DOCUMENT RESUME

ED 271 797 CS 505 311

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TITLE The Case Study Method of Instruction: Achieving Competency in the Organizational Communication Classroom.
PUB DATE Apr 86
NOTE 28p.; Paper presented at the Annual Meeting of the Central States Speech Association (Cincinnati, OH, April 17-19, 1986).
PUB TYPE Speeches/Conference Papers (150) -- Guides - Classroom Use - Guides (For Teachers) (052)

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Case Studies; Higher Education; *Organizational Communication; *Speech Communication; *Teaching Methods

ABSTRACT

Noting that with the increased popularity of courses in organizational communication, a wider array of pedagogical techniques is required to enhance students' learning experience and thus produce more competent participants in organizational life, this paper presents a rationale and guidelines for the use of case studies as an instructional technique. The paper first defines case studies and discusses the educational value of the technique in terms of enhanced cognitive ability and student interaction. The paper next presents guidelines for the use of case studies, discussing ways that the risks implicit in this method can be reduced, and how cases should be selected. The paper also discusses factors affecting student participation in case study discussion, including instructor style, amount of participation desired, and the discussion techniques to be used for processing the cases. Finally, the paper offers three types of resources for the teachers wishing to use case studies in their courses: (1) a sample case presented with suggestions for processing the data in class; (2) various topics for teacher generated cases; and (3) several sources for an abundance of good cases. (HTH)

The Case Study Method of Instruction: Achieving Competency in the Organizational Communication Classroom

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Presented at the April 1986

Central States Speech Association

Abstract

With the increased popularity of courses in organizational communication, a wider array of pedagogical techniques is required in order to enhance the student's learning experience in order to produce more competent participants in organizational life. The case study method of instruction offers the teacher an approach that increases student participation, develops student cognitive abilities, and ties the course content into a solid reality base. This article offers guidelines as the effective use of the case study method and provides several resources that the teacher can use in order to implement a wide variety of cases in the course. A sample case for class discussion is also provided.

The Case Study Method of Instruction: Achieving Competency in the Organizational Communication Classroom

Perhaps the fastest growing area of interest to both teachers and students of speech communication over the past decade has been that of organizational communication. Surveys conducted by Downs and Larimer (1974), Pace and Feingold (1976), and Pace and Ross (1983) have charted the growth in departmental interest and curricular development in courses in organizational communication. Such growing interest in organizational communication places a great demand on teachers of those courses to develop methods of instruction that give the student the best possible learning experience. Surveys, such as those cited above, give us more insight into the content of courses in organizational communication than in methods of instruction. In addition to traditional classroom techniques such as lectures, discussion, and role plays, a valuable tool for classroom instruction is to be found in the use of case studies.

Numerous textbooks covering organizational communication make use of case studies. The normal (though not the only) approach used with cases is for the author to provide one or more cases with apparently fictitious names followed by a series of one, two to five questions for

class discussion. There is seldom any direction given to either the student or the teacher on how to use the cases beyond the questions listed. Of the few exceptions to this statement, none offer the teacher or the student an option to the approach advocated by the specific textbook. McCaskey, Gabarro, Dittrich (1978) have writted the instructor's guide to accompany Athos and Gabarro (1978) in the teaching of interpersonal skills. Their use of cases is based on the Harvard approach as it applies to interpersonal behavior. The guidance offered to the instructor is excellent but limited to the individual text. Micheli, Cespedes, Byker, and Raymond (1984) have written the instructor's guide for their text on management communication. Their discussion of the use of cases is an excellent presentation of the nature of cases, the role of the instructor, and the nature of student participation. While an excellent offering, it also suffers from the narrow focus of its application. Clearly nothing is really wrong with any of these presentations of the case method of instruction other than their somewhat narrow interpretation of it. Only Mier (1982) has recently offered a new application of the case method for communication teachers.

This essay will explore the case study method of

instruction in order to offer guidance for a variety of ways of using the method in the organizational communication classroom. The discussion will explore the nature and the value of the case study method of instruction, present guidelines for its use, and offer several resources for the teacher of organizational communication in search of cases.

Nature and Value

Arriving at a meaningful definition of the case method of instruction is a difficult task. According to Dooley and Skinner (1977), "The phrase 'case method' embraces such an array of pedagogic practices that the term itself has no precise connotation. There are as many varieties of the case method as there are practitioners" (p. 277). This sentiment is echoed by Dunn (1954) who says that the case method "stubbornly refuses to stand still to be photographed" (p. 92). Despite such variety of applications, several conceptual elements emerge from the literature on cases. These elements can first be described in terms of the content of cases.

