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AN EXAMINATION OF BUSINESS CASE METHODOLOGY: PEDAGOGICAL SYNERGIES FROM TWO DISCIPLINES

ABSTRACT

This article presents a project that critically examines the value of business cases as a pedagogical tool for teaching business language. The project comprised research and video interviews conducted over a two-year period, drawing from knowledge, disciplinary skill sets, and experience of faculty and students in the fields of international business and foreign language and culture pedagogy. Following a brief introduction to business case methodology and the project's initiation, the authors describe the project outcome: the e-Handbook, an on-line video-based guide to teaching with business cases. The article culminates in an examination of best practices and critical perspectives within the three areas of definitions, benefits, and strategies presented in the Handbook. The uniqueness of this project stems from its interdisciplinary approach, which promotes the cross-fertilization between languages and business.

In teaching business language, we frequently turn to business experts to inform, support, or expand our understanding and teaching of business content. Grosse and King (2005) note that business faculty can be "valuable allies for business language faculty" by assisting with locating course resources, identifying guest speakers, or explaining unfamiliar business concepts (46). While teaching with business cases, for example, language faculty often must acknowledge a lack of training in the area of business content, and not wishing to ignore or simply accept this potential disadvantage, they partner with MBA students or business faculty to assist them in writing cases to use in class (e.g., Takami, 2008). Alternatively, language faculty sometimes choose to place the focus of their teaching with cases squarely on language skill development (e.g., Ulrich, 2000), perhaps missing out on opportunities to draw on students' critical thinking skills in business content areas (Egbert and Maxim, 1998). In contrast, it is less common for business faculty to consult

with language/culture experts to enrich their pedagogical approaches or their knowledge of language and culture, in spite of the fact that such consultation would unquestionably broaden their—and their students'—comprehension of cross-cultural or language-based misunderstandings in a business context. This article discusses a project that critically examined the pedagogical value of business cases, with the aim of synergizing perspectives from the two disciplines of international business and foreign language and culture pedagogy, drawing from each other's knowledge and disciplinary skill sets. The project, entitled "Business Cases in the Foreign Language Classroom: Critical Perspectives and Best Practices across Disciplines" was based on research and interviews conducted over a two-year period. While the project was originally developed primarily with business language faculty in mind, an equally important goal was to open the lines of communication between these two disciplines. For the purpose of this article, we focus on business language courses; however, the insights gained in the project are applicable to business courses, and we will address this in a future article.

Before we describe the project in more detail, we address several reasons why cases merit attention for teaching business and language students in the twenty-first century. We then present the project itself, its genesis, execution, and the tangible outcome: a valuable video-based resource for helping those unfamiliar with cases to feel more comfortable using them and for broadening the perspective of those who already do teach with cases.

The Case for Teaching with Business Case Studies in the Twenty-First Century

Harvard Business School is considered by many to constitute the cradle of modern business case pedagogy. It modeled its approach on the prestigious Harvard Law School case method and started developing business cases in the early 1920s in order to educate managers to become practical problem solvers (Forman and Rymer, 1999). While business cases have been an integral part of managerial education in business schools around the US for many years, their pedagogical benefits are increasing with the growing complexities resulting from globalization. The recent financial crisis and its aftermath have underscored the need for leaders who are less reliant on categorical thinking patterns and more openly explorative in their approaches to executive decision making. As the global business arena becomes less predictable, companies increasingly face situations that require managers to make high-stakes decisions based on incomplete and at times fluid information, and to reconcile diverging narratives into meaningful and cohesive contexts. A good business

case replicates precisely such managerial scenarios and enables the students to experiment and practice managerial tasks in a dynamic, yet safe, environment, allowing educators to prepare students to navigate multiple levels of meaning in order to make sound corporate decisions. Such multilayered interpretive skills are very familiar to language learners, who recognize different spheres of meaning and contexts by virtue of extensive exposure to the ambiguities of language meaning, and to the unpredictability of cultural practices, and through their training in the analysis of literature typical in upper-level language courses. The study of business cases encourages them to exploit these skills while increasing their comprehension of the content and context of business, ultimately making them more competitive in a tough job market, and making the US more competitive worldwide.

