

Adopting Techniques to Engage Students when Teaching with Cases Online

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Abstract. The paper summarizes the contemporary issue of moving case teaching online that accounts of designing student-teacher interaction by means of keeping students engaged with. The consistency of the case method conduction both in-person and online is explored. In that respect, the design of the traditional framework is addressed by focusing on the first two stages of case teaching – the foundation and the flow. The issue of moving the case teaching online boosts the research perspective to the contemporary discussions about creating transformational learning experiences and student engagement.

Keywords. Case teaching, In-person, Online teaching, Student engagement, Transformational learning experiences.

1. Introduction

The purpose of the report is to examine the consistency of the case teaching paradigm comparing the traditional and the transitional environments of conduction – in-person and online. Referring to the traditional composition of case teaching is necessary to delineate those steps that are to become convertible from in-person to online context. The focus of the paper is primarily the design of the preparation (foundation) and the discussion (flow) stages. There the corresponding sub-stages within are to be unzipped and fragmented as case paradigm episodes to be translated in terms of the online teaching layout. Particularly, case method components such as “establishing classroom infrastructure” should be remodeled in an intangible and inseparable mode as to be provided online, and should directly concern the nature of the student engagement issue.

2. Consistency of the Case Teaching In-Person and Online

Bringing the case method online encounters the challenge of scaling under pressure to maintain the highest level of participant-centered learning possible [3]. Examining the traditional case teaching journey is necessary here to identify those components that are to be transformed for the purposes of online teaching. Moreover, blueprinting the case teaching process make it possible to compare the traditional and the synchronous journeys from their practical guidance perspective in terms of understand the way we teach and learn by the case method (Table 1).

Foundations

The Foundation stage in case teaching is a grounding one. Comparing the two modes in teaching – in-person and online – it appears to be consistent, prepared formally in advance. It becomes convertible when the point comes to establish online participation requirements and online “infrastructure” establishment, which is the actual online preparation.

Taking Ownership is a valuable feature of the foundation stage in case teaching. It means the case teacher to make the content and the message of the course clear to him- or herself and others. He has to ensure that he has the authority and self-confidence to take control of the student experience, understanding where his support and opposition will be. Moreover, taking ownership regards setting the students’ expectations about the content and conduct of the course, and their own role in it.

Table 1. Comparison of online and in-person case teaching design, based on the traditional practical guidance and the contemporary online teaching experience [1]

ELEMENT	CASE TEACHING JOURNEY	
	TEACHING IN-PERSON	TEACHING ONLINE
FOUNDATION	<ul style="list-style-type: none"> • Taking ownership (self-confidence) • Making a contract • Developing course content • Motivating students • Helping the students prepare for case discussion • Establishing classroom participation requirements • Establishing infrastructure • Setting length and frequency of class sessions • Wrapping up 	<ul style="list-style-type: none"> • Setting learning objectives • Sets clear tasks • Cold calling to reticent students
FLOW DURING THE CLASSROOM	Preparing yourself <ul style="list-style-type: none"> • Crafting a teaching plan • Demeanor in class Starting to teach <ul style="list-style-type: none"> • The first class • Opening classes • Managing discussion • Beyond discussion Concluding discussion	<ul style="list-style-type: none"> • Facilitate discussion • “Sitting in” as a manager, auditor, client, or consultant. • Interacts: warm calling; questioning, creating polls, videos, presentations, breakout grouping. • Suggests processes to make students productive.
FEEDBACK	Designing Evaluation <ul style="list-style-type: none"> • Designing Assignments – oral and written; individual and group; before, during and after case teaching process. • Designing Exams – selecting cases for exam and writing exam questions; • Designing Term Papers Grading <ul style="list-style-type: none"> • Scaling • Structuring feedback 	Scopes the deliverables to prove meaningfulness and usefulness of the case.

Making a contract acknowledges being explicit about expectations about the course, while describing it in the formal syllabi. The case teacher as a faculty member sends a letter to the students before the course starts explaining the contract (syllabi). It requires that the student devote time in the first class to explain the course structure and how the case discussions are to be conducted. Further, the faculty member *develops the course content*. He lines up the issues to be covered by dividing the course into parts, and structures the syllabus. The teacher selects and assigns the cases, as well as the readings and textbooks.