Matejka and Cosse (1981) offer a broad definition which encompasses many elements of the case method.

> A case is an account or description of a situation or sequence of events confronting an individual,

> a set of individuals, or an organization. Most cases include a detailed account of the events leading to the point in time at which the case concludes. In addition, information about the principals in the case is usually provided along with various types and amounts of financial, accounting, marketing, economic, competitive and environmental data. Generally, the information provided in the case is the same information that was available to the decisionmaker(s). (p. 3)

These authors also indicate that cases may be "true cases, disguised cases, and fictitious cases" (p. 3). With the first type, the teacher may select a set of facts directly based on a real example, such as Johnson and Johnson's defense to the Tylenol related deaths. With the second type, the teacher may choose to illustrate a set of real life circumstances without divulging the real names of those involved. This will protect confidentiality but remain tied to a basis in reality. Such cases may come from the teacher's personal experience. In the third type, the teacher may choose to create a hypothetical example in order to illustrate a principle or set of principles in organizational communication.

The second set of conceptual elements related to

the case study method of instruction covers teacher/student involvement. Most of the teacher's involvement comes with preparation of the case. Once given to the class for analysis, the students assume the major part of the class discussion. "These real and particularized cases are presented to students for considered analysis, open discussion, and final decision as to the type of action which should be taken" (Gragg, 1954, p. 6). While student participation in case analysis may vary in terms of quantity, the essential character of the method has been termed "a democratic learning process" by Dunn. This focus to the case study method offers a range of student centered, rather than teacher centered, classroom activity.

> Again there is a continuum with two extremes. One extreme is that of the very informal atmosphere in which students are encouraged to participate freely in class discussion of the case. . . . The other extreme is such that individual students or teams make formal presentations of their case analysis and conclusions to the class. . . . Regardless of the atmosphere, you should be aware of the one thing that the instructor will usually not do. The instructor does not lecture. (Matejka and Cosse, p. 17)

This conceptual definition of the case study method presents a pedagogical approach that requires careful instructor preparation of case material and allows a student a wide range of class participation.

Altnough some of the values of the case study method may be apparent from the above discussion, three values deserve special focus. First, the case study method of instruction can make a valuable contribution to the development of the student's ability to think and to problem solve. Second, it can provide a special form of learning through participation and performance. Third, it provides students with an introduction to the realities of communication within organizations.

According to McNair (1954), the case method of instruction can significantly enhance the student's cognitive ability. Cases offer students the opportunity to analyze data, identify problems, discuss/argue over their analysis, and offer possible solutions. Dooley and Skinner maintain that cases develop skill in problem analysis, synthesis of action plans, and maturity of judgment.

Student learning is further enhanced through class participation with fellow classmates. The value of this aspect of the case method is based upon the belief that

learning is self-acquired. According to Gragg, "Wisdom can't be told" (Dooley and Skinner, p. 285). Involvement in this context gives the student actual experience working through the same communication problems faced by organizational members. The experience has been compared to public speaking practice by management experts.

> There is a great deal of difference between knowing what a good speech should be and actually making a good speech. . . . However, there is a great difference between knowing the characteristics of a good speaker and actually giving a good speech. One cannot learn to make a good speech without actually making speeches. Therefore, the responsibility of the instructor is to provide you with a vehicle through which you can practice analyzing business situations, drawing conclusions, and making decisions. (Matejka and Cosse, p. 18)

Students thus learn by doing under the case method.

By providing students with cases that are tied to real organizational communication situations and circumstances the case method offers students a reality based education. The value of this approach has been heralded by numerous case study scholars. Students will learn to respond in a far more realistic and practical fashion when they have

worked through the complexities of handling a rumor or an irate employee in an appraisal interview in a case.

Guidelines

While the case study method offers several advantages for the course in organizational communication, several guidelines should be kept clearly in mind. These guidelines will be discussed in three parts: in general, according to case types, and student participation.

