



NATIONAL DEFENSE
UNIVERSITY

Case Study Methodology

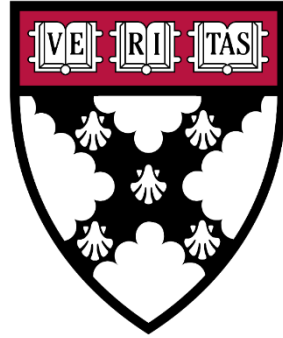
Best Practices (& Potential Pitfalls)

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Eisenhower School for National Security & Resource Strategy

National Defense University

My Own Case Method Academic Journey



- Economics MS & PhD
- Game theory: Science of strategic thinking
- Pure lecture & theory with zero case method
- Management strategy
- 100% case method MBA & Exec Ed teaching
- Significant case study research & writing
- Strategy & economics
- Business, policy, & national security
- Case method for military & government
- National Security & Resource Strategy
- Industrial Analysis
- Blend of case method & lecture instruction

Game Theory → Management Strategy → National Security

Case Study Methodology

Agenda

- What is **Case Method**?
- **Why** Case Method?
- What Makes an Effective **Case Study**?
- **Why Not** Case Method?
- What are **Common Pitfalls** to Avoid?

What is Case Method?

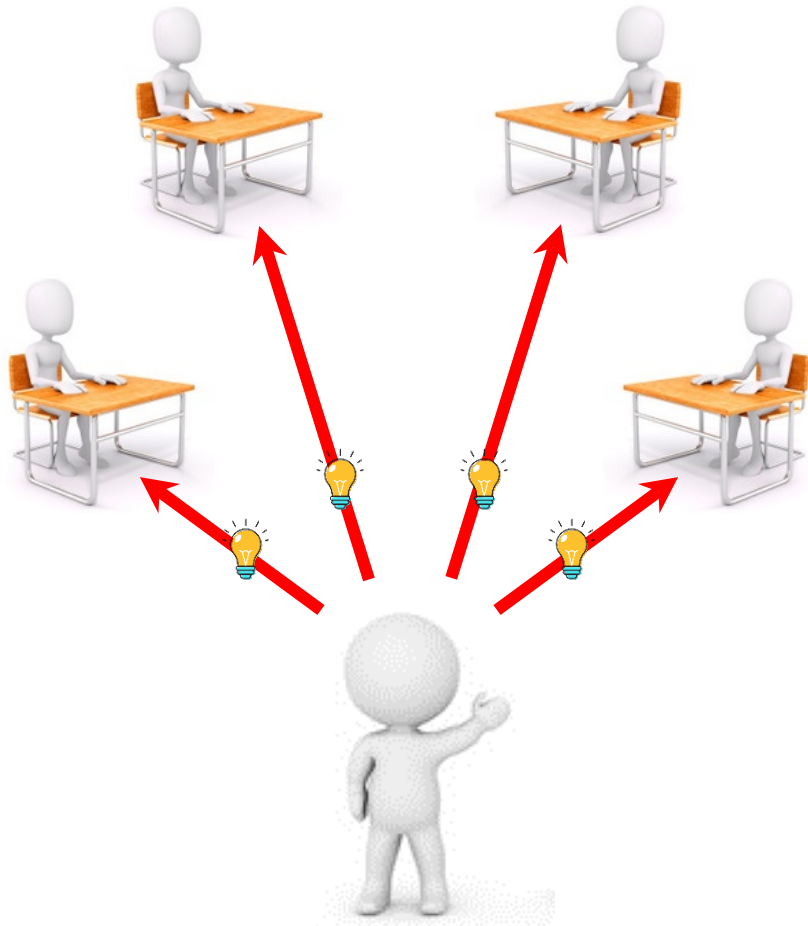


<https://www.youtube.com/watch?v=Zp70pCiqcwk>

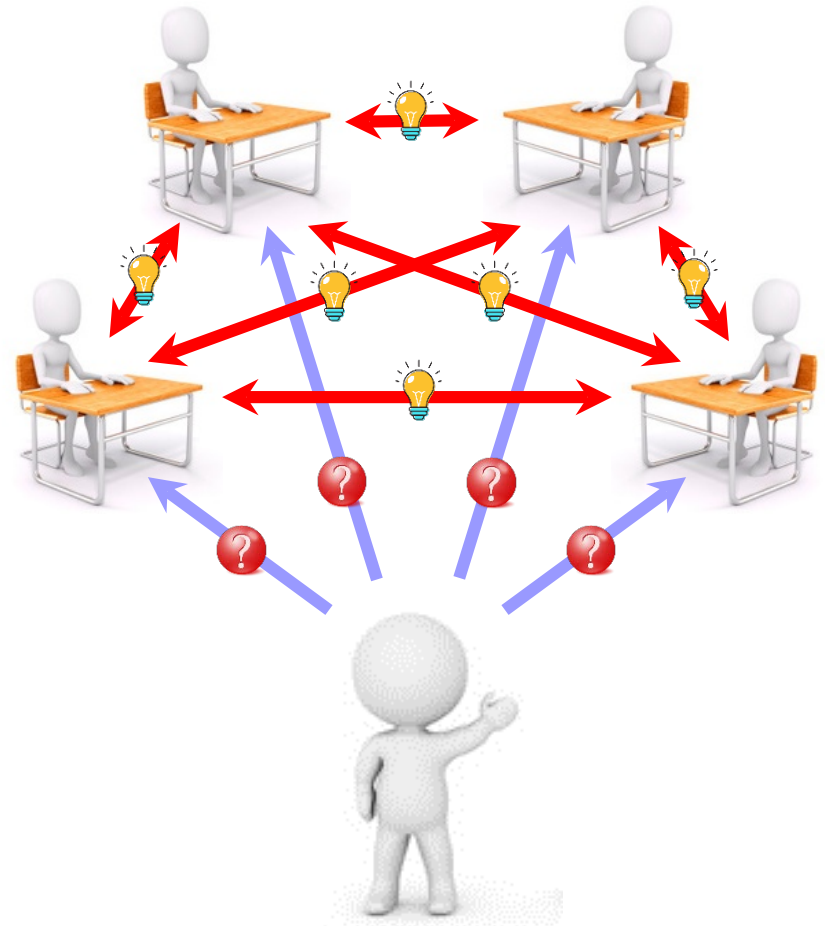
What is Case Method?

Lecture Approach

Case Method Approach



“Sage on the Stage”

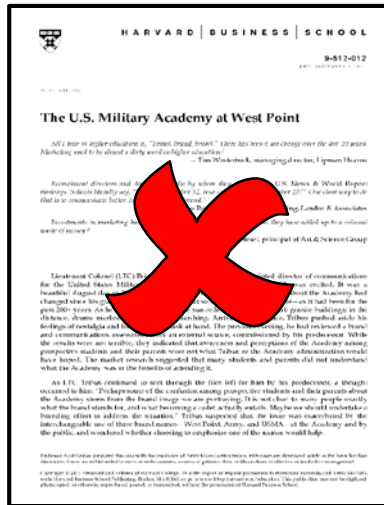


“Socrates”

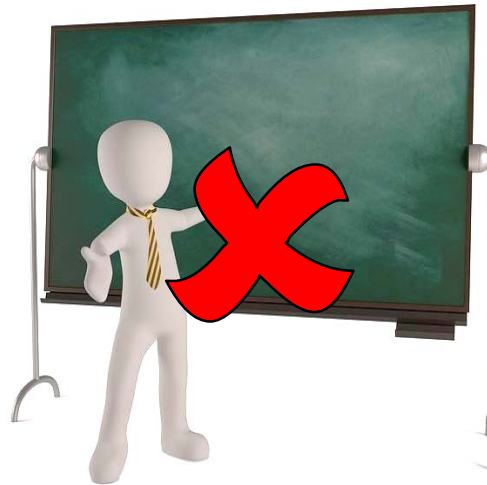
What is Case Method?

Analysis & Conclusions from Students Only

Where is the locus of thinking & analysis?



