***Building the Perfect Live Case – from Start to Finish in One Semester***

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*Abstract*

Critics contend that traditional business cases fail students. A possible answer to these failings is the live case, in which students provide solutions to a business’ current problems. However, evidence supporting the efficacy of live cases is incomplete. This article describes a semester project in which 29 senior marketing majors drafted and analyzed six live cases. At the conclusion of the semester, all 29 students provided feedback on the project. Students indicated that the project was rewarding and challenging. Their feedback is presented, along with a discussion of ways to improve the live-case experience.

**Key words**

Live case, case studies, marketing strategy, marketing management, semester projects

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**Introduction**

A case study is “an empirical inquiry that investigates a contemporary phenomenon within its real life context” (Yin 1994, p. 13). Case studies are among the most-popular means of teaching business students (Bridgman, Cummings, and McLaughlin, 2015). Advocates assert that “(c)ase studies bring undergraduate classes to life, sparking discussion about realistic business scenarios” (Harvard Business School, 2004, p. 2; cited in McCarthy and McCarthy, 2006, p. 201).

However, researchers have struggled in recent years to “satisfactorily justify the use of case research” because it lacks “critical realism” (Easton 2010). Detractors hold that most “(c)ase studies are unlike the business world in that the essential facts are preassembled and the reasonable alternative courses of action are often implied” (Kennedy, Lawton, and Walker, 2001, p. 147). In this way, case studies represent procedural knowledge by focusing on the rules or procedures for solving the problem, rather than conceptual knowledge or a connected web of knowledge (Hiebert and Lefevre, 1986, cited in de Jong and Ferguson-Hessler, 1996). Similarly, Lincoln states that traditional cases have given his students the “feeling that they were being asked to solve a marketing problem by looking through a foggy rear-view mirror of someone else’s car” (2006, p. 1). Instead, some of these critics advocate live cases. Simkins (2001) states that -

“A ‘live case’ is a case analysis that involves a current problem or issue that a company is investigating. The problem or issue has not been resolved and the company is seeking input from the students to assist them in making a management decision. … at the end of the live case analysis, students present their recommendations to the firm” (p. 2).

Live cases move students from passive to active learning, mandating deeper, more-integrative thinking. More specifically, each student acts as “researcher, petitioner, interviewer, negotiator, writer, editor, and of course, team member” (Bailey *et al*, 2005, p. 43). As Strauss (2011) put it, using live cases “engages and motivates students by providing real-world problems in a short time frame, and develops their creative problem solving, presentation, time management, and team work skills.” Rather than superficially following a pre-determined method for solving a case study, live cases offer the opportunity for deep integration of knowledge in that students must understand concepts and select among viable procedures to identify a solution (Star and Stylianides, 2013). This deep processing makes it possible for students to build expertise; they develop generalizations and abstractions to help them build a structure for solving problems, rather than relying on superficial heuristics, which easily can be misapplied (de Jong and Ferguson-Hessler, 1996).

For over forty years, scholars have used live cases to teach marketing (e.g., Christian, 1973). In recent years, scholars have published papers in which live cases were used to study a variety of business topics, including:

* Sustainability (Sroufe and Ramos, 2011),
* Operations management (Jones and Kerr, 2012),
* Finance (Cotter and Martin, 2000),
* Business ethics (service learning) (Flannery and Pragman, 2007), and
* Executive development (Culpin and Scott, 2011).

Despite their advantages, live cases are underused (Razzouk, Seitz, and Rizkallah, 2003); the substantial time required is the greatest perceived drawback (Hough, Shulock, and Thanner, 2014). Also, since live cases stretch students’ abilities, professors must keep students on track by providing frequent feedback (Abston and Vuong, 2017). Moreover, students complain that – due to insufficient contact with interviewees – they may have too little client information; in turn, clients may receive irrelevant solutions to their businesses’ problems (Corrigan and Craciun, 2012). Live cases have also been criticized for not being “generalizable to other settings because of the small-N problem” (Tsang 2013), making the extensive investment in time questionable.

After researching the complications of live-cases, we challenged ourselves by asking “Can we build a live-case project that both a) retains in-depth analyses and b) is feasible for students to complete in one semester?” We describe our resulting experience – successes, failures, and future plans – in the pages that follow.