In general terms, several points are significant. First, the case study method is risky for the teacher. There are no guarantees that students will respond to the method. Such a democratic of instruction and learning requires both that the student be sophisticated in self instruction and that the teacher be willing to function in a modicum of uncertain progress (Dunn). The uncertainty can be reduced to the extent that the teacher relates cases to a lecture format, tests, papers, and/or the focus of each case use... Second, cases should not be viewed as a simple, easy substitute for giving a lecture. Nor should they be viewed as a means of adding variety to the course. Cases require planning and preparation by the teacher. They should fit into a cohesive course plan. The instructor also needs to be thoroughly familiar with the details of the case. Where it has been condensed

from the facts surrounding a real scenario, the instructor would be wise to be familiar with the background data in as much detail as possible.

The selection of cases to be used in an organizational communication course should be done according to a continuum that plots various levels of difficulty and clarity of focus for the case. On the one end of the continuum, some cases may be presented to students with a clear focus and relative ease of analysis. On the other end, case data should be presented with very few clues as to the exact nature of the problem. The student should begin with fairly simple, focused cases and progress to more difficult, unstructured cases. The value of such a continuum has been explained by Pigors and Pigors (1961).

> A young man graduated with honors from a top-ranking business school. Presumably, therefore, he should have been well prepared to tackle administrative problems. But he failed to make good on his first job. He rationalized his failure by saying: "If only someone would give me a problem, I know I could solve it. But all I can see here is a mess." What had gone wrong? As it happens, we know that the cases he had studied were highly formalized.

> In them, too much had been done for him, and not enough had been asked of him, or by him. (p. 20)

As case complexity increases, the student's sophistication can both increase and be monitored by the teacher.

Student participation is one of the most important areas of concern for the instructor. Three factors should be kept in mind: instructor style, amount of participation desired, and the discussion techniques to be used for processing the cases.

Dooley and Skinner have described a style continuum ranging from a very nondirective, "facilitating" style to a highly directive, "demonstrator" style. Matejka and Cosse explain the impact of this type of continuum.

> While it is useful to be aware of the wide variety of role options available to an instructor, it is easier to think of the instructor's role as being somewhere along a continuum. The two ends of the continuum are: (1) a completely democratic situation where the instructor is a peer, a friend, a member of the class; and (2) a directional situation in which the instructor is obviously the leader, directs the discussion, and may give partial analysis when a particular point needs to be made or emphasized. (p. 16)

The teacher should use cases in a way that fits in with his/her teaching style. For the teacher who is not comfortable with a loosely structured class situation, cases can be used with either highly structured class discussion or written analysis and brief discussion.

Student participation clearly flows out of the teacher's ability and desire to teach in a less structured, less directive atmosphere.

Discussion of cases should be carefully prepared and thought out in advance. Three points should guide the teacher's preparation as outlined by Pigors and Pigors.

The case discussion should eventually have a clear focus and sense of direction. Eventually is used in terms of the complexity continuum previously discussed. The hand of the teacher may be used to insure that points made regarding the case will have a firm grounding in the theoretical concept(s) underlying the case.

The case discussion should be made to deal with specifics, rather than wandering off into vague generalities. The teacher's hand again can gently but firmly insist that the discussion be based on case details.

The case discussion should be free and informal so that the student may feel both spontaneity and creativity when analyzing the case.

With proper understanding of its nature and values and with adequate preparation, the teacher of organizational communication courses can enrich the student's learning experience through the case study method of instruction. It now remains to approach the case resources available to the teacher.

Case Resources

This section will offer three types of resources for the use of teachers wishing to use case studies in organizational communication courses. First, a sample case will be presented with suggestions for processing the data in class. Second, various topics will be suggested for teacher generated cases. Third, several sources will be identified for an abundance of good cases.

Bendix: Agee & Cunningham

Mary Cunningham graduated from the Harvard Business School in June 1979. She received more than 30 job offers from major financial corporations. She accepted the position of executive assistant to William Agee, Chairman of the Board at the Bendix Corporation in Southfield, Michigan. By October 1980, Cunningham had been promoted twice to vice president of corporate and public affairs and to vice president of strategic planning. She was

also forced to resign after two months of public rumors that her rapid promotions were the result of a romantic relationship with William Agee, her boss and mentor.