Having the contract and the course content in store, the case teacher needs to market the course in order to attract students, believing that it will succeed on its own merits. —by word of mouth and course description only. *Motivating* students is important because they should invest scores of hours in a course, and why it is worthwhile. To convince students, the case teacher as a faculty member should *demonstrate enthusiasm* for the material for further *student engagement* with the case method. He or she should focus on the case method relevance, as well. The case teacher is committed to the value of learning for its own sake, but emphasizes that the real-world relevance of case studies and discussions will teach students about the practical implications of what they are learning, is crucial. For those students motivated by the trade aspects of what they are taught, the teacher emphasizes how grounded case discussions are in the reality of practice. Moreover, case discussions help students to build valuable skills presenting students with the opportunity to improve their ability to speak publicly, think on their feet, and improve their problem-solving and pattern-matching skills. Teacher also focuses on keeping teaching environment safe where students can overcome their typical anxiety in case discussions.

Foundations in case teaching are set on *helping the students prepare for case discussion*. The teacher becomes an instructor and reminds students to dedicate enough time, read the case several times, pay attention to exhibits with numbers, answer any preparation questions, ask what the main challenges are for the case protagonist(s) and what he would do about them, formulate an outline for a strategy, and be ready to talk about it in class. Moreover, he states the *classroom participation requirements* as a part of the grade. He makes it clear that he reserves the right to call on any student at any time on any question or course material for which the student has requested preparation. In-person, classroom participation does not just mean that the student is physically in the classroom. The student has to say something to show preparation, and he has to contribute to the discussion by building on other comments from classmates or the teacher, and to work towards understanding problems and generating alternative solutions. While excluding the physical attendance, the same remains valid for the *virtual classroom participation requirement*: good virtual participation means moving the discussion forward; successful virtual participation is achieved when everyone, including the teacher, learns something from the discussion. The dialog with peers to advocate for case solutions should occur regardless of whether it is in-person, or online. The classroom becomes a simulation of the reality, and students should be ready to discuss, submit decisions and analyze them.

Discussion-based teaching needs a supporting infrastructure. Schools dedicated to case teaching have special classrooms designed for discussion and the administrative support necessary for handling the many little details involved in a successful case course. *Establishing virtual infrastructure* then becomes crucial to adapt the teaching process and the virtual classroom to each other. The question is about establishing “seating arrangements” in which the students face each other, but the pattern in the virtual classroom responds to the functionality and reliability of the teaching platform, that should “simulate” a horseshoe or a circular pattern, e.g. breakout rooms. Setting length and frequency of class sessions remains equal to the both in class and online case teaching.

The preparation phase is not just about the structure, content, and context of the course, but also about what comes after it. *Wrapping up* foundations, flow and feedback stages is important to be clarified before the actual process of case teaching in-person or online begins.

Flow

Preparing the course is a scene-setting exercise, expressed in the syllabus. The teacher prepares for each case he is going to teach: to understand the content of the case and how it relates to other topics and cases in the course; to decide on a teaching plan, including a board

plan; and to plan how he/she is going to run the discussion. Preparing as an instructor should result in a *crafted teaching plan* for the case. The plan is more like a framework giving some milestones the instructor wants to reach rather than a detailed script.

Usually the plan contains: 1) the main points the students have to take away from the class; 2) links to other cases and topics in the course. 2) the topics to be discussed, in proper order and in terms timeframe; 3) the *opening question*, who should probably answer it; 4) a rough board plan of the structure to be written on the board(s) during the classes or sessions. 5) frameworks, models, theories, presentations, videos, and other supporting material included in the course and in case teaching. Preparing for the class, the case teacher understands that his role as an instructor is based on his own style and *demeanor* in class. During the *first class* students learn the mechanics of discussions. Including rules or guidelines in the written syllabus, the case teacher plans a separate session with the students, in class or in online session, before the course starts. A *case discussion* should be cumulative: each comment should build on the preceding one. In order to do that, students listen to each comment by putting their hands up when they want to say something. It serves to underscore the mechanics of the discussion and the role the students have in giving and receiving, learning to and from each other [5].

