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Paper 39 – Full Paper

The Extended Case Study Method of Assessment in Marketing Education

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Abstract

This paper advances the literature on the pedagogic role of the extended case study method of assessment in marketing education. It commences by outlining the traditional case study approach of assessment, and outlines its limitations. This critique leads to a discussion of the 'middle ground approach' of the extended case study, and consideration as to how it can be deployed in marketing assessment. The centrality of secondary research to the extended case study method is discussed. The article concludes by summarising what the author regards as some of the principal benefits emanating from the extended case study methodology of assessment.

Keywords: *teaching, marketing, case study, assessment*

Introduction

This paper seeks to explore a method of assessment that I have utilised (along with colleagues) in my teaching practice; that being the extended case study method of assessment. The method of assessment has been used in a final year undergraduate module in Marketing Management and a Postgraduate module in Strategic Marketing Management. In keeping with a commonly used case study approach, students are presented with a printed case study, and the tutor sets questions for them to address. However the approach I adopt differs from many other marketing assessment case study methodologies utilised, in that students are required not to 'stop' at the case study in producing their responses, but rather to engage in systematic secondary data compilation and analysis in order to formulate their

answers. The assessment is usually a 2000-3000 word essay format, which comprises typically 50% of a module's credit value. The approach is used as an assessment tool for students who predominately have no or limited prior work experience at strategic levels in organisations. In writing this paper I have several aims. The first is to advance the pedagogic literature, in an area where there has been previous limited consideration. The second reason for writing this paper is to allow my students to gain insights into my thinking on the use of the extended case study. This will be useful for them when completing learning and assessment on modules that I have assessment responsibilities for. The third and final reason behind this contribution is that although I have used the extended case study approach several times as an assessment tool, I have not critically reflected on its pedagogic significance in terms of my teaching practice. Thus the article is a launch pad for literary, student and this author's learning advancement.

The paper comprises five sections. Section one outlines the traditional case study approach. The second section introduces the extended case study method of assessment as a 'middle ground approach'. This leads to the third section that discusses issues in the effective deployment of the extended case study approach to assessment. The penultimate section discusses the role of research in the extended case study assessment. The paper concludes with a final section which presents what the author regards as some central benefits to the use of the extended case study as a means of assessment in marketing education.

1. The traditional case study

The case study method is well established as a tool of business education, and is commonly argued as being a principal learning method employed in leading international Business Schools such as Harvard Business School, IMD Switzerland (Jain, 2005) and Stanford (Harrison-Walker, 2000). The method has however now spread to become common currency in marketing education across the global business school sector. In essence, the case study is a tool of learning that enriches the practical relevance of theories to real life situations (Chapman, 1995). Marketing case studies typically represent a 1-20 page summary of a marketing situation faced by an organisation, produced by a single or small team of academics, and are published in text books or through various commercial case study publishing organisations. Harrison- Walker (2000) states that:

“a case study consists of a description of a real or simulated managerial situation along with a personal history of an individual, institution or business faced with a problem that must be solved (Andrews and Noel, 1986; Herreid, 1994 [cited in Harrison Walker, 2000]). Participants study the information presented in the case, come to their own conclusions about what should be done... describing and defending their recommended course of action (Andrews and Noel, 1986; Herreid, 1994 [cited in Harrison-Walker, 2000])” (Harrison-Walker, 2000, p. 241).

Little, Brookes and Palmer (2008) cogently asserts case studies in: “marketing education ... usually involves a description of a business situation, requiring students to identify and solve general or specific business problems embedded in the situation” (Little et al, 2008, p. 125). They are very useful in showing students marketing in real life situations, and useful as contexts for which to apply the marketing theories that are taught in a given module (Wills, 1978). They allow students on taught programmes to see how marketing may be practiced in the real world, and are especially useful where students have no or limited prior experience in employment. Thus the case study method of assessment are beneficial in that “students are more likely to internalize concepts used to solve real world marketing situations” (Andrews

and Noel, 1986; Herreid, 1994 [cited in Harrison Walker, 2000])” (Harrison-Walker, 2000, p. 241).