Case Material



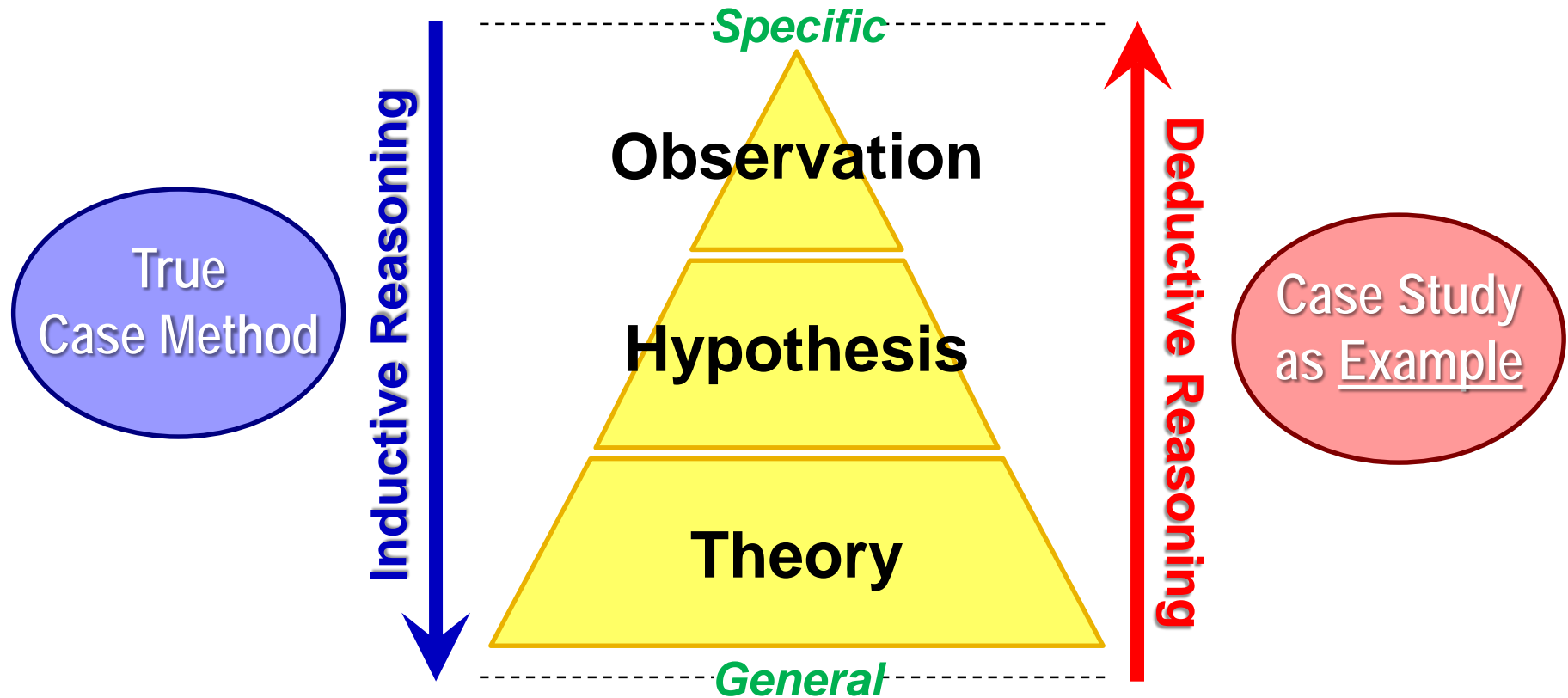
Instructor



Student

What is Case Method?

Case Study Method for Teaching Theory



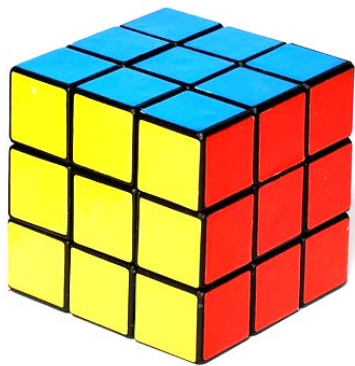
- Case method assures the **practical relevance** of theory
- If a theory can't be taught via case method, maybe it should **not be taught at all** in professional education!

What is Case Method?

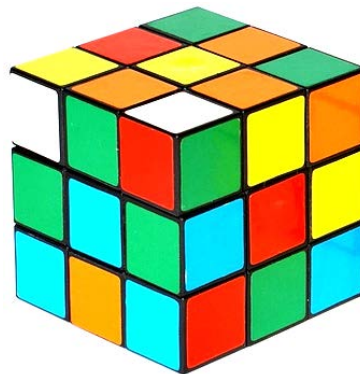
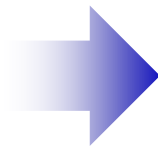
Case Study Method for Teaching Theory

Case study method ...