**The Assignment - Details**

Twenty-nine students in a marketing capstone course began the semester by forming six groups. Then, group members used their interpersonal connections to identify businesspeople to interview. The professor-developed interview questions focused on the strategic challenges facing the businessperson’s firm. Students could earn up to 400 points for their live case projects, out of a possible total of 1000 points for the course as a whole.

For us, one of the most-challenging tasks was creating an interview guide. Because the students interviewed a diverse group of businesspeople, the questions had to be general enough to apply to any firm. In Spring Semester 2018, students asked interviewees the twenty-four interview questions in Table 1. The questions concern the firm’s internal and external environments and its strategy.

*See Table 1 in the Appendix*

Each group made an audio recording of the interview. Students then submitted the audio to the instructor to verify that the interview had taken place. Students used their recordings to 1) assess the firm’s strategic position, 2) list the firm’s future challenges, and 3) propose a solution to one of those challenges. This analysis matches how case analysts approach a traditional case study. Students submitted five short papers covering these issues. The five papers followed the steps in the strategic marketing process as outlined by Aaker (2013), the author of the course textbook. The five papers were –

1. **Micro (Internal) Environmental Influences***. –* Students explained the firm’s objectives, resources, mission, and degree of strategic planning.**This paper was** worth a maximum of 20 points (5 percent of project grade)
2. **Macro (External) Environmental Influences – Students explained the uncontrollable factors that could influence the firm’s performance. This paper was worth a maximum of 20 points** (5 percent of project grade)
3. **Target Market(s) & Marketing Mix – Students explained the firm’s current strategy. This paper was worth a maximum of 20 points** (5 percent of project grade)
4. **3 Marketing Problems / Challenges – Students identified at least 3 issues the firm needed to address. The instructor then helped the students identify which of these issues the students could help the firm solve or improve. This paper was worth a maximum of 70 points (17.5 percent of project grade)**
5. **Proposed (Initial) Solution – This paper was worth a maximum of 80 points (20 percent of project grade).**

The students finished submitting these papers about six weeks before the end of the term.

The instructor and the interviewee provided feedback on these initial strategic plans. The second discussion with the interviewee was also audio recorded and submitted to the instructor. Table 2 contains a summary of the areas covered by the second interview.

*See Table 2 in the Appendix*

During in-class presentations (15-20 minutes) at the course’s end, each group focused on its revised strategic plan.

**Method – Analyzing Student Feedback**

All 29 students commented on the project after they had completed their final exams. Students’ answers were anonymous. The instructor provided each student with a piece of paper, which contained all of the questions for the research. When the students completed the questions, the lone course grade remaining was the objectively-graded, multiple-choice final exam. At the time of their comments, students had already completed all work on the project.

First, the students answered two open-ended questions –

1. *What were the three most-valuable aspects of completing the semester project?*
2. *What three changes would most improve the semester project?*

Then, students completed 12 Likert-type items assessing features of the live-case project (1 = Strongly Disagree, 7 = Strongly Agree). We presented these items second, so that students’ exposure and answers to these items would not influence their open-ended responses to the valuable / needs-to-improve items.

*Coding & Data Analysis*

To examine responses to the open-ended items, we followed the suggestions developed in Saldana (2013). Coding data is an iterative process that allows themes to emerge as researchers’ understanding of the data improves. We read all of the responses twice and then devised five major categories for the “most-valuable” aspects of the project and four major categories for the most-needed changes to the project.

After agreeing on the major categories, two of us independently read and coded the students’ individual responses, noting which “belonged” in each category. (Outliers were not matched to any category). To ensure that our analyses were accurate, we analyzed the level of agreement in the two researchers’ codes by using Cohen’s kappa (Cohen, 1960). For the “Most-Valuable” aspects of the case, kappa was .767, which exceeds the recommended minimum of .6 and is classified as a “Good” score. For the “Areas for Improvement,” kappa was .914, which is classified as “Very Good” (the highest category available) (Landis and Koch, 1977).

**Results - Student Reactions to the Project**

*Most-Valuable Aspects*

Students listed five common elements of the live-case that they found valuable – 1) group aspects, 2) presentations, 3) strategic / critical thinking / problem solving, 4) real-world aspects / gathering inputs, and 5) the project structure.

