A live-case lite approach as formative assessment

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Abstract

Written case studies have been widely used in marketing. This method presents some shortcomings. We have suggested an approach employing a version of live case studies involving managers of a local company as formative evaluators contributing to an iterative and formalized formative assessment process. This approach may add some interesting features such as presenting a more relevant and realistic context to students as they are more likely to work in that sort of business in the future. It also helps students to deal with ambiguity inherent in business life by conducting a nonlinear, but iterative, learning process. Finally, this process allows the application and understanding of theoretical concepts
Keywords Case study teaching, live case study, formative assessment, strategic marketing
Introduction

Traditional case study teaching has been widely used in marketing and strategy classes. It contributes to developing students' hard and soft skills. However, it also has some limitations such as its static feature, its limited description of context and its tendency to become outdated. To alleviate these shortcomings, we suggest using a written case study about a local company and inviting its managers as guest speakers. Managers can enrich case discussions with knowledgeable insights and can explain why some options are not chosen. Group presentations are assessed by peer students in order to highlight their strong and weak points. Finally, the instructor will lead a discussion to demonstrate alternative views, to explain the useful tools and concepts to apply, and to link theory and practice. This approach of associating a written case study with guest speakers can be considered a version of a live case study. Moreover, this iterative approach including three kinds of feedback, i.e., from the company managers, from classmates and from the instructor, is used as a formative assessment process.

Literature Review

The case study method offers experiential learning opportunities (Forman, 2006) as it fosters learning by doing and "guided discovery under the watchful eyes of an expert" (Markulis, 1985, p. 168). It provides a narrative that "describes an actual situation, a real life example, that involves a decision, a challenge, an opportunity, a problem, or an issue faced by a person or people in an organization and requires the reader to 'step into the shoes' of the key person in the case" (Boulocher-Passet, 2015, p.2). Therefore it contributes to develop a better understanding of management issues (Markulis, 1985) and to bridge the gap between theory and the real-world complexity of business problems (Boulocher-Passet, 2015; Bove & Davies, 2009; Culpin & Scott, 2012).

Specifically, the case method can be used to take into account different perspectives and to consider alternative solutions (Weil, Oyelere, Yeoh, & Firer, 2001), to provide a neutral situation to discuss, to develop self-analysis, independent thinking and confidence (Boulocher-Passet, 2015), and to foster the ability to work in group and train presentation skills (Hassall, Lewis, & Broadbent, 1998), etc. Through case analysis, theoretical material generates new conceptual insights and becomes more relevant by making it more practical (Boulocher-Passet, 2015; Ross, Zufan, & Rosenbloom, 2008).

In brief, case studies are perceived as important by students because they pull together theory, practice and the real world (Weil et al., 2001).

However, traditional case studies are often seen as overly "static, one dimensional, and inadequate simulations of real-world" marketing problems (Burns, 1990 quoted in Bove & Davies, 2009, p. 230). A persistent criticism is the lack of realism (Markulis, 1985; Wilson, 2008). Written cases are

also seen as impersonal and insufficiently documented (Wilson, 2008). In particular, they lack information about the economic, social, political and technological context discussion (Cameron, Trudel, Titah, & Léger, 2012). Personalities and their decision-making styles are also difficult to portray in writing (Markulis, 1985). Finally, they tend to become outdated very quickly (Markulis, 1985; Wilson, 2008).

Considering all these shortcomings, students may demonstrate a lack of commitment in class discussions (Miner, 1979). Some authors explain it as a lack of maturity, general education and experience of students (Beckman, 1972). Others argue that cases display only preassembled and essential facts that reveal the solution very early. Therefore, it tends to discourage interest, effort and further analysis (; Markulis, 1985). Discussions can also easily be poorly managed and become dominated by a few vocal students and/or degenerate into endless debates (Kelly, 1983; Markulis, 1985).

