

REASONS I LOVE TEACHING WITH CASES

I have always found ways to persevere with the things I love most in life, and it is no secret that I enjoy case-based teaching and learning. As an advisor, trainer and educator, I find lively case discussions – especially the ‘aha’ moment when it all comes together for learners – truly inspiring.

After I started using cases more intentionally in the classroom, I was trained in the classic and popular approaches to Case Method by Harvard Business School. Over two sessions in two years – in Bangkok and Boston – I learned about the philosophy and rationale of Case Method and I was intrigued by the many exciting tools and strategies I learned. Learning how to teach with cases was an insightful and inspiring experience.

However, from my very first day of training I struggled to see the applicability of some aspects of this method for my undergraduate and generally younger learners, and I observed it would require some adjustment for many non-American educational contexts. On the one hand, it was clear why the underlying philosophy of case teaching is so characteristic of the business disciplines – it introduces learners to decision-forcing cases that simulate real-world and authentic circumstances of complexity and uncertainty. On the other hand, I found that the usual applications of this approach in the classroom were not widely transferable across the Australian

and New Zealand contexts I worked in. For instance, my class sizes were generally larger than those prescribed for optimal use of cases, especially at the undergraduate level. Also, our classrooms are setup differently, even at MBA level, with no requirement for learners to occupy the same seat each time. Therefore, I challenged myself to make Case Method effective for a wider array of learners and learning environments – from extremely large classes of first-year undergraduate learners with no real-world management experience (I have taught a course that enrolled 2000+ students in a single year) to Australian Master of Business Administration (MBA) and postgraduate learners who bring an exceptional level of experience in large and small- and medium-sized enterprises (SMEs) to the classroom. I saw remarkable potential in Case Method not just for teaching aspiring fast-paced executives but for helping all organisational leaders aspiring to create impact.

Undertaking the challenge of designing case-based curricula and resources to teach management subjects in ways that are more authentic to the profession has been a rewarding experience. I adapted several case-teaching traditions to suit the contemporary and complex realities of managerial practice, directly benefitting both learners and fellow practitioners. Learners gain a better understanding of how theory influences practice; they use the tools I gave them in the workplace to enact and enable change. In short, while case-teaching is popular across higher education (HE) institutions, it is seldom understood why (case pedagogy) and how (Case Method) scholars might adapt context-specific case curricula and resources.

I do not consider myself an expert on case-based teaching. That accolade I reserve for the many teaching and learning scholars who dedicate so much of their time to truly understanding and unpacking the philosophy and practice of teaching with cases. Instead, I see myself as a passionate and curious educator with a strong preference for the use of cases in educational, training and advisory experiences of all kinds. I have used my case-teaching approach across three HE institutions: two Australian Go8 universities (University of Queensland (UQ) and Monash University), and Otago University in New Zealand. I deliver Carbon Literacy training with the use of business cases – helping business leaders

understand the fundamentals of greenhouse gas accounting and decarbonisation. I have also helped business leaders understand carbon neutrality and ‘Net Zero’ commitments with the use of cases. I also trained and mentored more than 50 academics across Australia in Case Method, and have been recognised both institutionally and internationally for my passion for business education and my adaptation of Case Method.

In 2018, I received the Paul R Lawrence Fellowship (from the Case Research Foundation and the North American Case Research Association (NACRA)), which gave me some insight into the vibrant international case teaching community. I remained a NACRA member for over 3 years, serving on its Board of Directors and forging friendships and connecting with like-minded educators globally. Eventually, I was elected Vice President Programs (Elect) of the North American Case Research Association (NACRA), and remained in the role until the end of 2021.

I have also won several awards on the basis of my use of cases in higher education. Most recently, in February 2022 just prior to the time of publication of this book, I received an Australian national award for my work on case-based teaching – the Australian Awards for University Teaching (AAUT) awarded me a citation for outstanding contributions to learning. This humbling but affirming recognition follows similar institutional and international accolades. Reflecting on the results so far, I believe I have amassed enough experience adapting the more classical approaches to Case Method to share some of my own reflections and insights with you, the reader.

The rest of this Section explores my ‘why’ – why teach with cases? I provide more detail about why I enjoy teaching with cases, why it is effective, and why I believe many more educators and trainers should use it too. I acknowledge, however, that time is precious. So, if you have limited time and prefer to skip over this Section’s focus on the ‘why’ and dive right into the ‘how’ in Section

II, let me sum it up for you. Here, in brief, are my top five reasons why I love teaching with cases¹:

1. *Real-world Applicability*

Real-world applicability – the tangibility of concepts – has always been important to me as a learner, and they are now even more important to me as an educator. I believe learners learn best when they understand how theoretical concepts apply in practical situations. A well-written case is based on real-life events and focuses on one or more real-life decision-makers. Using cases helps me translate core concepts into practice.