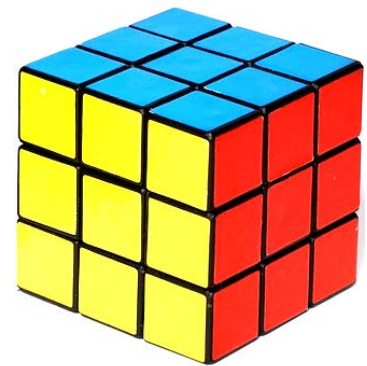
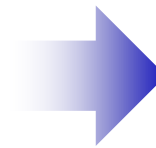
- Does not replace, but **complements**, teaching of theory
- Can be a **more effective way** of teaching theory
- Takes a simple theoretical idea, makes it frustratingly **complex**, and then makes it **simple** again



Simply Theory



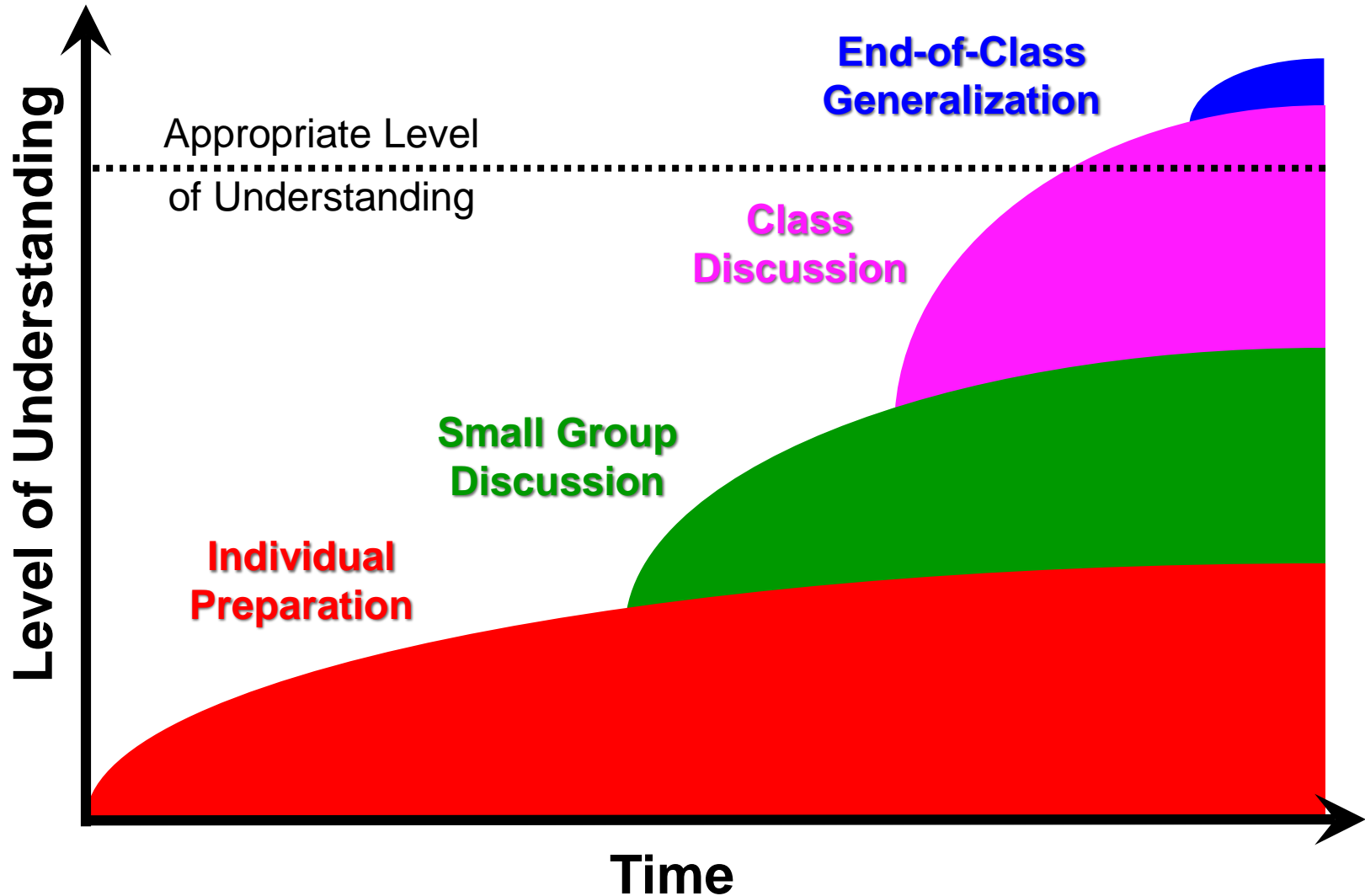
Complex Reality



Simple Theory

What is Case Method?

Collaborative Creation of Knowledge



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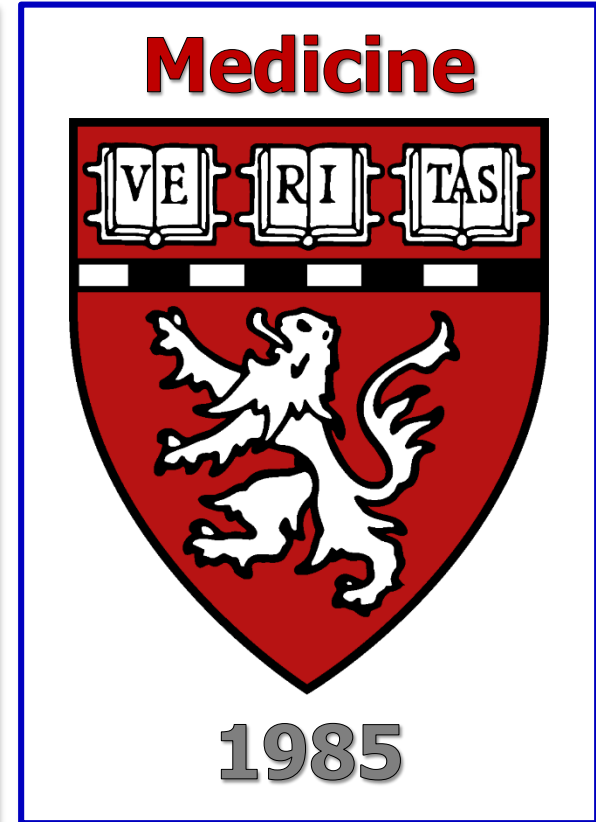
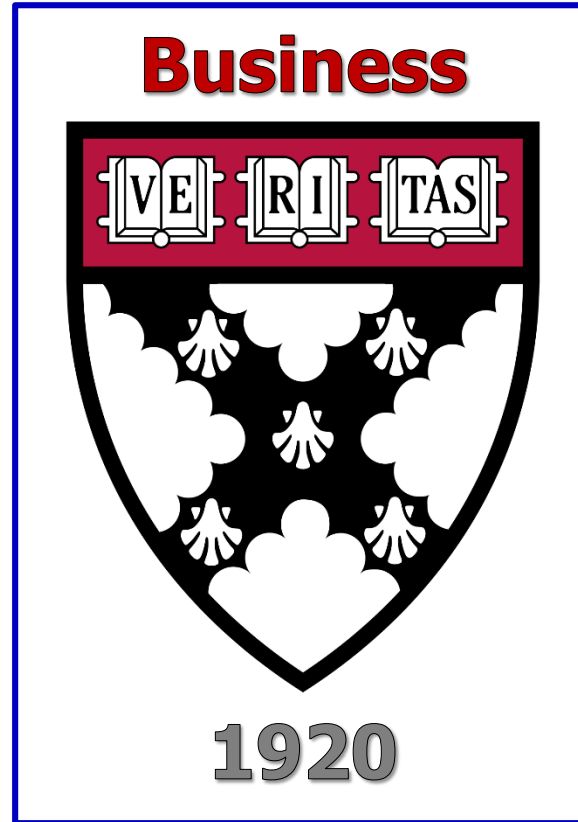
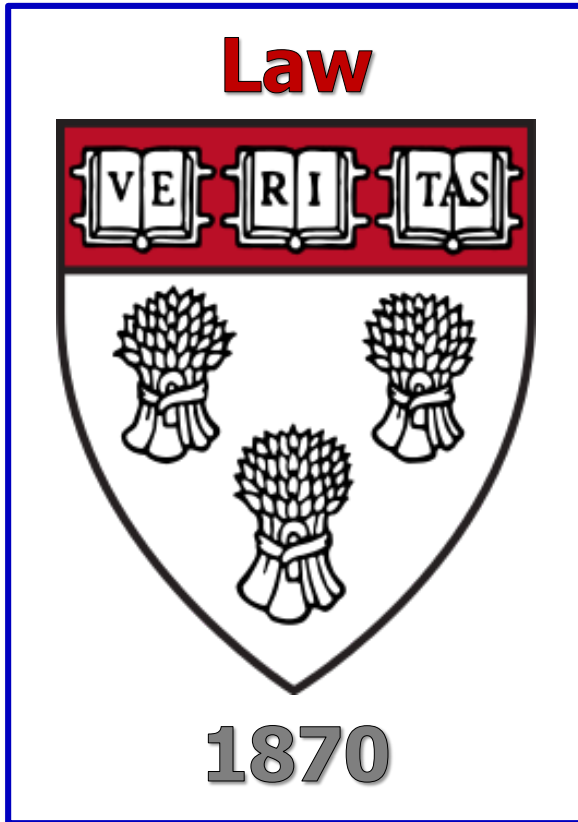
Why Case Method?