There were several principal characters involved in the Bendix story. Mary Cunningham came to Bendix from a strict Catholic family background. She describes herself as an introverted, scholarly, saint who carried a personal sense of guilt over her parents divorce. She graduated from Wellesley with honors in philosophy and from the Harvard Business Cshool with an MBA. William Agee came to Bendix in 1972 after a meteoric rise in corporate life. From the Harvard Business School in 1963, he took a job at Boise Cascade in Idaho where he became the chief financial officer at age 32 in 1967. In 1972 he went to Bendix at the request of J. Michael Blumenthal, the Chairman of the Board of Bendix. Agee served as president of Bendix from 1972 until 1976 when Blumenthal joined the Carter cabinet. Agee then became the chairman of the board at Bendix. J. Michael Blumenthal was Agee's mentor while Agee served as company president. When Blumenthal left the Carter Administration in the spring of 1979, Agee did not offer him a seat on the Bendix board of directors. Blumenthal's enmity with Agee seems to have started with this decision. William

Panny was appointed president and chief operating officer of Bendix by Agee. Panny's strength was in corporate operations. Panny held a conservative business philosophy and opposed Mary Cunningham's influence over Agee. In September 1980 Agee fired Panny.

When Mary Cunningham came to work at Bendix in 1979, she entered an intensely political situation. Agee's senior management team gave her clear signals that they did not buy Agee's management style or philosophy. They also gave her clear signals that they did not buy women in senior management. Her first reaction to her encounters with the team was frustration. "I wanted to cry, but God knows women can no longer cry in corporate corridors." After a series of frustrating and humiliating interviews, she reports that Agee summarized the situation for her.

> I think I know what's been going on. "Let's see if I've got it right. Jacobson tried to scare you. Svec **didn't** say a word. Hastie tried to snow you and Donnelly put you off with his warped sense of humor. Right?

When asked, "Whom do you rely on?" Agee replied, "None of them." Despite problems with her marriage (due in part to the necessity of moving from New York to Detroit) and inner turmoil over the decision to work at Bendix,

Mary Cunningham decided to work with Agee at Bendix.

Once at Bendix, Agee's dependence on her grew as his frustration with his management team increased. Such dependence by Agee led to Cunningham receiving profuse praise for her work efforts in public while Agee consistently criticized the efforts of the team. They were seen together at business related parties and social functions as well as at private family functions, such as ski trips to Colorado. As the 1980 presidential election year mania increased, Agee became prominent in Republican circles as potential cabinet material for the presidential candidate, Ronald Reagan. As Agee was drawn more and more into the limelight, he depended even more on his executive assistant. This dependence grew at the same time that his marriage was deteriorating. It was within this atmosphere of presidential politics and broken marriage that Agee was called upon to play host for a great many parties in the weeks leading up to the Republican convention to be held in Detroit during the summer of 1980. Agee asked Cunningham to coordinate the parties. Cunningham describes the summer.

> Those were whirlwind weeks. There were parties day and night. As many vice presidential hopefuls as there were . . . that's how many parties Bendix

gave. There were luncheons for George Bush, Gerald Ford, and John Connally, and dinners for Howard Baker and Paul Laxalt. I might have had my hands full regardless, but an event in Agee's personal life doubled my work that month. Diane (Agee's wife) had abruptly left for the summer with the intention of not returning until her divorce was final.

During the parties Agee and Cunningham were the only members of the senior management team that were without spouses. According to Cunningham, Panny and Diane Agee were responsible for the development and at least initial generation of rumors concerning a romantic relationship between Agee and Cunningham.

By June 1980, two new developments had occurred that would have an impact on the rumors and the climate at Bendix. The first development was the appointment of J. Michael Blumenthal as Chairman of the Board at Burroughs, a Bendix competitor also based in Detroit. According to Cunningham, Blumenthal held a grudge against Agee for not having been offered a seat on the Bendix board of directors. The second development was the effort by Blumenthal to woo Bendix vice president for strategic planning, Jerry Jacobson, over to Burroughs.

These two developments marked the beginning of Blumenthal's war on Agee and Cunningham.

On June 26, 1980, Mary Cunningham received her first promotion to that of vice president for corporate and public affairs. In her own words, "I began my tenure as Bendix' youngest corporate vice president. I had a lot to learn, but my biggest lesson was one they never taught us at Harvard Business School. It was called Corporate Politics or who played ball with whom." During September 1980 a major restructuring of the organization was to be announced and implemented by Agee. It was also the month during which the rumors concerning Agee and Cunningham began to surface in a serious manner. In early September Agee was approached by members of the Bendix board of directors about questions raised to them by Blumenthal concerning the nature of his relationship with Cunningham. She had now been promoted a second time to vice president of strategic planning. The rumors received additional fuel when in mid September Agee fired Panny. Panny's comment concerning the firing was reported as, "I got between Agee and his girlfriend." Additionally, by Labor Day, word of Agee's divorce was also circulating around the company.