The live-case-study technique is a variant of the case method (Wilson, 2008) with an additional dimension of reality (Markulis, 1985). One of the main differences between live and traditional cases is that students work in a live environment with an organization to solve a real business problem (Burns, 1990; Wilson, 2008) with partial information and under conditions of uncertainty (Corey, 1999; Culpin & Scott, 2012).

For Cameron et al. (2012), the live-teaching case method is a hybrid teaching method that alleviates several of the traditional case method shortcomings while combining the benefits associated with the presence of a guest speaker in class. It transforms the passive guest speaker event into an active one (Cameron et al., 2012). Compared to traditional cases, live cases show positive outcomes for students and companies. In particular, they augment students' interest and learning (Markulis, 1985). However, using live cases increases instructors' workload which is estimated to be around 30 hours per case (Wilson, 2008). It might explain why live cases are still underutilized in most business programs (Kennedy et al., 2001).

The formative assessment process imbedded in a live-case lite approach.

This paper explains the process followed to discuss a live-case lite study of a local branch of a Swiss nation-wide retail bank, Raiffeisen. The case described the situation of a local branch, the Banque Raiffeisen Moleson (BRM), with 36,000 customers at the end of 2006. The written case and the questions are submitted to undergraduate students in their final year as it combines strategy and marketing perspectives. In groups, they answer the questions. Three groups (out of 12 groups) have to prepare a 15-minute presentation to be made in class to their classmates and two managers of BRM, its current managing director and its retail operations manager. Then, the groups' work is evaluated through a formative assessment process (see Figure 2).

A class is structured into three parts across three class sessions. At the first session, instructors explain theoretical concepts and distribute the written case and questions to the students. In between, the students have to analyze the case and answer the questions. Then, the bank managers come to class and participate in the case discussion. Students present their analysis to the managers and their peers. To prepare for the next class, students have to assess their performance and that of their peers. In the last class, students and professors discuss the strong and weak points of each group. Finally, the instructors share their own insights by referring to and applying the theoretical concepts. The instructors take advantage of the iterative assessment process as they can identify the areas that need more attention and they can adjust their closing comments in order to strengthen students' understanding.

In summary, we designed a three-stage formative assessment process, starting with feedback from bank managers, followed by self-assessment and peer-assessment in groups, and finally, by the instructors' feedback and closing comments.

Some findings

We conducted an exploratory research based on semi-directed interviews of students and bank managers involved in our classes.

Benefits to the bank are numerous. Bank managers are interested in listening to students' presentations to get an unbiased perspective that may challenge their taken-for-granted assumptions. BRM managers are particularly interested in getting the insights of young and potential future customers; students may shed a different and unexpected light on an issue. As managers of a local branch dedicated to local activities, they feel a social responsibility to support educational events. They may also attract new graduates to apply or new customers.

Students may not be convinced by the process. They may feel that their peers are not qualified to give valuable and accurate feedback. As such, they consider this assessment as not fair (as noted by (Bicen & Laverie, 2009). Moreover, they feel that it takes time from their leisure time (free time is scarce) and they don't understand the benefits to be gained. Therefore, either this assessment element should be redesigned according to students' comments, or it should be better explained to the students in order to make them understand the objectives in terms of skills development and the benefits to be gained.

Feedback from the professor is a traditional component of any case study discussion. We just want to highlight the iterative loop going back to techniques and concepts explained at first and the mechanism that allows for adjusting the feedback to the aspects of poor understanding revealed throughout the process. At the end of the process, the instructors can also take the opportunity to focus on and highlight the key issues and concepts. They also can bring their own insights about the application of concepts in a real "local" context and the outcomes.

Students seem to appreciate the iterative process consisting of being exposed to new theoretical concepts and techniques, applying them in the context of a local case study, getting feedback from the managers and finally analyzing their application and reinforcing their understanding thanks to the insights of

This paper discussed the use of a lite version of live case studies as a formative assessment process. It differs from traditional case studies as it promotes the learning and application of theoretical concepts as an iterative process, rather than as an inductive process as the result of a case discussion. We have identified key differences between traditional case studies and our approach to live-case lite studies. References available upon request