*Areas for Improvement*

Four common themes emerged in the needs-to-improve answers – 1) no / few issues, 2) group issues, 3) interview issues, and 4) presentation issues. In regard to the first category, students either said that they had no issues at all or could think of no additional issues after listing one or two areas for improvement. For the “needs to improve” responses, 25 of 87 (28.7%) potential answers were left blank, whereas just 4 of the 87 (4.6%) were left blank for the positive aspects of the project.

**Table 3a – Most-Valuable Aspects of Semester Project**

|  |  |  |  |
| --- | --- | --- | --- |
| **Aspect** | **Times Recorded– Coder A** (% mentioned – of 29 students ) | **Times Recorded – Coder B**(% mentioned – of 29 students) | **Similar Research****Questions** |
| Group aspects | 21 (72.4%) | 22 (75.9%) | 3 |
| Presentations | 10 (34.5%) | 10 (34.5%) | 9, 10 |
| Strategic / Critical thinking / Problem Solving | 18 (62.1%) | 18 (62.1%) | 4, 5, 7, 9, 11, 12 |
| Real-World aspects / Gathering inputs | 25 (86.2%) | 25 (86.2%) | 1, 2, 8 |
| Project structure | 6 (20.7%) | 6 (20.7%) | 6 |
| Unclassified | 3 (10.3%) | 2 (6.9%) |  |

**Table 3b – Areas for Improvement in Semester Project**

|  |  |  |  |
| --- | --- | --- | --- |
| **Aspect** | **Times Recorded– Coder A** (% mentioned – of 29 students ) | **Times Recorded – Coder B**(% mentioned – of 29 students) | **Similar Research****Questions** |
| No / Few Issues | 6 (20.7%) | 6 (20.7%) |  |
| Group Issues | 16 (55.2%) | 17 (58.6%) | 3 |
| Interview Issues | 23 (79.3%) | 21 (72.4%) | 1, 2, 8 |
| Presentation Issues | 11 (37.9%) | 10 (34.5%) | 9, 10 |
| Unclassified | 6 (20.7%) | 8 (27.6%) |  |

After comparing the responses to the short answer and Likert items, we decided to discuss the students’ relevant short-answer comments when we discussed the Likert items. We made this choice to condense our discussion and to avoid the redundancy that a separate discussion of both sections would produce. On the whole, students’ remarks on the short-answer items pertained to the same issues raised by the Likert items.

**Table 4 – Student Assessments of Project – Spring 2018**

|  |  |  |  |
| --- | --- | --- | --- |
| Item # | Instructions - please circle the number that BEST indicates how strongly you agree or disagree with the statement *(1 = Strongly Disagree, 4 = Neutral, 7 = Strongly Agree)* | Mean | Standard Deviation |
| 1 | Working with a live interviewee was better than reading a case out of a book | 6.79 | 0.55 |
| 2 | Using the audio to write the reports helped me better connect the firm’s resources to our solution | 6.24 | 1.01 |
| 3 | Working in a group helped us devise a better plan | 6.43 | 0.82 |
| 4 | Submitting the project in small segments helped make our project better | 6.75 | 0.83 |
| 5 | The second interview helped us come up with a better plan | 6.21 | 1.18 |
| 6 | Planning our presentation helped improve our thinking | 6.18 | 0.97 |
| 7 | Our project would have been better if we had more information from our interviewee | 5.33 | 1.70 |
| 8 | Watching the video helped (or will help) improve my communication skills | 6.18 | 0.93 |
| 9 | After completing the project, I can now better see how the pieces of the firm’s strategy fit together | 6.39 | 0.77 |
| 10 | After completing the project, I feel more confident that I could create a good marketing strategy for a real business | 6.39 | 0.62 |
| 11 | The project was challenging | 5.14 | 1.30 |
| 12 | The project made me use skills that I haven’t used in other classes | 5.89 | 1.11 |

*N = 29 for items 1 & 2; N = 28 for items 3-6 and 8-12 N = 27 for item 7*

*Process Items – Interview, Group Work, and Challenges*

*RQ1 – Did students agree that “Working with a live interviewee was better than reading a case out of a book”?*

Working with a businessperson in “real time” is one of the defining elements of a live case. For RQ1, students reported positive impressions of the interviews that they conducted relative to the merits of traditional “textbook” cases. Of the 29 responses, 25 recorded 7s (“Strongly Agree”) with a mean score of 6.79.