The Learning Pyramid



Why Case Method?

History of Success in Professional Education



*Professional Education → Knowledge AND Skill
→ Practice → Experience → Wisdom*

Why Case Method?

Art & Science of Military Leadership



- **Leadership**
- **Strategic Thinking**
- **Decision-Making**

Science

- Underlying **principles**
- Can be **taught** via lecture

Art

- Must **practice** to master
- Requires **experience** – including **mistakes!**

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What Makes an Effective Case Study?

Case Study Sources:

- Numerous business & policy schools
- Best sources provide teaching notes
- Internal development for custom content

HARVARD BUSINESS SCHOOL

9-812-012

1-800-495-6330

The U.S. Military Academy at West Point

All I hear in higher education is, "Don't brand, brand." There isn't a marketing used to be almost a dirty word in higher education.

— Tim Winters, L.

Recent graduates and donors like to see by where they attend. Students identify with "We are at West Point, now we get to that is to communicate better, to have a story—a brand."

— Hayes Roth, VP worldwide

Recent grads in marketing have paid off the many colleges, but for a while of money?

— Richard A. Hess

Strategic Planning on a Military Calm Skies or Turbulence Up

To provide his people a more high-quality product, and more in a through a whole world, properly equipped, and highly motivated workforce.

— Cannon Military A

Commander Jim Nagere was the father of the United States in Northeast Asia. As a member of an executive committee, Nagere had played a leading part over the last five years that at the decision phase—reaching a balanced view that—both in terms of equipment and communications equipment from an external source, some of the results were not terrible. They indicated that awareness and perspective students and their parents were what that that of it have hoped. The market research suggested that many students what the Academy was on the benefits of attending it.

As LTC Tribus continued to sort through the files left for him occurred to him: "Perhaps some of the confusion among prospective Academy stems from the brand image we are portraying. It's what the brand stands for, and what we're trying to do is to be a brand that is interchangeable one of three brand names—West Point Army, and the public and wondered whether choosing to emphasize one of it

MCAS Cannon Military Department

The Cannon Military Department (MCAS) is located in the north of the United States. It is a member of an executive committee, Nagere had played a leading part over the last five years that at the decision phase—reaching a balanced view that—both in terms of equipment and communications equipment from an external source, some of the results were not terrible. They indicated that awareness and perspective students and their parents were what that that of it have hoped. The market research suggested that many students what the Academy was on the benefits of attending it.