The use of cases is not new to language teaching. When discussing the advantages of using cases for teaching business language, some language scholars note the motivational potential of interacting in a real-world business scenario (Federico, 1996; Piotrowski, 1982), with the opportunity to delve into cultural differences (Ainsworth, 2005) or develop intercultural communication skills (Witte, 1999). Others emphasize the contrasting goals of teaching cases to business students and to language students rather than commonalities. To them, the distinctive learning goals of language learners affect not only the selection of the case to be taught but also the approaches used to teach the case (Takami, 2008; Yuan, 2006), thereby giving concrete language skills development a leading role. According to Ulrich (2000), language activities constitute "the key objectives of the foreign language or ESL lesson based on the case study," and the language instructor should focus on developing students' business communication skills, whereas the task of "teaching business concepts remains in the hands of the business faculty" (230). Our project, on the other hand, explores whether it is possible to formulate a balanced approach, one that also moves us toward comfortably teaching business concepts within business cases, so that language students can reap all potential benefits of using cases.

Background of the Project

Our project was inspired by two workshops. In April 2008 the George Washington University CIBER (GW-CIBER) sponsored a workshop to introduce language faculty to using business cases in the business language classroom. In that workshop, a business professor presented two cases to participants: 25 language instructors were placed in the role of business students to help them gain insight into the dynamics and authenticity of this mainstream

business school methodology. At the conclusion of the workshop, participants discussed how business cases can be implemented in the language classroom, for instance the benefits and challenges of using this approach. Building on the success of this event, we scheduled a follow-up seminar for fall 2008, to teach language faculty how to develop shorter cases for their business language courses. The positive response to these events reflects not only the great interest in this topic but also the need for support to gain the necessary skills to teach with cases.

During these workshops, it immediately became apparent that there is a clear affinity between this frequently used methodology for teaching business and many common approaches in foreign language pedagogy. This affinity means that foreign language faculty, given the appropriate introduction to case studies, could likely make productive use of this tool, drawing heavily on their own expertise and training. This could, in turn, be valuable to business faculty teaching with cases. With these advantages in mind, we designed and proposed a project to fill the need for a resource to introduce language faculty to this methodology, incorporating input from both fields through secondary literature as well as interviews with faculty from international business and languages to uncover perspectives and practices with the business case methodology.

The "Critical Perspectives and Best Practices" Project

With the goal of creating a resource that would help teachers better understand the value of teaching with cases and ease instructors into using them in their own courses, we turned to the experts who have been using cases themselves. The bulk of the project outcome, our "e-Handbook on Teaching with Business Cases," is based on video-taped interviews with faculty who answered a wide array of questions that revealed their "critical perspectives and best practices." Through the voices of the interviewees, the e-Handbook walks users through key issues in teaching with cases, from definitions of business cases to concrete advice for those teaching with cases for the first time. It also provides links to resources for teaching with business cases as well as references to secondary literature on their use. It can serve both as an introduction to the concept of teaching with cases and as a resource packet for those already using them.[1]

[1] The "GW-CIBER e-Handbook on Teaching with Business Cases" is available online through the GW-CIBER Business Languages website: <http://business.gwu.edu/CIBER/BusinessLanguage/BusinessLanguageHome.html>. Additional valuable business case resources, including links to case providers, are offered at this site.

To be sure, similar video-based resources offering techniques or tools for teaching with cases are available through some business school websites (see e.g., Harvard Business School's *Participant-Centered Learning and the Case Method*); however, we have found none that offers perspectives from teachers of foreign languages. Thus, for our project, instead of turning exclusively to the business faculty, we interviewed "case experts" from business language faculty as well. We considered this to be a crucial factor for empowering language faculty by hearing from role models and from those who deal with similar issues or questions relating to language skills development. At the same time, we felt it was valuable for language faculty to hear not only from their own colleagues but also from the business side, to show that methods and content were more accessible than they might have imagined. A corollary goal was that business faculty, even if familiar with using case studies, could also gain from this resource by hearing the language faculty's perspective.