Likewise, in the short-answer items, twenty-five students (86.2%) noted that contact with businesspeople and the inputs they provided to the project were valuable. Three students specifically commented that conducting the interview was valuable. One wrote that “Having a *live* (emphasis in original) interview helped answer all questions and better our project.” Another noted that “The chance to actually speak with a person, and not just read about them was awesome.” Finally, a student wrote that he valued “Providing useful, fully-vetted ideas and insight to my Dad’s business.”

The negatives that students reported pertained to the interview questions asked in the standard interview guide (please see the discussion of RQ2). However, some of the open-ended responses did indicate problems with the interview process. Two students remarked that it would have been better if the entire group had interviewed the businessperson. Another student wrote that the interview was difficult to arrange.

*RQ2 – Did students agree that “Our project would have been better if we had more information from our interviewee”?*

In the “Areas-for-improvement” open-ended items, more than twenty students expressed concerns related to the interviews, which was the most-commonly-cited concern about the project. Of those students, nine listed concerns about the “standard” interview questions. One student wished that we had provided “Better questions to ask. Some of those questions weren’t useful to the company my group picked.” Another was more specific in suggesting “More questions related to marketing problems in the 1st interview guide.” A third student suggested a possible solution: “Stress the importance of the interview questions. Tell them [students] to come up with a few of their own even. I wish we had more info during the interview.”

Similarly, the Likert-type question above asks whether the students thought that having more information from their interviewees would have improved their analyses. The mean score was 5.33. So, students tended to agree, but not as strongly as they did with some of the items.

Given that the interview questions were the most-commonly-cited area for improvement, we made changes to the project that we detail in the conclusion.

*RQ3 – Did students agree that “Working in a group helped us devise a better plan”?*

While not unique to live-cases, group work is a common concern for faculty using live-case projects (Abston & Vuong 2017; Roth & Smith 2009). Therefore, students submitted two assessments of their fellow group members to prevent “free-riding.” Each student completed a midterm review of group members in early March. I reserved the right to kick any “non-contributing” students out of their groups. These students would then have to complete the final oral reports on their own. The second peer assessment was an ex-post review and it was included – in part – to deter possible “free-rider” issues. Each of the group assessments was worth 20 points (5 percent of the total course grade). A small percentage of the students reported problems on these assessments, but most students reported that the division of labor within their groups was equitable. Likewise, responses to the Likert item showed that students were positive on the benefits of group interaction (mean = 6.43).

In the open-ended items, group-related comments were cited as a valuable aspect of the project by more than twenty students but were also the second-most-cited area for improvement (by more than fifteen students). Students remarked that work in teams was a valuable professional skill and that it was enjoyable. One woman wrote – “Group work – it suck [sic] almost 100% in an academic setting, but you need it to prepare for real jobs in which you need to be able to work w/ and sync deadlines w/ other co-workers.” Likewise, another student remarked that “Brainstorming ideas with a group of people helps you think outside of what an individual normally would.”

The concerns expressed regarding the group work will be familiar to veteran faculty members.

The biggest reported issues were unequal division of labor and discomfort with the mandatory peer evaluations.

*RQ4 – Did students agree that “The project made me use skills that I haven’t used in other classes”?*

*RQ5 – Did students agree that “The project was challenging”?*

Critical thinking (CT) involves “…analysis, evaluation, and inference … [advocates of CT maintain that] purposeful, reflective judgment, increases the chances of producing a logical conclusion to an argument or solution to a problem” (Dwyer, Boswell, and Elliott 2015, p. 260). Scholars maintain that – in order to be successful – business students and executives must be able to think critically (Deane and Borg, 2011; Whitten 2011). Scholars assert that lives cases help students develop their critical-thinking skills (McWilliams and Nahavandi, 2006).

We wanted to see whether students felt that the live cases caused them to use abilities that had not been tapped in other schoolwork (RQ4) and whether they felt that they had been challenged (RQ5). Students generally agreed with RQ4, but not as strongly as they had agreed with some items (mean = 5.89). The lower agreement is somewhat intuitive. Students take both marketing strategy and a business policy course during their last semester. Both courses focus on strategy and use case analyses. A more-refined measure is needed to determine whether marketing’s live case contributes in ways that business policy’s traditional cases do not.

