

Rebecca J. Morris

Happy 100th Birthday! Cases then, now and beyond

September 2020 marks the 100th birthday of the publication of the first business casebook. The author was Melvin Thomas Copeland, a noted professor of marketing at Harvard University. Copeland had been developing a book on the emerging field of marketing but was persuaded by Harvard's Dean, Wallace B. Donham, to develop a "casebook to be used as the basis for instruction in marketing" (Copeland, 1958a). The book included a chapter on "marketing methods" that described the discipline of marketing at the time and approximately 400 "problems" or cases.[1]

Copeland reported that between November 1919 and May 1920, he wrote "problems" for the casebook. His role as Director of the Bureau of Business Research played an important role in the development of the casebook. Copeland explained, "I put the 'problems' together from situations that I had encountered in our research work, from situations that had been reported in business publications and other sources, from experiences that had come to my attention during my wartime work in Washington and from a few new business contacts" (Copeland, 1958a).

As a Harvard College Law graduate in 1898, Donham had been introduced to the case method in his legal studies. Donham recognized the need for the "realistic training of students for the work which they were to undertake upon graduation and especially for advancement in their profession" (Copeland, 1958a). One of the most fundamental objectives of the business school was to train students to exercise judgment on business problems. Donham believed that the "case method" of instruction was the best way to achieve this objective. He believed that the business school's aim was to:

Give "the student training for practice in dealing with business problems. This requires practice in:

- Ascertaining facts.
- Appraising and sorting facts.
- Stating business problems in a business way.
- Analyzing business problems.
- Reaching definite conclusions.
- Presenting such conclusions orally and in writing (Copeland, 1958a).

Cases[2] were to focus on the problems "faced for administrative decision by actual business executives and presented with factual detail sufficient to allow the students to put themselves in the position of those executives and to develop their own decisions" (Copeland, 1958b). Cases did not have single right answers, which proved disconcerting to some of the students. The case method was a "process of instruction in analysis, logical thinking and decision-making, rather than in a ritual of 'right answers' (Copeland, 1958b).

Rebecca J. Morris is based at the Department of Economics and Management, Westfield State University, Westfield, USA.



The casebook's external adoptions prompted the development of the first "key" to provide a set of answers to the cases in the book. This forerunner of the Instructor's Manual or Teaching Note was distributed in mimeographed sheets to the adopting instructors. The "key" provided a brief statement of each case's main points, the general significance of the case and the author's conclusions. Copeland asserted that some instructors misunderstood the purpose of the case method by presenting the key as the "right answers" to the case. Copeland found this misapplication of the key to be a "basically unsound procedure."

The purpose of the case method, as practiced at Harvard, was to develop students' ability to make sound business decisions using the information in the case and common knowledge. Students analyzed situations, judged trends and weighed diverse influences based on the information provided by the case writer. Cases sometimes contained extraneous information that was less germane to the problem, but this was done to develop students' discernment. It was considered unfair to use information in the discussion that was not given or available to the students in the case.

With this historical understanding of the origins of the case method in business education, we can compare the past, present and future of cases. The following significant categories have been identified for our analysis:

- Pedagogical objective.
- Research methodology.
- Organization of the case.
- Instructor materials.
- Pedagogical methodology.

Please see [Table 1](#) for the analysis of these categories as they relate to past, present and future cases.

The case method's pedagogical objective has not changed much over the past century – cases are still used to provide students with practical training in critical thinking and decision-making. The case method continues to deliver what Professor Emeritus Paul Lawrence described more than 60 years ago – "A good case is a vehicle by which a chunk of reality is brought into the classroom to be worked over by the class and instructor" ([Lawrence, 1953](#)). Cases of the future may expand beyond, "what should the protagonist do?" to prompt students to critically consider the global challenges of the times – sustainability, inclusiveness and ethics from the broader perspective of organizational stakeholders.

Case researchers in 2020 and beyond will undoubtedly have greater access to information in a variety of forms that can be accessed from their home offices. Research methodologies will remain a combination of both field interviews and library sources; however, modern technologies may make it possible to virtually conduct field interviews and company tours. These technologies will make distant research locations accessible by more researchers without the constraints of time and travel.