The case study reports tend to be a descriptive narrative based upon a particular organisation, but within the context of a significant marketing problem(s)/ issue(s) that need to be resolved. At the end of the case study, there may be some suggested questions by the author of the case study that require the student to link the case study to some marketing theory or theories. Hence, it is intended that these questions are used as a basis for individual or group student discussion. This can be discussed verbally in class, as part of an assessed written assignment, and/or used as presentation topic. The students thus have the task of identifying the appropriate theories to be utilised, searching within the case study narrative for the facts of the case that relate to that theory, and critically applying the facts of the case to the theoretical frameworks that are specified. Dependent on the level of the case and students, this can be a challenging process since they need to ‘disentangle’ and cognitively disregard secondary contextual facts of the case study, and instead draw out the main facts of the case study so as to address the question set, and apply the specified theory to the context. The authors of the case study are likely to have structured the case study in a theoretically ‘disorganised’ fashion, so that the students need to ascertain and organise the facts of the case according to the schematics of a given marketing theory. Once the facts of the case, relevant to a particular theory are discerned by students, and linked in to a cohesive theoretical framework as specified in the question(s), then they are typically required to make marketing recommendations based upon the evidence of the case study. Hence this phase enables students to consider how the theoretical frameworks can illuminate possible practical trajectories for the organisation.

The recommendations the students posit are unlikely to have been actioned by the organisation in the specific manner that they articulate. Hence, the assessor has to form a judgement on whether the recommendations are well thought out, well justified according to theory and the context of case study, as well as overall judgement as to whether the recommendations make ‘business sense’. This is sometimes inherently challenging for an assessor as they need to recognise that there is not one correct answer, but rather a range of possible solutions (Harrison-Walker, 2000) based upon the assumptions, approach and justification of the student. Thus as Jain (2005) correctly articulates there are ‘multiple perspectives’ (Jain, 2005, p.83). It may be challenging for students to make recommendations at two levels. At the first level, the information in the case study is likely to be incomplete (Willer, 2003) and outdated, meaning that the students make decisions on the basis of imperfect information (Harrison-Walker, 2000). It can be articulated that this notion of uncertainty allows students to further their skills in terms of dealing with environmental ambiguity and uncertainty that is typical in many real life marketing decisions. At a second level, it may be difficult for students to make recommendations based solely on the case study text, because they are in possession of information as recorded in their minds (via media coverage, other learning contexts etc) that is relevant to the particular case study organisation. This is particularly the situation where the case study is based on an organisation that has considerable media coverage, or where the underlying themes within the case study are of topical and general interest. In these cases, the student may find him/herself in a sense of confusion as to whether the response they create should be solely determined by the content of the case study, no matter how outdated it may be, or whether they should add to their work by using information stored in their minds about the company. Hence, if the latter is adopted then a student may either be accused of not keeping to the spirit of the case study and hence not given credit in marking, or if credit is given, then other students may feel

that they have been at an unfair disadvantage to the student who may have passively ‘picked up’ information about the case study context that they may not have had exposure to. Thus giving students marking credit in terms of additional information beyond the case study information is a difficult issue for academics to contend with. Therefore the traditional case study often leaves students in a sense of peer competition (Little et al, 2008) where gossip floats around as to whether a friend is ‘just sticking to the case study information’, especially since another friend may be perceived or suspected of doing some of their own secondary research. Hence, informal dialogue between students begins to frame at which level a case study should be addressed. It is in these circumstances that I advocate an extended case study approach to assessment.

2. The extended case study- ‘a middle-ground approach’

An extended case study method of assessment is an approach whereby the printed case study is used as a ‘starting point’ and not an ‘end point’ in the student’s learning experience. Hence the tutor will specify a case study to be read, but additionally will specify that students need to undertake secondary research as a requirement of the assessment.

Whilst the use of data collection is well established in the literature on ‘live case studies’ (e.g. Chapman, 1995; Elam and Spotts, 2004; Fairhurst and Good, 1993; Forman, 2006; Lincoln, 2006; Little et al, 2008) the approach I propose in this paper is somewhat different, as a ‘live’ case study involves ‘working with/ in’ a real life organisational context, and thus involves primary data collection. Whilst the ‘live case study’ approach has benefits that are discussed well in the existing literature, the ‘extended case study’ approach I advocate is distinct in that it recommends the use of secondary desk based research, rather than primary data collection which is built into the ‘live’ method. I believe that the extended case study is a ‘kind of middleground’ between the typical printed case study learning experience that requires no substantive research beyond the case study, and the substantial research and resource commitment of a ‘live’ case study. The extended case study has pedagogic significance, yet is widely neglected in the literature as the foci of existing study has been in terms of the traditional or live case study approach. I believe this is a significant omission in the marketing education literature as academics, especially at higher level advanced modules in marketing at Bachelor’s level, and specialist Master’s level marketing modules would benefit from the approach. This is because the traditional case study approach may be perceived as too narrow a learning task, yet the ‘live’ case study is impractical because of assessment workload, organisational and resource limitations.