Further, the instructor spends some time and asks the participants what their *concerns and expectations* are. An effective technique is to go around the room (in teaching live) and in both environments – to write down their answers on the whiteboard, and then revisit the list to check that the student addresses at least most of the expectations. This is to make it clear that the learning outcome of a seminar or a session is a joint responsibility of the audience and the discussion leader.

The classic way to start a case is to have a student *open the case discussion*. The instructor has three main ways of doing this: a “cold call,” a “warm call,” and an “open call.” A *cold call* occurs when an instructor starts by asking a student directly. A *warm call* is when the case teacher starts by naming the student who will open the discussion, but give the person some time to collect his or her thoughts. He can also notify students when and how he plans to call on them further in advance, by email [5]. An *open call* is when the teacher simply asks for a volunteer to start the discussion. A great way to start the class is to *have a vote* on some question or *poll* the students on some numerical point, finding the thinking behind the analysis.

The core of case teaching lies in *managing discussion*. The instructor decides who gets to speak, when, and for how long; uses boards to keep track of the discussion; asks questions that drive the discussion forward; and is conscious of his own movement and position in the classroom or of his presence during the online sessions. The most important content of case teaching are the student contributions—their suggestions, comments, and questions.

Using the board is a privilege of case teaching. The board is its vital tool; as the students come up with various points about the case, the teacher writes them down (using key notes, drawings, tables, or whatever methods he or she can think of to do it fast). Taking notes in public serves a number of purposes. First, it provides a shared overview of what students have been discussing. A second purpose is to guide the discussion. The instructor can also use the board to introduce frameworks and models into the discussion. The purpose of using boards and developing board plans on it is to drive the discussion.

In classroom using the *body language, silence, and movement* is much of the art of discussion management. The instructor can direct a discussion well by using body language, not being very explicit. A powerful tool not to be underestimated is silence in both in classroom, and in online sessions. If the presenters pose a question to the audience and when nobody answers, it is preferable not to start rephrasing the question or answering it himself. Instead, he or she needs to wait and keep quiet, until somebody blurts out something.

In most schools, classrooms are designed to be faculty-centric and support lecture pedagogy. During the case discussion the case teacher tries to open up the space and physically signal that he will be *sharing the space* with the group. In online case discussions “sharing the space” amounts to managing cold and warm callings, or *asking questions*. Choosing questions for a case discussion is similar to designing an interview guide for a field research project. Questions serve many purposes. The instructor uses them to start discussions, to guide the discussions deeper or higher, to follow up on student contributions, and to make transitions between students and topics.

Case teaching is about much more than the core method of a single teacher guiding individuals in a discussion of a case in a plenary setting. It is about *using theory* and other non-case material, but not reciting theories and frameworks. It is about the ability to examine a real-world situation (represented by a case), apply a theoretical perspective to it, and draw conclusions from this about how to proceed. Despite using theories in case discussion, a technique that creates an immersive environment, bringing the case and related analysis to life and fostering empathy for the players involved in the case, is *role-playing*. It can build insight and increase commitment to the case. Moreover, the case teacher can break off the plenary discussion and have the students discuss the topic between themselves or in breakout rooms online [5, 6]. He may also want to generate detailed ad hoc group discussion among the students on some smaller points.

The flow of case discussion is to be concluded at determined point. The goal of the conclusion of a case class is not only to summarize and focus on the key learnings, but also to finish as to have the students continue the discussion among themselves after class and to provide a transition to the next class.

3. Designing Case Teaching Online by means of Transformational Learning Experience

Creating a Transformational Learning Experience

One of the main goals when teaching online is making classes as interactive as possible “to keep students from tuning out“. Finding pedagogically meaningful ways to engage them is essential to online learning. This means to make a synchronous class, which is more discussion-based avoiding *just-speaking* mode and using the available technology. In the flow stage of managing the discussion, case teaching online adopts particular techniques of student-teacher interaction by means of the transformational learning experience (Fig. 1).