Emerging technologies will also transform the case organization. Multimedia and technological innovations will bring more of the real world to students to make cases more compelling. Cases will move from a primarily text-based format to a hyperlinked format with a full range of video, dynamic maps and even simulations. New technologies will also allow cases to be easily updated to provide current information to students as the business climate and situations change.

Instructor's materials in the form of the Instructor's Manual or Teaching Note will remain relevant for two reasons – first, the IM/TN is considered the scholarly contribution of cases. Case research is slowly gaining the appreciation of other scholars and deans. High-quality teaching materials will continue to be critical in winning recognition of case research as high-quality

Table 1 Past, present and future of cases

Category	Past (1920)	Present (2020)	Future (Beyond 2020)
Pedagogical objective	Developed to provide practical training in analyzing factual business problems to make sound business decisions. Focus is on developing the power of thinking and not the acquisition of facts	Continued emphasis on providing practical training in critical thinking and decision-making. The case method is considered to be well suited for higher-order cognitive skills categories of analysis, synthesis and evaluation as ascribed in Bloom's Taxonomy	Complexities in technologies, dynamic external environments and shifting sociocultural values and attitudes provide stronger motivation for emphasizing critical thinking and decision-making skills. Students need to have the capability to analyze novel situations, develop innovative solutions and to critically evaluate those solutions. "Case studies could play an important role in critically engaging students with the global challenges we face in building a more inclusive, ethical and sustainable society: encouraging students not to think about what managers and organizations in the case did, but how they and other stakeholders, might have defined problems otherwise and thought and acted differently." (Bridgman <i>et al.</i> , 2016). This type of thinking will have increased value in business going forward
Research methodology	Based on real organizations either through research work or business publications	Based on real organizations either through field or library research. Broader research sources are readily available due to internet and social media	Technological innovations, increased interest in access to information and accountability, the propensity of real organizations to provide greater access to information about their operations
Organization of the case	Basic statement of key facts typically from the company's perspective. Few cases have a protagonist or decision-maker featured. Case length varies from three sentences to 30 or more pages. Cases typically end with questions for students to consider	Cases have evolved to place greater interest in engaging students. Typical components include a "hook," company history, industry background, situation details, exhibits, closing hook. Many cases include a protagonist and feature direct quotes providing the protagonist's perspective on the case situation. This permits students to consider the psychological aspects of business decisions. Case length varies from 1,000 words or less to 15–25 pages. The current trend is toward shorter cases. Cases typically do not conclude with questions for students to consider. These questions are moved to the Instructor's Manual so that adopting instructors have maximum flexibility in teaching the case	Student engagement continues to be an issue. Students cannot participate in case of discussions if they have not read the case Multimedia and technological innovations may provide the means for making cases more compelling for students. "Online case materials can include color photographs, embedded video clips or other multimedia materials that enrich and enliven the case for visual learners. Video interviews with case protagonists can reveal more about her personality, priorities and interests than we might get from reading a printed quote. Dynamic maps and interactive graphics allow students to dig deeper into case data to develop essential insights into case issues" (Purkayastha, 2020). Cases of the future may depart from the written format of text and tables to use rich multimedia materials to bring students that much was closer to reality (Garvin, 2003)
Instructor materials	Originally not provided, simplistic "key" including a synopsis, significance of the case and author's conclusions.	Instructor's Manual (IM) or Teaching Note (TN) is required for all cases published in journals. Components	The continued importance of IM/TN in the reflection of trends in increased teaching by practitioners and adjunct

(continued)