For RQ5, students indicated that the project was challenging, but agreed less strongly than they did with any of the other eleven Likert items (mean = 5.14). With five “mini-papers” to draft and with up to six people in each group, perhaps the effort required for each student was not high. Certainly, we could add to the project requirements, though such a requirement would also increase our grading.

Given the relatively-low levels of agreement, we were particularly interested in students’ comments regarding critical thinking. Eighteen students (62.1%) stated that the strategic aspects of the project were valuable. For instance, one student remarked that “I actually knew what I was talking about. I knew more about how the corp. worked and some of its important functions.” Another student wrote that the live case helped her “understand firms better and how they come up with solutions to problems that involve the marketing mix.” On the whole, the majority of the students felt that the case had challenged them, causing them to take on unfamiliar tasks. By building their conceptual web of information and addressing the problem in depth, the experience helped structure the students’ knowledge to build expertise (De Jong and Ferguson-Hessler, 1996). *Deliverables Items – Structure, Interviews, and Presentations*

*RQ6 – Did students agree that “Submitting the project in small segments helped make our project better”?*

Groups had multiple due dates to a) encourage work throughout the semester, b) provide mid-stream feedback – and allow for course correction, and c) decrease our end-of-semester grading. Students also had (at minimum) two chances to interact with interviewees; client interaction is a distinct benefit of live cases that is nearly impossible in the traditional-case format.

The Likert item reveals that the class was positive about the project format (mean = 6.75). On the short-answer items, six students (20.7%) referenced the project’s structure as a positive; none mentioned it as a negative. By one student’s estimation, the multiple due dates worked - “The specific outline and due dates helped keep everyone in line and on time.” Another student liked “The incremental steps and not doing all of it at once.”

*RQ7 – Did students agree that “Using the audio to write the reports helped me better connect the firm’s resources to our solution”?*

*RQ8 – Did students agree that “The second interview helped us come up with a better plan”?*

For students, the interviews were both a) evidence for their case analyses and b) deliverables for which they earned grades. Too often in the past, students conducted interviews but did not use them when crafting their strategies. Therefore, in Spring 2018, the project required each group to support its strategy with a minimum of eight direct quotes from their audio recordings. The idea was that the interview revealed the firm’s available resources; the solution showed that – through critical thinking - the students could build a strategic plan around those resources.

For RQ7, students agreed that the audio was helpful (mean score of 6.24), but answers were varied (standard deviation of 1.01). Moreover, it was our subjective impression that quotes improved the Spring 2018 projects and that the students’ thinking showed more depth than we had seen in previous semesters.

In regard to RQ8, Yin (2018) asserts that researchers can improve their cases by having interviewees assess the case researchers’ work. Therefore, the second interaction between student and interviewee provides the student with an opportunity to revise the initial plan.

In Spring 2018, the second interviews revealed that students often had a) misinterpreted the interviewee’s initial remarks or b) proposed solutions that were unrealistic for the interviewee’s business. This iterative, interactive process is not possible in the traditional approach to case studies. As a result, the revised plans at the end of the term were often quite different – and better - than were the initial plans.

Students were positive on the second interview’s value (mean = 6.21), though this level of agreement is lower than it was on six other items. Some students might have been less positive because some of the initial marketing strategies required little revision.

Though the second interview did not emerge as a category in the students’ open-ended comments, a small number of students referenced it. One said that the second interview was unhelpful. Another said that her group could have used the second interview more if it had been due earlier in the semester. Finally, two students said that they would have liked to have done a *third* interview with their clients.

*RQ9 – Did students agree that “Planning our presentation helped improve our thinking”?*

Presentations are not particular to live cases, but do provide students with opportunities to show that they can use critical thinking and draw on evidence to create a strategic plan. The students’ instructions for the presentations were to explain how and why their plans had changed since the initial paper. Again, answers to the Likert items show that students were positive about planning their presentations (mean = 6.18).

Ten students (34.5%) referenced issues pertaining to the presentations as one of the project’s “most-valuable” aspects. Several students remarked that presenting was valuable – “The presentation – again prep for real career skills is you make it much more serious than some classes do so that’s good.”

However, about ten students also remarked that improvements in the presentations were possible. To our surprise, two students stated that their projects would have been better had they written a second paper and not just presented their revised plans. One student wrote “Wow, can’t believe I just suggested MORE work. Ha ha!” Also, two students stated that they would have liked more direction in how to structure the presentation.