Our project is unique not only because of its synthesis of expertise and experience from teachers across two fields but also because of its inclusion of input from students. Mid-way through the project, we made the decision to include the student perspective, adding to our interview list students from business and language courses where cases had been used. This decision grew from the fact that all faculty interviewees stressed the learner-centeredness of teaching with cases, making it clear that the students' view of their own role in the learning process could provide useful input into how to heighten that experience. A total of 30 people were interviewed (13 faculty and 17 students).

The questions posed explored interviewees' prior work with business cases, in order to extract their insights and advice. Interviewees were encouraged to speak directly from their own experience, expressing what they truly believed rather than giving textbook-based formulations. This approach put interviewees at ease and resulted in a conversational style, with personal stories and examples, which is simultaneously pleasant to hear and conducive to learning. In the sections below, we present a selection of responses in the three areas of definitions, benefits, and strategies, while elucidating how these perspectives, sometimes overlapping and sometimes contrasting, provide a larger critical scope to this teaching method.

DEFINITIONS

Countless definitions of the term "business case" can be found in articles and textbooks. According to Leenders, Mauffette-Leenders, and Erskine (2001) for example, "A case is a description of an actual situation, commonly involving a

decision, a challenge, an opportunity, a problem, or an issue faced by a person or persons in an organization" (3). Piotrowski (1982) defines a case as "simply a record of a business issue which has been faced by business executives, together with the facts, opinions, and prejudices upon which the executive decisions had to depend" (230). Like these definitions, the interviewees' personal definitions contained similarities. In terms of the commonalities, most noted that a business case is a text describing a problem, typically telling about factors that contribute to a decision that some entity (a company or a manager in a company) had to make. At the same time, one business professor noted, "It is really important that we are not too much prisoners of facts and reality when we use cases. We really need to move from the use of a case as a description of reality to the use of a case as a platform for cognition."

Interviewees from both business and language conceived of the case not merely as a text but as a story:

> For me a business case is a story, a story that can be real or fictional and that involves several different levels of analysis, so it can be about an individual manager, it can be about a company, it can be about an industry, it can be about a country or it can be about how countries relate to one another in terms of business. (Business professor)

> A business case is essentially just a short story, a short story that may or may not have an ending and if it doesn't have an ending, the students will be required to supply the ending. That's what a business case is. And instead of having characters that are made up out of literature, it has characters that are involved in some sort of business activities. (Language professor)

One student picked up on this parallel as well—"It's like reading a book and stopping right at the climax. How does it end?"—accentuating his awareness of the learners' responsibility to supply the conclusion. In a similar light, one business faculty member used the metaphor of the case as detective novel: both present a puzzle to be solved, providing the "clues," that is, facts, events, and key people. He was quick to point out the critical difference that cases have more than one solution: "The last thing we want is for students to believe that for any problem there is one solution. We would rather say that life is full of problems, full of questions, but that we also want them to think beyond the first solution." A language professor using terms like "protagonist" in his definition drew direct parallels to literary analysis, a familiar tool to most foreign language faculty. Greenhalgh (2007) notes that in teaching business, "the dominant, scientific view of cases is that they are neutral descriptions

of real-life business problems, subject to rigorous analysis," yet she espouses treating cases also from a literary perspective as art, "incomplete and natural narratives, open to multiple and diverse interpretations" (181).

The students' definitions generally echoed those of faculty interviewees. They also defined a business case as the presentation of a "problem" or "situation" faced by a company, with additional information that can help lead to a decision or solution, as in the following: "A situation given to students that describes a real-world case in which a problem in a business needed to be solved by real employees and sort of assigns that circumstance to the students." As evidenced in this sample definition, students placed prominent emphasis on authenticity, the fact that cases had to do with real companies and real people making decisions. To them, the reality of the case gives purpose to the learning experience "extending the material from out of the classroom setting into reality" so that learning is no longer "just on paper" but rather "it comes to life, and lives because it's an actual company . . . who went through the actual things that you've been learning about." Using real cases makes them potentially more interesting to students than dry factual information. According to one business professor, this heightened level of interest leads to "better learning," which is "more likely to be retained."