Table 1

Category	Past (1920)	Present (2020)	Future (Beyond 2020)
Pedagogical Methodology	Provided only to adopting instructors. Considered inappropriate to provide case information in the “key” that was not available to students Considered essential for effective teaching of cases by instructors lacking real-world business experience	typically include a synopsis, target audience, learning objectives, discussion questions and answers, theory discussion, teaching strategy, optional epilogue. The IM/TN is considered by AACSB International to be the scholarly contribution of cases. Most journals peer-review the IM or TN. Reviewers often identify information provided in the IM/TN that should be moved to the case itself	professors. Continued emphasis on the research contribution of cases and IM/TN for AACSB institutions. Increased emphasis on the teaching strategy section including the expansion of this section to include aspects related to online teaching of cases
	The instructor served as a moderator or facilitator to stimulate student thinking and to encourage further discussion. Questions were asked to keep the discussion active and purposeful, but the instructor had to prepare for deviations from previous discussions of the same case. Effective use of the case method required the instructor to take a guiding role rather than a leading role in case discussion	The case discussion has not changed much, as the case method was first implemented. Instructors are advised to be the “guide on the side” rather than the “sage on the stage.” Online case teaching has resulted in active experimentation to develop the best approaches to replicating in-person case discussions in an asynchronous or synchronous environment	Continued exploration of creative and innovative approaches to facilitating case discussion for both in-person and remote learning. Technological innovations may be transformative in bringing students even closer to the reality of the business situation

scholarly contributions. Second, instructors’ materials will remain vital due to continuing trends regarding governmental support for higher education, student financial needs and rising costs. These trends will result in increased pressures to shift teaching from tenure-track professors to professors of practice or adjuncts. Many of these instructors will welcome the support that a well-written Instructor’s Manual can provide.

The Covid-19 pandemic’s impact on higher education has forcefully pushed instructors to adapt the case method to embrace remote learning. The sudden closure of universities and colleges across the globe in March 2020 caused many instructors to rethink case facilitation, thus accelerating the transformation of pedagogical methodologies. Uncertainties about the duration of the current health crisis will promote even more experimentation with new approaches and new technologies.

We may be witnessing the cusp of a transformative renaissance in case writing and teaching. It will be exciting to see the pedagogical shifts that derive from evolving teaching modalities. As with any significant change, it will be important to remember that not all experiments succeed. We will need to be flexible and open-minded to innovations and critically evaluate new pedagogies to ensure that the desired learning objectives are attained. Successes should be shared through pedagogical articles and conference presentations to spur further developments and transformations. Historically, Harvard University led the way in the case method and trained others to both write and teach with cases. Will Harvard continue to lead in the case method going forward or will a new group of scholars “seize the day” and take the case method into new directions? Where will the case renaissance begin?

At 100 years young, the case method remains relevant as an instructional pedagogy for business students. Today, Harvard Business Publishing boasts a catalog of over 50,000 teaching materials (cases, simulations, articles, books and so forth). The CASE Journal catalog includes over 250 double-blind, peer-reviewed cases with instructor’s manuals. These cases are included in the Emerald eCase Collection of over 2,000 cases. Demand for new cases in an expanding array of academic disciplines continues to be high and new case writers are being developed through case workshops and hackathons. In total, 100 years of