Basic interaction with students could be provided through *audio* and *video content* shared on the screen. *Screen sharing* becomes a must so that the whole class can view presentation materials. *Hand writing* or drawing on the screen could be practiced by Whiteboard tools or substituted by a tablet. *Chat windows* are to keep track of, but they are a powerful tool to allow students who aren’t speaking to bring up ideas or follow up on previous points. The best way for the teacher to keep the students engaged online is to look at the camera and *to sell* the course for the students to become convinced that it is valuable. The teacher needs to present involvement by conveying the sense of the commitment within the course. Using *warm calls* by letting students know ahead of time that the teacher has planned to call on them; or *cold-calling* by emailing students ahead of time about the topic to be discussed. The teacher has either to interject discussions to reengage students, or to make the discussion a central part of the lecture especially when he applies the case method or the peer-to-peer learning. Creating *polls* ahead of time to use during class or writing them on the spot if something interesting comes up during the discussion is also an engaging technique. Moreover, when online students’ attention fades, teachers could *summarize* what have been discussed.

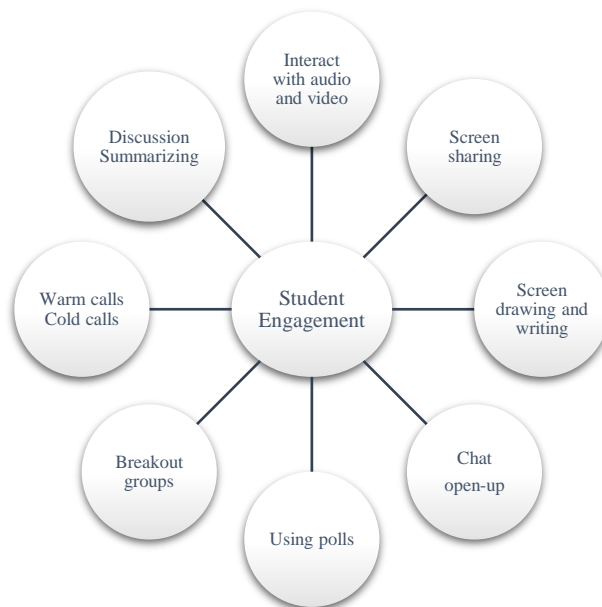


Fig. 1. Student engagement techniques supporting teaching with cases online

Most online teaching platforms integrate *breakout rooms* to get students into virtual groups. An effective tactic to get students more actively involved in case discussions is to use a breakout session, where students can talk to one another in a group of 4 to 7 students. The case teacher pops in on each group to check on progress and to ask if they have questions, “sitting in” as group manager, auditor, client, or consultant. He sets a clear task; suggests processes that might make students more productive; scopes the deliverable so that it would be meaningful and useful [6].

In an interactive lecture the teacher sets a clear learning goal for the day, shares expectations around how that goal will be achieved, and provides questions for groups to answer. Students then work to discuss an idea, reflect, and try to draw closure. The teacher requests that the students learn or students engage the teacher with what they have already learned. Learning interactions are rarely concentrated between the students directly. Rather, informal cooperative moments are generated in classrooms. Hence, in online teaching educators carefully dedicate a larger proportion of course time to formalize those “informal moments” into cooperative learning structures. Those structures would keep students “united toward a common goal” [4]. To ensure a more cooperative learning experience educators employ practices, which promote coordination, interdependence, and accountability. These practices can work well in synchronous online teaching settings, in-person, or in a blended format (Table 2).