Benefits

Student and faculty interviewees alike saw numerous specific advantages to the business case methodology. Just as they stressed the importance of the "reality" in their definitions of business cases, students noted as a benefit that cases force them to mimic real-life decision-making. They point out that working with cases actually causes an "adrenalin rush" due to a palpable pressure to reach a good decision. Coupled with role play or simulation activities, business cases have students "step into the role of the decision maker so that they become intimately involved in real-world situations" (Ainsworth, 2005, 46) where they "analyze and solve actual business dilemmas" (Federico, 1996, 2). Several interviewees identified the role-playing element as an advantage in learning with cases in that it raises the level of motivation. As one student put it, "I think anytime that you introduce something that is not theoretical into the classroom it gets students motivated . . . It's a perfect way to get students really interested in a real life project, because it's not theoretical; people's jobs are on the line."

Like the authenticity of the content, the authenticity of the task of "solving" the case was identified by students as a benefit, in that it connected a real-world assignment with the real-world problems presented in the case:

> [Business cases] helped link the theory of what we were learning to the actual real world. I think that sometimes liberal arts educations are missing that link, and it makes you think about how much pressure there is in the business world. Because when you're actually having to present and defend these ideas, you really want to be as much of an expert as you can on a given topic. So I think it taught me how to present ideas more clearly and define what it was I wanted to get through in my presentation, especially when there wasn't a lot of time to do so.

This not only gave them the feeling that they were experiencing what it would be like on the job ("It's like working somewhere") but also a sense of ownership of their responsibility in completing the task. The student input on this point underscores Leenders, Mauffette-Leenders, and Erskine's claim that by their very definition, cases must be "real" in order to be successful, and moreover, "the moment the student starts doubting the reality of the situation described, his or her ability to give the case full attention and to take the task seriously diminishes" (2001, 5). On a similar note, one student drew attention to the contrast between using business cases and using typical textbook materials, again noting the importance of the authenticity of the task: "The textbook is sectional but life is not; you never approach a business and say, 'Only the finance department is going to focus on how we are going to expand.'"

Rather than being required to find a single, correct solution, students reap the benefit of having to work as problem-solvers. In other words, cases help students develop critical-thinking skills as opposed to merely "accumulating repertoires of solutions" that they can then apply to business problems (Booth et al., 2000, 65). What a company or decision-maker actually did in any given case is therefore not paramount; instead, students devise their own solution based on their knowledge and creativity (Federico, 1996). One business faculty member puts it this way:

> I tell my students, "You are not allowed to go out and research in the newspapers what they did because ultimately it doesn't matter." Sometimes people make mistakes; companies don't always choose the right decisions, but what's more important to me is that the students sit down and look at the information in the case, and be able to glean the wheat from the chaff: What is the information in the case that's really critical to the decision that needs to be taken and what's really extra and extraneous, or even contradictory, and glean that out. Because that is a skill that is very hard to teach in any other way than through some sort of business case simulation, but it's a critical one for business managers.

This statement underscores the value of the process students follow in order to solve a business case, placing the focus on the skills students develop while doing the case-related activities rather than solely on any specific anticipated outcome or product.

Such analysis and problem-solving "requires the demonstration of vocabulary and grammatical comprehension" (Federico, 1996, 3), and language faculty noted that cases indeed give opportunities to develop language skills. Vocabulary-building within the case content area was key for faculty ("The skill that we work on first and foremost is vocabulary-building. They need to have that technical vocabulary"). Students saw that business cases introduce them to words that are not necessarily taught in any other language course, but that were nevertheless "transferable to other contexts." Interestingly, one business faculty member pointed out that vocabulary development works particularly well with cases, since it sets lexical items to be learned in a defined, limited context: "The case defines the boundaries of what you want to talk about and the vocabulary they will have to use."

Although cases can serve as great resources for vocabulary acquisition, they are equally valuable for encouraging practice of communication skills that focus on "language functions" like "defining, explaining, and generalizing" (Ulrich, 2000, 230). Language faculty pointed out that working with cases gives students the chance to hone language proficiency within targeted skill development as they summarize, synthesize, and debate. One professor of a less commonly taught language highlighted the fact that cases help his students work toward narrating in paragraphs and in different time frames, developing advanced-level skills on the ACTFL Oral Proficiency Interview scale. Using less formal terms, language students described their language skills improvement through the use of business cases in terms of "combining elements" of the language, particularly in contrast to how they have worked with the language in other courses:

> With business cases I felt like I was working actively with the language. I was able to not only be able to speak at length about something I wasn't familiar with, but I was able to combine all these basic, different fundamentals of language (grammar, vocabulary, speaking) into one big exercise. That's a lot more practical for me than just sitting down with a lot of drills, finding the right prescribed answer to fill in a blank, or something to that extent. With the cases I was able to master a bunch of different skills.