*Takeaway Items – Did Students Gain from the Project?*

*RQ10 – Did students agree that “Watching the video helped (or will help) improve my communication skills”?*

The stated goal of the marketing program at our university is to prepare marketing majors for entry-level positions after graduation. The live-case presentations offered an opportunity to practice a skill that is commonly needed in the business world (Maes, Weldy, and Icenogle, 1997). We arranged for an MBA student to record audio and video of the presentations. Then, we assigned students to watch the recording of their group and to assess their presentations in an individual assignment. On the whole, students were positive about watching the presentations (mean = 6.18).

In the open-ended items, three students mentioned that watching the video provided good feedback. One wrote that “Although cringe worthy, watching the video on oral presentation helped reflect on presenting habits.” On the other hand, one student wrote that she disliked watching the recording – though she did not specify why.

*RQ11 – Did students agree that “After completing the project, I can now better see how the pieces of the firm’s strategy fit together”?*

Webster (1992) likens forming a marketing strategy to solving a puzzle. Each strategic “piece” must succeed not only on its own merits, but it must also work in conjunction with the other elements of the strategy. Crafting strategy, therefore, requires students to think about each puzzle piece (i.e., the tactics that make the strategy work) and the big picture that those pieces combine to create (i.e., the strategy). Students are faced with one of the biggest challenges in business (Holm 2006), transitioning from tactical thinking to big-picture strategy.

Live cases help improve students’ capacity for strategic thinking. Students must develop a network of conceptual knowledge to help them solve problems, not just memorize formulae or follow a standard procedure (Star and Stylianides, 2013). Also, strategic thinking skills are in demand by employers (Jerrard 2005). Students reported that the project did help understand firm strategy (mean = 6.39). Eighteen students (62.1%) stated that the strategic aspects of the project were valuable. Two students used the words “critical thinking” when discussing the most-valuable aspects of the project. (See also the discussion of RQ5, which contains students’ comments regarding the valuable strategic aspects of the project).

*RQ12 – Did students agree that “After completing the project, I feel more confident that I could create a good marketing strategy for a real business”?*

RQ12 was a global assessment of whether the project helped students improve their marketing strategy skills. Again, students were positive; the mean response was 6.39 with no score lower than 5. Several students stated that the live-case project helped them develop new skills. Please see the discussions pertaining to RQ4, RQ9, RQ10, and RQ11 for students’ comments regarding whether and how the project helped them improve their business skills.

Few comments specifically addressed students’ confidence levels regarding whether they could create a strategy, but students did mention creating strategies when discussing valuable aspects of the project. For instance, one wrote “…having to look at an actual company on your own and apply lecture components in your own way is I feel very beneficial and interesting.” Another stated that “The project helped me think outside of the box and come up with plans to help market a company.”

**Discussion – Notes from a Moving Train**

What did we gain from adopting the live-case format? Our impression was that – taken as a whole – students were more engaged when working on a live case. We received more questions from student groups. Students often mentioned that they were more motivated because they knew that an actual businessperson would receive the results. We agreed with the students’ opinions that the live cases caused them to think more strategically and understand more of the real world. Last, (though the students did not mention it) we liked that developing an original live case precluded students from finding solutions to the case online.

What aspects of the live case were disappointing? In what ways did the live case fail to improve the case experience? In some ways, we found that live cases might help “treat” (i.e., decrease) the problems associated with traditional cases, but that live cases could not “cure” (i.e., eliminate) such problems. The obvious drawback was group issues, as discussed in regard to the survey results. Another issue (not mentioned by the students) is that groups often seemed overwhelmed by the live case analysis and end up settling for mediocre solutions. (Though our assessment is that – when using live cases – students were slightly less likely to “settle for mediocrity”). Finally, a good live-case analysis is time intensive. Students spend a lot of time on multiple solutions to the same problem. This is a tradeoff as compared to traditional (printed) cases in which students in a one-semester course can analyze multiple cases that require them to address a range of strategic issues.