HARVARD KENNEDY SCHOOL

9-812-012

1-800-495-6330

Case Number 2065-0

"Reinventing" the Command: General Janet Wolfenbarger's Values-Based Leadership Drives Change at the United States Air Force

Due to increasing long-term costs in the United States Department of Defense, expanded Wolfenbarger. Even so, Wolfenbarger anticipated opportunities for the Air Force to keep it ready for war, assembled a small team to examine the

Lieutenant General Janet Wolfenbarger, Vice Commander of AFMC, led a team of organizing the command to align with the efficiency standards that the Department, expanded Wolfenbarger. Even so, Wolfenbarger anticipated opportunities for the Air Force to keep it ready for war, assembled a small team to examine the

A Career in the Military

The Air Force Academy is a military college for officer candidates for the Air Force. It was an Air Force officer, so I lived my childhood as an Air Force officer, said Wolfenbarger, when her father told her that Congress had

STANFORD BUSINESS

9-812-012

1-800-495-6330

Case: HR-4 Date: 10/14

NAVY SEALs: SELECTING AND TRAINING FIGHTING FORCE

The special operations unit of the U.S. Navy, the SEALs (for "Sea, Air, Land") are the most elite fighting forces. SEALs are called on for sensitive assignments throughout the U.S. military.

Selection for this unit was a grueling process. It began with a 200-mile march (BUDS) class. Typically, just 20 percent of the SEALs class were able to complete it. Those who were not were eliminated from the class. Qualification Training (QT) was the next step. SEALs who were not selected for the SEALs class were not allowed to re-apply.

NAVAL POSTGRADUATE SCHOOL

GRADUATE SCHOOL OF BUSINESS AND PUBLIC POLICY

Case Study - MAR 2011 2016

The Defense Advanced Research Projects Agency (DARPA)

Dr. Anita Bhattacharya was the 20th director of the Defense Advanced Research Projects Agency (DARPA) in July 2012. DARPA had been the driving force behind many revolutionary technologies and had delivered an incredible "bang for the buck" over the years.

Despite a scientific budget of \$3 billion a year—a small fraction of the \$88 billion "DOD" budget of the DoD—DARPA had been the driving force behind many revolutionary technologies and had delivered an incredible "bang for the buck" over the years.

DARPA had been the driving force behind many revolutionary technologies and had delivered an incredible "bang for the buck" over the years.

Case Study Content:

- Many PME relevant contexts or themes
- Facts & quotes, but not analysis or conclusions
- Written like mystery novel, not after-action report

What Makes an Effective Case Study?

What may not be a good (teaching) case study?

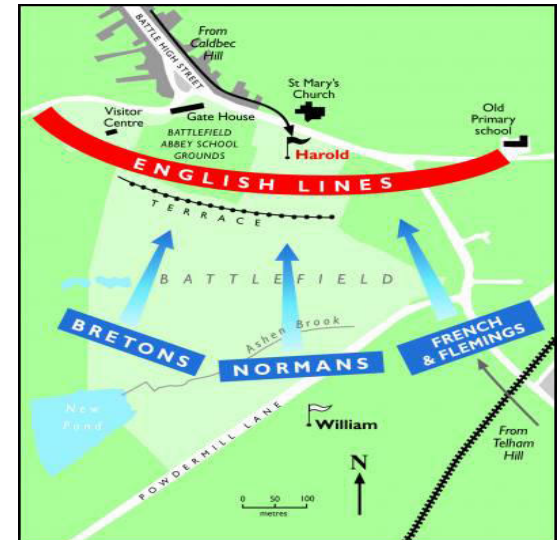
Selected Books or Chapters



Collections of Articles



Guided Battle Terrain Tours



Potentially useful as case study material, but these often ...

- Provide analysis & conclusions – so **not** a “mystery”
- Not explicitly designed for **teaching** or to foster **debate**

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Why Not Case Method?

Valid Concerns from Various Perspectives



Students

- “Case method learning requires **more work** than just reading & listening to lectures”
- “I’m uncomfortable making & defending on-the-spot **decisions with limited information**”



Faculty

- “Case method teaching requires **more work** than just preparing & delivering lectures”
- “I’m unfamiliar & uncomfortable with Socratic method of **case discussion leadership**”



Institution

- “Knowledge retention may be higher, but we **can’t deliver as much content** with cases”
- “Commitment to case method requires major changes in faculty **recruiting & development**”

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What are Common Pitfalls to Avoid?



1. Not **preparing students** for the expectations of case learning
2. Insufficiently developing, supporting, or **motivating faculty**
3. Using cases as a rare rather than **common pedagogical** approach
4. Not committing to potentially **develop your own** case studies
5. Seeking only to learn from history rather than to **learn in history**

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Questions?

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