The primary opportunity for Agee to deal with the rumors came at the end of September. His management philosophy involved an annual meeting with all 600 employees at the Southfield headquarters. The annual meeting was scheduled for September 24, 1980. David Taylor, external director for public relations, urged Agee to respond to the rumors at the meeting. He also urged Agee to invite the press to the meeting. Agee made his first public effort to deal with the rumors at the meeting. One media source reported his comments as follows.

> I know there have been a lot questions, there have been a lot or rumors, Agee told his thunderstruck audience. I know it has been buzzing around that her rise in this company has been unusual. It is true that we are very close friends and she's a very close friend of my family. But that has nothing to do with the way that I and others in this company evaluate performance. Her rapid promotions are totally justified.

As the meeting was in the process of breaking up, Cunningham was approached by a reporter from the Detroit Free Press.

> So, how long have you been sleeping with the boss? he said, What? I said. I couldn't believe what I'd heard. I'm not going to dignify that question

with an answer, I said. Then you're not going to deny it? he asked.

From September 24 until October 9, 1980, the furor concerning the Bendix rumors continued to grow to the point that they were endangering the corporate reorganization. On October 9, 1980, David Taylor released an announcement to the press concerning Mary Cunningham. The announcement contained a copy of her letter of resignation, the acceptance letter from the board, and a letter from Agee concerning the matter. The mentor-protege relationship had ended.

The above case is rich in its potential for student analysis and class discussion. Two primary topics suggest themselves for class discussion although others may be identified. The case is an excellent example of pointing out the joys and sorrows of the mentor-protege dyad as well as the growth, poser, and life of organizational rumors. Processing may proceed along relatively simple lines through either an assigned paper or small group discussion of questions such as: (1) What happened in this situation? (2) Why did this situation end the way it did? (3) How could it have been prevented? Processing may take on a more complex nature with a simple open ended challenge to the students, such as, analyze this case.

The narrative of the case may also be rewritten to expand the details, increase the cast of characters, and involve other organizational communication issues, such as intrapersonal factors, peer group influences, group decision making, or supervisor-employee relationships.

This sample case was the result of simply paying attention to real situations that gained public attention. Simply by monitoring public reports of organizational life in the United States, the organizational communication instructor can identify countless cases that relate to course concepts. Good sources to monitor include popular business periodicals, such as Business Week, Fortune, Wall Street Journal, Inc, or Forbes, or the Wharton-Business Times Management Report on cable television. From this relatively simple method, cases will emerge that illustrate organizational credibility such as with Tylenol, Rely, and Bopal. Others will illustrate rumors, such as P & G and satanic control. Still others will illustrate innovative message flow such as 3-M on the PBS film, "In Search of Excellence." Also from that film are mini-cases on culture at Disney, Apple, and IBM. The list is literally endless. The only problem comes into play when deciding which cases to research and write up.

In addition to such sources for case creation, there exists a plethora of excellent source books and textbooks for identifying good cases. The following sources by no means constitutes an exhaustive list, but the list is intended to be suggestive of the types of places that the teacher can go in order to find ready made cases. The first group of sources consists of works that either have ready made cases or that have data which can be modified into a case with relative ease. Center and Walsh's work on public relations offers an excellent collection of ready made cases. Cunningham's book on Bendix will give the teacher more background data than can be used in a single semester. Kanter and Stein's collection of writings on the workplace includes several articles that provide the basis for useful cases, such as banana time. Peters and Waterman's work on excellent corporations in America has abundant data on case illustrations.

Beyond these excellent collections of case data, several textbooks make excellent use of cases. Athos and Gabarro provide excellent cases that focus on interpersonal behavior. Baird provides nice brief cases for easy focus and direct class discussions. Cummings, Long, and Lewis (1983) blend cases very

nicely into the overall pattern of their book. Other books by Myers and Myers (1982) and Gray and Starke (1984) also provide an abundant collection of useful cases. The point on these textbooks is not which one includes cases, but which one uses them as you wish to use them.

The use of the case study method of instruction is an exciting and challenging way of stimulating excellence in student class participation while simultaneously adding a reality based dimension to the course in organizational communication.

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