I should be clear that I am not arguing that the traditional and ‘live’ case study should not be used in assessment. Rather I contend our understanding of marketing case study assessment should be expanded so that we recognise that marketing case studies can be usefully deployed from the ‘middle ground approach’ of the extended case study method as discussed in this paper.

3. Deploying the extended case study method of assessment

In this section I relay my views as to how an extended case study method of assessment can be deployed. The extended case study method of assessment can be facilitated by choosing a case study that has a publication date between 2-5 years before it is used as an assessment tool. This means that the content of the case study, whilst still having relevance will be contextually outdated, and thus encourage students to update their knowledge of the organisation and the case study context using secondary data collection methods. In this author’s experience, questions which are set, are best when they specify that students employ

a theory/ theories that are general enough in scope that: (i) allow students to ascertain relevant information from the case study so that they can guide their secondary research; and (ii) so there is enough information in the public domain for them to update their knowledge of both theory and the practical situations involved in the case study. In my own assessment question design, I have tended to use this approach by setting questions associated with analysing the marketing environment (e.g. requiring PESTEL (political, economic, socio-cultural, technological, [natural] environment, legal), and Porter's (1980) Five Forces analyses etc). These are commonly used models used in marketing management curriculum, but also fulfil the dual function of suggesting to students a framework for analysing the narrative case, and secondly from there to foster directions for their secondary research. The choice of case study is critical so that the models anticipated in a given question can be applied to the specific content of the case study. There should not be a 'perfect match' whereby all the answers are found in the printed case study, as gaps should be present in order to underline the importance to students of their own secondary research. Building upon the arguments of Forman (2006), it is also important to choose a case study where the organisation(s) in question have experienced some degree of environmental change and turbulence in recent years. Thus through this approach students will further understand the need for secondary research. In my own teaching practice, I have found that case studies from the airline industry are particularly useful for this purpose however there are many other sectors/ companies that have experienced turbulence in recent years owing to the recent financial/ banking crisis. The challenge is for: (i) the academic to choose a case study that s/he feels knowledgeable about; (ii) is likely to be of interest to students, and hence enable students to be more productive and motivated learners (Greenwood, 1993); (iii) where theoretical frameworks can be adequately applied (Willer, 1993), and; (iv) there is enough information in the public domain for students to adequately complete the extended element of the case study assessment. The question set should clearly state that there is a need to apply the models to the present day; thus again reiterating the need for secondary research as an integral element of assessment.

4. Researching and the extended case study

I will now progress the article by discussing how students may approach the secondary research element required of the extended case study method of assessment. The first phase of the secondary research would include traditional scholarly research and reading associated with the principal theories. At a basic level students are likely to use major marketing textbooks, supported by lecture notes. Students should however be encouraged to use scholarly search engines for relevant academic articles associated with the theories needed to complete the extended case study successfully. This potentially enables students to learn the art of academic searching, choosing valuable sources, and discerning aspects of the article that are relevant at a theoretical level to the assignment. Some students may experience difficulty in seeing the direct relevance of this phase in the research process, as the papers they are likely to encounter are not likely to be in the specific context of the set case study.

Hence, students need to have explained to them they are looking for elements of theory within academic articles that may have theoretical relevance, rather than practical relevance to the case study in question. The objective of such wider scholarly research enables students to be exposed to seminal works, on-going debates, critiques and tensions present in marketing theories that are seldom highlighted in marketing textbooks. Hence, through this approach students should begin to develop their critical and higher level interpretation of theory (Harrison-Walker, 2000; Hershey and Walker, 2006; Lincoln, 2006). However students should be advised that they are not expected to understand all of the advanced research

content of an academic writing (given the high level it may be pitched in terms of methodology), but rather to gain a broad understanding of the main theoretical positions advocated in a particular article. The approach should also enable students to understand the process through which knowledge (in the vein of academic research) is produced, and allow students to appreciate the value of research undertaken by academics in business schools.

The second phase of secondary research that should be utilised by students is in terms of finding out information of relevance beyond the publication date of the case study to the present day. The information to be collated, organised and analysed by students should be material that is of relevance to the theoretical models anticipated in answers to the set question(s). It is interesting that given the frequent assertion that students are extremely internet savvy, as indeed they are, students find searching for corporate information of a reliable nature quite difficult. They tend to start with major general internet search engines and quickly become overwhelmed by the volume of information that this generates and struggle to find means to reduce search engine output, and generate search lists that are both valuable, and can be deemed reliable for the purposes of an academic assignment. Other students may try to use traditional e-journal academic search systems and search for information on the specific content of the case study. As the case study is often specific to a particular organisation(s), this is often far from fruitful, as these types of databases predominately hold material produced by scholars, and hence there is unlikely to be any articles of substantive depth that are useful for the temporal updating of corporate information. This issue is further compounded in that even if there were valuable information useful to the students through such systems, then given the longevity of peer review, and publication processes, the content is likely to be as outdated. Admittedly, there are often some general public / practitioner oriented serial periodicals / magazines contained in academic search engines that may be more up to date, but it is unlikely to give the student sufficient depth to complete the assignment effectively.