Another language student described this benefit as having gained "ways of sounding more professional," which went beyond acquisition of professional terms to the learning of strategies like questioning for clarification and circumlocution of unfamiliar vocabulary:

> The advantage of these cases is, we're not just writing sentences or repeating specific constructions. We're trying to very quickly and very effectively express ourselves in a very limited vocabulary and a very limited grammatical structure. It's been described as "You're trying to run on empty. You don't have enough gasoline to do it but you're attempting it anyway."

It is apparent that the active engagement with the language and the creation of original expression in the target language is something students see as a distinguishing feature and an advantage of business case methodology.

Not surprisingly, cross-cultural learning was seen as a major benefit of using business cases. This point is frequently addressed in the literature as a primary advantage to using business cases (Ainsworth, 2005; Federico and Moore 1995; Takami, 2008). This is in line with scholars like Hager ("Intercultural," 2001; "Culture," 2003), who stress the importance of developing students' cultural competence in teaching business languages. That cultural learning through business cases was acknowledged just as readily by the business faculty as by the language faculty is noteworthy. According to one business professor, using cases helps teachers to "highlight the issues that all international businesses invariably face, which is having to do business with, having to negotiate with, having to converse with, having to—just in your everyday work lives—having to coordinate with people who speak other languages, people who are not necessarily as fluent in the languages that you are conversing in." A critical perspective came to light from a business student who had taken languages in the past. To her, the great advantage of learning through cases is that they place students in a cross-cultural context, forcing them to deal with the consequences of the cultural differences, not just be aware of them: "In a lot of my language classes they teach you culture but they really 'teach' it to you, so they tell you 'This is what it's like.' But for these cases, because it's real-life situations, you can actually understand it better." Several students agreed that cases help them develop cross-cultural competence by forcing them to independently execute decisions that hinge on cultural issues. To them, using cases encourages them to learn "by doing" as opposed to merely reading or hearing the information from a source such as a textbook or a lecture.

STRATEGIES

Faculty and students alike emphasized that thorough preparation is a prerequisite for a successful business case class. Several faculty pointed out that the composition of a series of questions is helpful to focus the class discussion and to guide the students along the narrative thread of the case story that they wish to convey to the students. One business faculty member in particular focused on the importance of "sit[ting] down and lay[ing] out a game plan" and creating a "skeleton framework" prior to teaching a case. There is general concurrence among faculty that it is crucial to possess a definite sense of purpose in approaching a case with students in order to allow them to extract the "gems" of knowledge that are often not evident at first glance. Preparation seemed to serve that purpose of guiding students toward certain lessons and realizations with a wise and gentle, yet firm, hand.

The suggestions above hint at an approach of significant rigor and predictability. However, a number of faculty we interviewed warned that it is essential to allow for an element of improvisation when teaching with cases. As one business faculty member put it: "It's very important that you have your line of questions, but you need to be so flexible with your line of questions. You see, the use of a case is much more like jazz than classical music. Because classical music, the score has been written; it's like lecturing, you follow the score. You can probably change your tone, that's like a good pianist of classical music. The problem when you are doing a case is you need to be able to improvise." Yet it is "not pure improvisation." He went on to describe how Churchill, known for his wit and remarkable public-speaking skills, clearly realized the importance of preparing his so-called impromptu remarks. Similarly, a well-executed and productive case discussion, as effortless and unstructured as it may seem on the surface, should be held together by rigid structures and patterns that might not be detectable to the untrained eye, or even to the student participant. Thorough preparation and well-developed contingency plans ensure that the teacher can improvise as the discussion and other in-class activities start forming their own narrative around the case. Such preparation, including the selection of the case itself, allows language faculty to mark clear boundaries in the content that will be covered in a case, thereby limiting vocabulary and structures to those which the faculty member intends students to learn (Valdivieso, 1992).