As with any research, our study is subject to limitations. Some of our questions might have influenced students’ responses. For instance, we simply asked students for the three most-valuable and “most-improvable” aspects of the live case. Perhaps our questions would have been better if we had first asked them a) whether the live case was valuable and b) improvable. Likewise, responses to Research Question 9 (“Planning our presentation helped improve our thinking”) could refer to multiple aspects of the project. Readers should bear these potential limitations in mind.

*Interview Format*

After the semester, we assessed our live-case project. One concern centered on workload; perhaps having each group find its own interviewee, conduct an interview, identify strategic problems, and finally solve those problems was too ambitious. We feared that the quantity of tasks required of students came at the expense of depth of understanding, which is one of the most-often-cited benefits of case studies (Halinen and Törnroos, 2005). Researchers caution that a focus on such rote tasks undermine the potential for building problem schemata (De Jong and Ferguson-Hessler, 1996).

Likewise, the standard interview questions frustrated many students. Though our interview questions applied to any firm, no set of interview questions could address the strategic challenges facing all businesspeople. Again, we worried that our format discouraged depth. The fact that students’ agreement that the project was challenging (RQ5) was the lowest level of agreement for the 12 Likert items tended to reinforce our concerns.

Allowing each student group to draft its own interview guide would compound the workload problem by adding another major assignment to a tight schedule. Instead, for Fall Semester 2018, we selected one client as the subject of all student projects. Before the semester began, we interviewed the client and posted a video of the interview to a shared “cloud” drive. Hong et al. (2018) found that video lectures result in better learning outcomes for conceptual or declarative knowledge; posting our client interviews potentially offers the students greater opportunity for linking information pieces to help them solve the client’s challenge. Under the revised format, students are still able to interact with the interviewee by emailing follow-up questions.

Using a single firm for the live case shifted the work tasks; students spend their time analyzing the case, not obtaining background information. This eliminates the papers detailing the firm’s internal environment, external environment, and strategy. Too often, these papers were “book reports” – blow-by-blow accounts of the interviews - as opposed to thoughtful, in-depth analyses.

*Group Issues*

Students cited group interactions both as a valuable aspect of the project and as an aspect that most needed improvement. Other authors have cited interpersonal conflict as one of the most-challenging aspects of student groups (McCorkle *et al.,* 1999; Hansen, 2010). Students who experienced group problems were particularly concerned about “free riding” group members.

For Fall 2018, each project paper requires groups to detail the contributions of each group member. Also, we specified that each group member should be given an opportunity to participate in each paper. We hope that assessing each student’s contribution “early and often” will act as the ounce of prevention that will prevent many “free-rider” issues.

*Elevator Pitch*

Students’ initial plans - and the feedback obtained on those plans from interviewees – greatly improved the live cases in Spring 2018. Students agreed that the second interview (in which they discussed their initial plans) helped improve their projects (RQ8). As their instructors, we also felt that the students made huge strides between their first and second submissions.

In an effort to build on this strength, we added a 5-minute elevator pitch – a preliminary solution - to the class for Fall 2018. In a study of accounting students, Cameron and Dickfos (2013) found three benefits of elevator pitches – 1) students could more-accurately gauge how well they spoke in public, 2) students’ feelings of self-efficacy improved, and 3) students better understood the relevance of oral communication to professional success. Also, the pitch gives the students an additional chance to interact with the client, which helped ameliorate our concerns that eliminating the interview requirement would take away a valuable experience.

For Fall 2018, we adopted a student’s suggestion and invited the interviewee to attend the presentations. Our Fall 2018 interviewee attended the elevator pitches and the watched videos of the final, revised project presentations. After Fall Semester 2018, we followed up with the interviewee. We learned that the interviewee was very positive about the live-case experience and that – in his opinion - his business had made great strides as a result of his participation in the live case. At the same time, our cumulative experience with live cases led us to consider additional refinements, such as 1) the heavy workload requiring the professors to record an interview before the start of the semester and 2) the large amount of grading created by requiring the students to submit the projects in several small assignments. Moving forward, we began to cast about for improvement on these two issues.

*Limitations*

While we tried to produce valid results that would generalize across a range of settings, readers should be cautious in interpreting our study. Students had an opportunity to provide anonymous feedback. But we do not know if the students felt comfortable enough to be candid. They may have felt that any negative responses could be “held against them.” Also, as noted, our instrument presented the open-ended items first and the Likert-type items second. Our hope was that students would name the positive and negative aspects of the project without considering the information we wanted them to evaluate in the Likert-type items. However, we cannot be certain that students answered the items in order. If students skipped ahead, the material in the Likert-type items may have influenced their answers to the open-ended questions.