With any given version of in-person teaching educators may be tempted to rely on naturally occurring group dynamics and generate enough informal cooperation to hold more instructor-focused courses again, as the case teaching is. But teaching “as usual”, even in a hybrid world that involves small groups with physically distanced seating, is no longer enough. Reciprocally, students will have undoubtedly higher demands for the quality of the face-to-face time. [4]

Table 2. Formal practices to ensure cooperative learning experience [4]

8 Formal Cooperative Practices in Teaching Online	Poll-group-repoll
	Value lane
	Students Teams-Achievement Devisions
	Learning Roles
	Role Play
	Expertise-Specialization Project
	Peer Grading
	Group Prcessing

Designing a student-teacher interaction in online case-teaching journey

Moving the case teaching online is about maintaining the benefits from teaching with cases in the traditional classroom. Usually, academic case studies have three or four decision points that students have to discuss, by using the knowledge they have, and then exercising judgment. Students coming to class prepared to having read the case debate, discuss. Moreover, they listen to alternative points of views, shape and deepen their thinking based on the arguments made. The case teacher plays the role of trying to make sure that the learning is deepened by questions that students are asking. He intervenes to drive the case to a rich discussion of the issues that helps peers hone their judgment and they're learning skills. Case teaching online is being designed as an interactive medium and a participant centered *modus operandi* (Table 3). Transforming the learning experience of the case method online, more or less, it is about retaining all of the in-person experiences rather than change the case method approach [2, 3].

Table 3. Designing a student-teacher interaction in online case-teaching journey

ELEMENT	TASK		PRINCIPLES
	STUDENT'S ROLE	FACULTY MEMBER'S ROLE	
PREPARATION	<ul style="list-style-type: none"> • Need to become aware of the text of the case 	<ul style="list-style-type: none"> • Setting learning objectives • Cold calling to reticent students • Sets clear tasks 	Consider a business context or a situation
DISCUSSION	<ul style="list-style-type: none"> • Exercise decision points of the case. • Use the knowledge gained. • Exercise judgment. 	<ul style="list-style-type: none"> • Facilitate discussion • "Sitting in" as a manager, auditor, client, or consultant. • Interacts: warm calling; questioning, creating polls, videos, presentations, breakout grouping. • Suggests processes to make students productive. 	<i>Students</i> debate decision points. <i>Faculty member</i> ensures the learning is deepened by students' questions
			<i>Students</i> listen to alternative points of views <i>Faculty member</i> makes interventions to drive the case to a rich discussion of the issues that helps students hone their judgments.
JUDGEMENT	Write down an argumentation on a decision made upon the situation	Scopes the deliverables to prove meaningfulness and usefulness of the case.	<i>Students</i> shape and deepen thinking based on the arguments made <i>Faculty member</i> perform a mentorship

There are guiding principles that help the faculty member support variable courses. In the beginning, the educator considers that he/she is going to cover 75% of that material, as a minimum, because of the technology gaps that are to come. Also, the teacher has to get as much data about what students think they are coming into class with, based on their pre-class preparation, doing polls inside or outside the e-platform. In this manner, the educator already knows what students think and consider, so that he can draw out much more quickly than what he might ordinarily need to do in the physical classroom.

Using *breakout room* for the case discussions help teacher to establish “circular seating arrangements” for student engagement. It is a feature of video and audio conferencing platforms as Zoom, open source web conferencing as BigBlueButtonBN within Moodle, or Skype, used in online teaching, or distance education. The case teacher breaks the class in small groups of 4-6 students online either randomly or in a preselected fashion. He announces before the class the issues that are to be discussed or the technique that is to be studied and approaches the generated virtual teams.

After completing the task, the class is called back, the small groups are reassembled and students share than what they did in smaller groups. In breakout room the case teacher cannot see everyone at the same time, but he pops in on each group to check the progress and to enrich the discussion that leads the group to the demanded judgements. The key is to constantly keep the students engaged to cooperate around a common goal.

4. Conclusion

Despite the differences between in-person and online case discussions, there are important similarities between them. These are still case discussions [5] that are to be prepared, managed and closed. Pattern recognition and development of solutions in cooperation with others remains continuous in both. Students keep learning it by “distilling key problems from fuzzy data, formulating solutions, and advocating for them in dialogue with peers” [1]. Most cases focus on decisions, and it’s possible in an online environment to put even more of the work on students to decide what to do. If students feel like they are accountable, they are likely to be more invested. In keeping students engaged, the case teacher uses the need for interactivity and format changes [7] to his/her advantage in keeping them engaged. The virtual classroom then becomes a simulation space where the case teaching expounds on the experiential learning paradigm.

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