The students' perspective on preparation was similar to that of the faculty. They expressed the need to prepare themselves for the fluidity and open-endedness of case discussions by forecasting several possible scenarios and

to entertain other possibilities beyond the immediately predictable ones. They also focused on the need to assess their own knowledge of key facts in the case, to identify information gaps, and, last but not least, to attempt to read between the lines: "When preparing to present for a case or even just to discuss the case, the best thing to do is kind of like map everything: What do you know? What information do you still need? What information is kind of implied by certain things?" One piece of advice was to "engage yourself in an inner monologue to help think through the various possibilities, thinking through what you have learned in class, additional information you have researched, etc." Still, being prepared is only half the task, since in the classroom, it is important to be ready to think and respond quickly: "It's very effective in making you be quick on your feet, which, even if you can do [it] in English is not always the case in a foreign language." For those who have taught with business cases, it is evident that no case discussion is identical. Students often reach unexpected levels of creativity and propose solutions not foreseen by the instructor. In this sense, teaching with cases is a learning process for the instructor as well. One business professor insisted that "What is really critical is that you listen very carefully as the class unfolds and mark in your mind where what you expected to happen departs from your actual plan and go back very quickly after teaching that case class and revise your game plan." This insight suggests that teaching with cases requires considerable time and effort, but that experience helps improve an instructor's skills as a case facilitator.

Language faculty new to teaching with cases recognize that they already possess many of the capabilities needed for the effective execution of case discussions. To begin with, cases can easily be set up to integrate many activities common to the language classroom, such as role plays, simulations, and other interactive exercises. Almost all interviewees acknowledged that role plays are a valuable tool in case discussions, since, as one student stated, "it makes it easier to jump outside your body and switch perspectives." Further, business language instructors with expertise in fields such as linguistics, second language acquisition, and literary analysis can rely on familiar approaches from their field while teaching with cases. As one professor aptly explains: "Literature teachers are phenomenologists to begin with, we realize that truth—the idea of the correct answer or 'truth'—is much more complex than oftentimes the engineering school or business school will actually teach their students. So we realize that truth for us is like an onion with many layers to it . . . whether it's in a work of literature in a text or whether it's in a case

study, there are multiple layers of truth, and our students need to have that other way of knowing." This inclination in faculty who are trained in literary analysis to tease out different meanings in texts compels students to entertain qualitatively defined angles to case narratives. The case approach promises an intellectually stimulating classroom discussion as a result of its migration away from the purely quantitative aspects of a case to a more holistic view.

Not only may these unique capabilities in literary interpretation predispose language and literature faculty to master case teaching methodology, these very capabilities likely add considerable value because of the addition of qualitative aspects to the case interpretation. While most business language faculty may focus on language skills development, cases present an opportunity to move beyond language-focused activities to the business content and to the "story" that constitutes a business case. Both students and faculty interviewees saw the value of integrating content and language, getting the most from both. A business faculty member who spoke from her experience as a learner of Arabic advised that "Being able to get the mind engaged in substance and not structure is really a critical pathway to fluency." Her assertion suggests that even with a language considered challenging to native speakers of English, the encouragement to focus on content can propel some students into unexpected proficiency gains.

CONCLUSION: LOOKING AHEAD, LEARNING FROM EACH OTHER

Clearly, the success of using business cases in the foreign language classroom is dependent upon active and generous sharing among colleagues—both within our own field and across disciplines—of ideas, materials, methods, and encouragement. Programs sponsored through Centers for International Business Education and Research provide a forum for productive interaction and support, and as a result "have a major impact on business language and cultural education" (Grosse, 2009, 21). Such support was given for this project, which has led directly to the enthusiasm and additional programming at the CIBER at our home institution, to fill additional gaps in business case resources and training programs for language faculty. In the new grant cycle, GW-CIBER will offer a case-writing workshop to language faculty to generate the initial cases, with extra teaching notes specifically for business language faculty. This effort jumpstarts a business case clearinghouse that will make cases in foreign languages available to all.

As evidenced by this project, an interdisciplinary team of educators and scholars who use case methodology can help facilitate cross-fertilization

between the pure business aspects and the realm of culture and language. This creates a dynamic learning experience for both business and language students, ultimately promoting the development of multifaceted global business leaders.

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