Table 2 Cases in this issue

<i>Case title and target audience</i>	<i>Authors</i>	<i>Synopsis</i>
Towny: A new business model for a mobile economy Target Audience: Undergraduate students in entrepreneurship courses such as new venture finance	Tyler Self	Towny: A new business model for a mobile economy shares the context and issues surrounding CEO Nathan Baumeister in the spring of 2018 at Towny, a unique business helping local businesses connect with their consumers over mobile devices. The company began going to market based on the vision of its owner and Nathan's boss, Don Shafer. It had quickly approached local business clients and consumers in five key markets The purpose of the case is to allow students the opportunity to discuss key new venture creation concepts and scenarios such as customer value proposition, competitive advantage and digital marketing
InvisaWear: Evolving the entrepreneurial mindset Target Audience: Undergraduate students in business or entrepreneurship	Sunny Sun Roberto Santos Xiaoyi Luo	In the summer of 2016, the future of invisaWear suddenly became uncertain. Rajia Abdelaziz and Ray Hamilton had conceived an idea for smart jewelry that they felt solved a real problem. However, it was one thing to have a great idea and quite another to turn that idea into a real business. As engineering students, they were accustomed to solving problems, but if they truly wanted to make an impact, they had to learn to solve problems as entrepreneurs. With the help of DifferenceMaker® and their mentors, they developed an entrepreneurial mindset and decided to build invisaWear into a company
InvisaWear: Bridges under construction Target Audience: Undergraduate students in business or entrepreneurship	Sunny Sun Roberto Santos Xiaoyi Luo	Having graduated from UMass Lowell with engineering degrees, co-founders Rajia Abdelaziz and Ray Hamilton build invisaWear into a venture, but they did not know much about business. With coaching from their mentors, Rajia and Ray focused on building their network to raise capital to finance the business. Despite all their hard work networking, however, they faced a hurdle. Rajia and Ray contemplated their dilemma. "Are we doing something wrong? What can we do differently to attract investors?"
Sir Allen Stanford: Inmate #35017-183; A case study of a Ponzi scheme and its aftermath Target Audience: Upper-level undergraduate or graduate students in fraud or forensic accounting courses Minority shareholders dispute Tang Plaza's value Target Audience: Undergraduate and graduate students in intermediate accounting courses	Kevin Flynn Phyllis Belak Sean Andre Ming Jian Rony Lim	Ponzi schemes – one of the most common types of investment fraud – have caused investors to lose billions of dollars. Because of the prevalence of Ponzi schemes and the ramifications to investors, it is important for business students to understand the nature of these schemes and to learn how to recognize them. As future business professionals, students will be charged with recognizing a Ponzi scheme early and uncovering it before investors lose their investments The case centers on an iconic Singaporean integrated retailing and property landlord entity: Tang Holdings. As part of its succession planning, the company's founding family decided to take its listing arm, C.K. Tang Limited (CK Tang hereafter), private in May 2006. The Tang brothers, who represented the controlling family, initiated several attempts to delist the company. The minority shareholders of CK Tang were unhappy that the offer price was below the net asset value of the company. The minority shareholders also highlighted that the reported fair value of the flagship Tang Plaza complex understated its highest and best use and might not possibly comply with IFRS 13
Pricing and scholarship optimization at waypoint adventure Target Audience: Upper-level undergraduate or early graduate-level students in operations management, revenue and pricing management or marketing courses	Benjamin Marcus	A young non-profit organization serving the disabled community in Boston sought growth but lacked clarity and consistency in their program pricing and scholarship structures. The case analysis centers on revising program prices to achieve specific cost and revenue requirements and determining a scholarship policy that will maximize participation in their outdoor adventure programming for the upcoming year. This case allows the exploration of optimization with an atypical objective, as the organization seeks to maximize participant engagement rather than profit
Maruti's Nexa – Enhancing customer experience beyond buying Target Audience: Graduate students in retail management, sales and distribution management or marketing management courses	Arun Kaushik Geetha Mohan	Nexa was launched by Maruti in 2015 to enhance the buying experience of its premium customers, and to reposition itself as a premium brand. It started offering customized services to car purchasers through its well-trained employees, attractive store environment and Omnichannel experience. Through all these facilities, though Nexa had a bumpy ride for selling its first product, it managed to pace up and perform better in the next few years. It remained to be seen how Maruti would handle competitor and cost challenges and how it would strategize its efforts to strengthen its footprint in the Indian automotive industry

business cases and thousands upon thousands of students [. . .] Cases deserve a standing ovation, an honor, a salute for all the instructional value they have provided over the past century. Happy 100th Birthday, Cases!

In this issue

This issue includes seven cases (Table 2) focused on a wide variety of companies, locations and issues. This issue includes three entrepreneurship cases, two accounting cases and two marketing cases. Each case has a strong IM providing effective teaching strategies, theoretical linkages and complete answers and analysis to all discussion questions. TCJ IMs have been rigorously peer-reviewed to ensure that adopting faculty can teach these cases and the authors. Enjoy!

Notes

1. A reprint of this historic casebook can be ordered from Amazon.com.
2. Donham preferred the use of “cases” to “problems.” The “problem method” of teaching became the “case method” under his guidance. The terminology was ratified in a faculty vote in 1921.

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