

speaking from experience . . .

Case Studies: A New Approach

By MATTHEW J. HENNECKE

The case study has always been a favorite tool among trainers. In fact, most of us have two or three favorite ones that are threadbare from overuse. They're good for sessions on motivation, leadership, delegation, etc., and the reason we keep using them is because they're effective. We recognize the importance of satisfying participants' hunger for realism, and in the classroom, nothing spans the gulf between theory and reality better than a case study. That is why some of the nation's most prestigious universities rely so heavily on the case method of instruction. Case studies produce an "immediacy" of thought and action not present in other instructional methods. Conventional case studies, however, have their limitations:

- *Case studies are not realistic enough.* As hard as we try to infuse realism into our case studies, participants seldom consider themselves to be more than dispassionate outside observers. Even when a case study is taken from the files or ledgers of an actual organization, participants feel removed from the reality of the situation.

- *Participants seldom feel the need to carefully weigh all alternatives.* When the characters in a case study are fictitious or distant, participants frequently make rash judgments or offer untenable solutions. And why not? They have nothing to lose by taking artful leaps in logic. After all, it's not *their* problem.

- *Participants may take actions*

unlike those they would take in real life. I can recall many occasions when I have used case studies to illustrate the difficulty of dealing with performance problems and discipline. My purpose in using the cases was to encourage new managers to appreciate the difficulty of taking disciplinary action against employees. In one such case, an employee refuses to work overtime even though the necessity of overtime is the direct result of the employee's continued poor performance. Without hesitation, the majority of the participants decided to fire the employee.

Now, firing the employee may or may not have been the correct course of action, but I was particularly disturbed at the speed—the cold swiftness—with which they made the decision. Then it occurred to me: the participants acted without emotion. They could easily fire the employee because they did not know him; they had no relationship with him. Firing him was not difficult, because it was not painful. In their own jobs, I doubt they would act with the same speed or resoluteness. The case study method had failed to imitate reality adequately and had, therefore, left the participants unprepared and ignorant of the genuine discomfort associated with real discipline problems.

Individualized case studies

If there were some easy way to design individualized case studies—whose characters include the participant's own subordinates, peers and superiors—then the case study would be more realistic and, as a result, more effective. Rather than being outside observers, participants

would be characters in the case situation. They would certainly be less cavalier in their approach to the case problems; their actions—suddenly tempered with the emotions of dealing with their own coworkers—would probably reflect the actions they would take in real life.

The problem, of course, is not how to individualize case studies, but how to *easily* individualize case studies. We have always had the ability to design individualized case studies—simply write one for each participant. The problem was time. Where do we find the time to write 15 or 20 different cases?

Current word processing technology now makes designing individualized case studies practical, easy and enjoyable. All it takes is a typewriter with storage/retrieval and automatic typing capabilities and a little research and creativity.

The process

Take your favorite case study (or write a new one) and read through it, marking the names of characters, titles, company names and any other specific information that identifies the case with an organization other than your own. You should also be sure to mark personal pronouns like "he" and "she" because they too will change depending on the gender of the characters you later insert. After you have edited your case study, go back and insert consecutive numbers at every point where a name, title, pronoun, etc., will be needed. Then, have this case study "framework" typed and stored in the typewriter's memory. A portion of a sample case study

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"framework" below illustrates how your case study might look in storage:

...your name is 1 and you are the 2 of the 3. Yesterday you returned from a trip to your 4 office where you were berated for the poor performance of the 5 agency. That agency is run by 6, who is a hard worker and a good friend, but who seems unable to delegate effectively. You've had problems with 7 before, but now 8 incompetence is beginning to get you into hot water. Your boss has as much as told you that you've got to get rid of 9 immediately...

Now you are ready to begin the individualizing process in earnest. Select the names, titles, personal pronouns, etc. appropriate to a specific participant, and list them as in the example below:

- | | |
|--------------------|----------------|
| 1. Ann Ogleby | 6. Paul Hansen |
| 2. manager | 7. him |
| 3. Peoria division | 8. his |
| 4. Chicago | 9. Paul |
| 5. Springfield | |

After you have completed this process for all participants, the individualized information can be easily edited into the case study as illustrated below:

...your name is Ann Ogleby and you are the manager of the Peoria division. Yesterday you returned from a trip to your Chicago office where you were berated for the poor performance of the Springfield agency. That agency is run by Paul Hansen, who is a hard worker and a good friend, but who seems unable to delegate effectively. You've had problems with him before, but now his incompetence is beginning to get you into hot water. Your boss has as much as told you that you've got to get rid of Paul immediately...

Obviously, individualized case studies will not be feasible or

easy to develop in all circumstances. I have found they work best in the following situations:

• *When dealing with a homogeneous group.* Individualized case studies are easier to develop when the basic "framework" of the case is relevant to all or most of the session participants. Are participants from similar departments or functional areas? Do they have similar reporting responsibilities and similar jobs?

• *When the numbers are small.* Even with the aid of technology, it can be time consuming to develop individualized case studies if the number of participants exceeds 20 to 25. Similarly, the total number of insertions needed per case should probably be kept within manageable limits. I find 30 to 40 about right.

• *When you have access to needed information.* Developing individualized case studies usually requires research into the names and reporting responsibilities of the participant's staff, colleagues, etc. Is such information readily available on organizational charts or other records?

Applications

Individualized case studies can be effective in sessions on virtually any management topic. They can be useful in programs on motivation, discipline, delegation, leadership and performance standards and succession planning. Nothing makes managers take notice of the importance of succession planning more than a case study that includes their own subordinates—subordinates who, as the case develops, resign or retire, thereby causing sudden, unanticipated openings. Individualized case studies may also be applicable to assessment centers, with cases designed for each of the center participants. Whatever the application, the impact of individualized case studies far surpasses that of conventional cases—individualized cases are the truest reflection of reality available in the classroom.



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