*Perpetual Beta*

The final suggestion is perhaps the most important. Live-case instructors should collect student opinions on the live-case assignment each semester. While feedback varies in utility, students’ past assessments have improved the project many times and are the foundation of our “Perpetual Beta” approach to live-case analysis.

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***Appendix***

**Table 1 - Interview Guide – Live Case Project**

**Instructions:** Please 1) ask all questions, 2) pay attention to answers & 3) and follow up with additional questions that occur to you.

**Section A -** *External Analysis,**Customers, & Value Propositions*

1. What types of customers do you serve? Are there different types of customers who buy from you?
2. Why do customers buy from your business? Do people buy for the same reason, or are there different reasons?
3. What sorts of input do you get from customers about your business?
4. How well does your business use customer input when making plans?
5. What other challenges do have in dealing with customers? Why are these important?

**Section B -** *Competitor Analysis*

1. Who are your competitors? Please describe them.
2. How strong do you think your business is relative to these competitors?
3. What can your firm do – if anything – that your competitors cannot do?
4. How do you see competition changing in the future?
5. What other challenges do you face from competitors? Why are these important?

**Section C -** *Environmental Analysis & Strategic Uncertainty*

1. What are your business’ biggest challenges likely to be in the future?
2. How well do you think your business will meet these challenges?
3. What is the biggest uncertainty that you face and how are you dealing with it?
4. What factors other than competitors and customers influence the success of your business? How do these factors affect your firm’s performance? *(If your interviewee is unclear on what this question means, you could reference factors such as the economy, technology, government, & society).*

**Section D -** *Internal Analysis*

1. How well is your business performing right now?
2. How does your business attain needed resources?
3. What resource do you have that are important to making your business work? Why are these resources important?
4. What sorts of resources does your business need right now that it doesn’t have? What would it take to attain these resources?
5. What resources does your business not need right now that it might need in the future? What will it take to attain these resources?

**Section E -** *Creating Advantage*

1. Is the amount of planning that your business does too much / too little / or about right?

Why do you feel that way?

1. What parts of the planning process at your business work?
2. What part of the planning process at your business could be improved?
3. How well does your business implement the plans that it makes?
4. Looking ahead, what is the most-important thing that you need to do to stay ahead of competitors? Why is this important?

*Please make sure that you thank the person for speaking with you. A “Thank You” note is always a nice touch.*

**Table 2 – Summary of Second Interview Questions**

The purpose of the follow-up interview is for you to get feedback from the person you interviewed. You will discuss what you have written in your paper with him or her.

1. **Firm’s Present Position** –

**1)** Explain to your interviewee how you think the firm is doing. Then ask the interviewee ***“How do you think your firm is doing? What did we get right and wrong?”***

**2)** Tell the interviewee what you have identified as key issues that the firm is facing. Then ask ***“How important the issues we’ve identified to your firm? Are there other key issues that we’ve missed?”***

1. **Tell the firm which problem you are going to discuss in the paper.** Then ask -
2. ***How significant is this problem to your firm? If you solved this problem, how much would solving it influence your profits?***
3. ***If your firm focuses on this issue, how likely would it be that you would solve this problem? Why do you feel this way?***

C. **Specifics –**

1) Explain the actions that the firm should take to reach its objectives. Then ask ***“How effective do you think these actions would be at helping your firm reaching the objectives? Why do you feel this way?”***

Then ask ***“What other actions would help you reach the objective? How would these actions help?”***

2) Explain the resources the firm could use to accomplish the objectives. Then ask ***“Would these resources be sufficient to accomplish the objectives? Why or why not? Does your firm have access to those resources?”***

Then ***“What other resources would be helpful to reach the objectives? What are those resources? Does your firm have access to those resources?***

3) Explain how you think your strategy will impact the firm’s customers. Then ask ***“How do you think this strategy would influence your customers? Why do you feel that way?”***

4) Explain how long you think your plan will take. Then ask ***“How long do you think it would take to accomplish the objective? Why do you feel this way?”***

5) Ask your interviewee if he or she has any other thoughts.

**Thank the interviewee for his or her time**