With all of these difficulties students then seem to turn to the corporate web pages of the case study organisation. This is obviously of significant value in finding up to date information about the company, and getting an 'overall feel' for its strategy, especially since students may not have necessarily experienced as a customer, the offering of the organisation. However, students need to approach information from a critical perspective, and triangulate corporate sources with other 'independent' and external sources so as to ensure that any marketing copy on such corporate sites is not 'painting too rosy' and subjective/ biased opinion of the organisation. This task is made more difficult with the growing advent and popularity of commonly utilised web based forums whereby stakeholders publish comments about a particular company. Such forums may be useful for students to discern up to date information about the case study organisation, yet students should also be challenged to consider what value should be given to comments, as they could be either legitimate observations of use in completing the assignment, or alternatively unfounded attacks on an organisation's integrity.

Given such difficulties I often advise students to use aggregated newspaper search systems to find up to date information relating to the case study organisation. Again, if the organisation they are studying is a large organisation or the themes in the case study are commonly rehearsed in the media, then students may be overwhelmed by the outputs generated. Hence, students needs to be encouraged to undertake advanced searches, and narrow down the search to focus on newspapers that are deemed to be more reliable (i.e. national/ international broad sheets). In addition, sophisticated systems may include specialist industry newspapers that may have relevance. It may also be useful for students to search in more regional and local

press outlets where a case study topic has relevance/ significance to local interests. In all cases students should be encouraged to critically appraise the significance of such press reports, and triangulate with other sources where possible. This may include information that is available from highly respected and independent web based and television news providers.

5. Conclusion: the benefits of the extended case study

It can be argued that a number of benefits flow from the extended case study approach of assessment. At the module level, it enables students to apply theory to real life case scenarios (Fairhurst and Good, 1993; Little et al, 2008; Willer, 1995; Wills, 1979), and thus make for more meaningful and valuable marketing recommendations in their assessments. It also encourages them to undertake deeper learning by exploring a greater range of sources. Thus the learning experience is generally perceived by students as enjoyable. As an assessor there is significant scope in using the extended case method for less able students to engage with the assessed task, but equally it allows for the brightest students to be fully stretched, and earn the potential to achieve higher marks.

It can also be argued that the extended case study method of assessment has positive effects on the approach of students' learning on their wider programme of study, and in particular during their dissertation, as they will have experienced how to undertake in-depth secondary research. It will encourage students to appreciate the importance of searching for and employing critically, relevant resources. This skill is so central to effective learning in higher education, and should be perceived by students as very much common practice. This poses questions as to what level (year of study) the extended case study method should be introduced. My experience of using the method has been at final year undergraduate and taught postgraduate levels. I am of view that the method could be introduced at second year undergraduate level, at the earliest in a student's programme of study. However, whenever it is introduced I have found that there is a need to ensure that students have been effectively counselled into how use e-journal, and other internet based academic search systems. Whilst instructions can be given in a seminar setting, some students may need additional support on how to use search systems effectively. Thus it is often found that some degree of library training support needs to be organised. Alternatively the academic may make time available via consultation hours to demonstrate how to use such academic e-search systems to those students who may lack confidence in their use. This can be quite labour intensive and repetitive, but it is often rewarding to see students learning how to make use of academic e-search systems, in the knowledge that is likely to improve their marks across their programme of study. However, the benefits for the students of the extended case study method of assessment do not stop at their time at university. This is because I believe the method equips students with highly valuable skills of use in terms of their future employability. In particular it may allow students opportunities to impress in an interview situation, but once employment is secured they will have greater skills in critically searching for information related to their work. This will undoubtedly encourage them to make greater use of empirical evidence in their decision making that is likely to benefit their career progression, as well as the performance of their organisation. There are also benefits to the management of their own lives as citizens and consumers, as they hopefully will have become more knowledgeable, considered and empowered in information searching and their individual consumption/ choices. This has multiplier effects in terms of fostering greater consumer sovereignty, economic efficiency and societal democratic maintenance and advancement. Hence, the extended case method contributes to the foundations for individual, economic and societal gain, beyond that of the traditional and more narrowly focused case study method.

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