2. *Versatility*

There is a case for nearly every situation; it is simply a matter of knowing where and how to find it. Sometimes it can be quite difficult to find a written case that fits your needs – my suggestion is always to try a video case or live case study instead. If you have enough time to prepare, you could also write your own case. There are several outstanding books that cover the basics of case writing.² The possibilities are numerous. Not to mention, the many different approaches to case presentation and publication as well as learning and assessment design mean you can really mix things up in the classroom.

3. *Engagement*

There are few very good substitutes for a dynamic case discussion. Simulations, and site visits to see professionals in action firsthand, are perhaps two teaching methods that could elicit the same or even better levels of engagement among learners. However, an educator's ability to provide these experiences to learners is limited by several factors, including resources, access to appropriate technology and cohort size. Cases are a relatively cost-efficient and simple way to give learners the chance to walk

¹The statements in the images that follow are actual quotes from my undergraduate and MBA students about their case-learning experiences in my classroom.

²Try these for example: *Teaching & Writing Cases: A Practical Guide* (Heath, 2015); *The Case Writing Workbook: A self-guided workshop* (Vega, 2017); and *Writing Cases: The Proven Guide* (Wood, Leenders, Moffette-Leenders, & Erskine, 2019).

around in the shoes of real-life professionals. You will find that the right combination of case choice, timing and activity design means students willingly and enthusiastically come along for the ride.

4. *Inclusivity*

As many of the facts of a truly engaging case are often open to interpretation, case-based teaching invites and welcomes the different experiences and perspectives of learners. I provide a gentle nudge by playing devil's advocate in the classroom, or simply by introducing an alternative perspective or interpretation of case facts. I believe this nurtures open-mindedness and critical thinking. Also, the international community around case teaching is amazingly vibrant and inclusive. It helps to be connected to communities of like-minded educators. It is encouraging to feel connected to other tertiary educators who 'get it', so I strongly encourage you to seek out other passionate case-based trainers and educators.

5. *Speed and Efficiency*

I have found that using cases in my teaching leads to much faster uptake of key concepts than traditional didactic approaches. This is especially useful for teaching highly intensive courses. In addition, because case teaching comes with its own well-established philosophy and rules of practice, rigour is not lost when covering important concepts quickly with the help of a case. Still, case pedagogy is so versatile, you can speed things up or slow them down as needed to suit the pace of your learners.

I have summarised my 'why' in just five simple points, and in no particular order. I will admit though that real-world applicability and engagement are my top two reasons. In the next two sub-sections of this chapter, I dive a bit deeper into my own personal 'why'. If you are all about action and want to understand my 'how', then dive right in to Section II of this volume.

MY TEACHING PHILOSOPHY

I want learners to leave the learning environments I create with more questions than when they first entered. I want them to embrace *not* knowing, because I believe it helps them develop the confidence and comfort to ask difficult questions, to explore, experiment, critique and seek deeper underlying causes and potential solutions. Finally, after wrestling cognitively and intellectually with a problem, my hope is always that the learner feels inspired and empowered to act. I believe very strongly that, after all, ‘the great aim of education is not knowledge, but action’ -Herbert Spencer.

I believe teaching and learning comprises a social contract between teacher and learner. In my experience, the Socratic technique of asking probing questions (Brooke, 2006; Bruner, 2003; Herreid, 2011) is the best way for educators to fulfil this social contract, and create experiences that inspire and empower learners to take action. Socratic questioning techniques focus on uncovering and questioning fundamental (often, assumed) principles, theories and beliefs about a particular issue or problem (Brooke, 2006; Bruner, 2003). I prefer to achieve this by asking my students probing questions such as ‘Why do you say that?’, ‘Is that always the case in such situations?’, ‘Did anyone see the problem another way?’ or ‘Do we have reason to doubt this evidence?’. I believe that asking challenging questions is a useful tool to engage learners in discussion or debate; to help them arrive at the heart of the subject matter themselves. I believe if I can give my students the habit and experience of asking effective questions to deepen their knowledge or test their assumptions, I will have brought them closer to genuine intellectual and functional autonomy. Therefore, it is crucial to create learning environments where this autonomy can be creatively expressed.

What Is Teaching?

For me, teaching means helping learners develop genuine autonomy to learn and solve problems in the world around them, *continually*