

The Case Method in Marketing Education: A Two-Team Approach

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This article reports the successful use of a two-team case approach to teaching marketing problem-solving in a graduate marketing management course. For each case discussion, one team assumes the role of a marketing consultant, a second team plays the role of company management, and the remaining class members serve as company owners. Benefits to the students taught by this approach include increased experience in marketing application, reinforcement of marketing theory, and additional communication and interpersonal relations experience. The technique is presented in a ready-to-implement form for use by marketing educators.

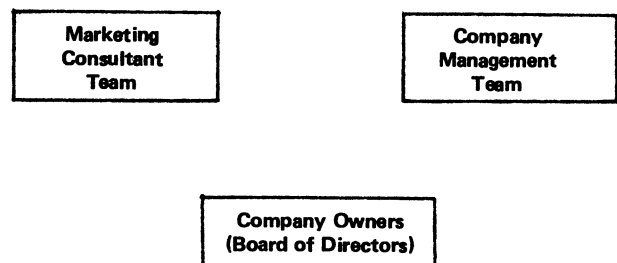
Marketing educators are always searching for new ways to make teaching and learning more effective. The best teaching methods are practical, provide students with the opportunity to learn by doing, and efficiently use both students' and the instructor's time.

The method described in this article, I believe, meets the above criteria. First, it is relatively easy to use this teaching technique. Once explained, the technique is easily implemented in the classroom and students quickly take the initiative in running the case for the day. Second, it supplements the lecture method of teaching marketing theory by allowing students to use that theory in a realistic situation. Thus students learn marketing by doing marketing. Increased involvement with the subject matter may increase students' knowledge of and interest in marketing and satisfaction with the course. Furthermore, this teaching method uses the students' and instructor's time efficiently. Once this method is set up and operating, it

gathers a momentum of its own and almost runs itself. Students know what they are to do, and when; only limited instructor intervention is required.

The two-team approach to the case method in marketing education allows students to work together in teams to apply marketing concepts, principles, and methods to solve a marketing case problem (see Figure 1). As with the traditional method of teaching cases, students must recognize the case problem and develop a solution to the problem posed by the case. But unlike the traditional case method of teaching, the two student teams are responsible for conducting the analysis of the case and for covering the important issues of the case. In addition, one team is responsible for successfully marketing its case solution.

FIGURE 1
COMPONENTS OF THE TWO-TEAM CASE APPROACH TO MARKETING EDUCATION



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For each case covered during the semester, one team assumes the role of a marketing consultant while a second team plays the role of company (i.e., client) management. The remaining class members serve as company owners (or members of the board of directors).

The marketing consultant team analyzes the case for the day and prepares a group solution to the case. This team then develops a consultant report and presents the report to the company management team. The primary responsibility of the consultant team is to get its recommendation accepted by the company management team.

The company management team listens to the consultants' presentation, asks questions of the consultants, evaluates the consultants' analysis and recommendation, and decides whether to accept the consultants' recommendation. The primary responsibility of this team is to make sure that all relevant case issues are brought out and discussed.

The remaining class members, in their role as company owners or members of the board of directors, listen critically to both teams and analyze the performance of each team. After the company management team makes its decision to accept or reject the consultants' recommendation, the remaining class members may ask questions of each team prior to making their individual evaluations of each team. Thus all students are directly involved, while the instructor observes the learning process and makes evaluations. (The student evaluations provide an input into the instructor's evaluation of the performance of the two teams for the day.)

Purpose

The main purpose of the assignment is to encourage students to apply marketing concepts and tools in the process of recognizing and resolving a marketing problem. Secondary purposes are to provide students with exposure to a variety of viewpoints as they work within a group to develop their team solution to the problem and with the opportunity to formally present their team report, discuss its contents, and market their recommendations to an informed and discerning audience.

Benefits to Students

The first benefit of this approach is that it reinforces the marketing theory discussed in class. By actually applying the theory to a problem, each student on the marketing consultant team becomes more familiar with marketing theory and how it may be used. Since the consultant team is evaluated in part on whether its recommendation is accepted by the company management team, there is a built-in incentive for using the material correctly. Moreover, since the goal of the two-team approach is a group solution to a marketing problem, students must analyze and discuss the specific case and the marketing knowledge appropriate to it. This discussion by students in groups also reinforces the subject material. Students also become familiar with problem-solving methodology and gain experience in its use.

Another benefit of this approach is that by being a member of a consultant team and a company management team, each student simulates being a marketing decision-maker. Thus, each student assumes direct responsibility for a marketing decision.

Group interaction in preparing a team solution should also result in additional interpersonal relations experience by team members. Communication skills, which are important to marketing practitioners, may also be enhanced by this approach. Student teams are required to make an oral presentation and prepare a written report. Practice in formal communications is beneficial to students later in their careers.

For the class members who are watching the two teams in action, there are many benefits. First, they may compare their individual case solution to the marketing consultants' solution and monitor the subsequent discussion between the consultant and client teams. Thus they may judge how well they have analyzed the case. Second, by watching many different team presentations (both consultant and client teams), they may formulate their own guidelines for effectively presenting and marketing a case solution. The guidelines they formulate may be useful later in their own casework or on the job when the need arises.

Setting

This approach was used in teaching marketing problem solving in a graduate marketing

management course. Most students in the course had a technical undergraduate background (e.g., engineering) and a number of years of technical work experience, but little or no prior marketing education or experience.

Marketing theory was taught using the traditional lecture method and marketing cases were interspersed with the lecture material throughout the course. After marketing principles were presented and discussed in the lecture, a relevant case was scheduled for discussion. An entire class period (90 minutes) was devoted to each case. Most of the cases focused on a particular aspect of marketing such as market research or pricing, although the cases used near the end of the course were more comprehensive in nature. Cases involved consumer, industrial, and international marketing, and concerned manufacturers primarily (only one case involved a retailer).

The students did a very good job of implementing this approach and their verbal feedback indicated that the approach was a good learning experience.

DESCRIPTION OF THE THREE ROLES

The interaction of students, taking turns in the three roles, makes up this approach to teaching marketing problem solving by the case method. Bringing together students in each of these three roles during the day's discussion of a given marketing case may increase the quality and quantity of learning about marketing. *All* the students are involved in *every* case studied.

Marketing Consultants' Role

The marketing consultant team acts as an advisor to an organization which has one or more marketing problems as described in the case. The team prepares an analysis of the case and develops a team solution. The team is encouraged to make use of the appropriate marketing theory during the case analysis and problem-solving steps. Then, the team prepares a case report, presents the case, and markets its recommended solution to the company management team. The team also defends its analysis and recommendations under the questioning of the company management team and the company owners.

Company Management Role

The company management team represents the management of the company in the case. The company management must become familiar with the case material, the marketing problems, and the role of the consultant team in resolving the marketing problem.

This team listens to and evaluates the marketing consultant team's report. The company management team questions the consultant team on its report and recommended solution and then decides to accept, accept with modification, or reject the consultants' report and recommendations. In turn, the company management team is subject to questioning by the company owners concerning its performance.

Company Owners' Role

The remaining class members individually analyze the case prior to discussion of the case in class. During the case discussion, they listen to the consultant team's presentation and its discussion with the management team. After the management team makes its decision on the acceptability of the consultant's report, they may ask questions of either team. Finally, each of the remaining class members individually evaluates the performance of the consultant team and the company management team.

SEQUENCE OF EVENTS

After the instructor has developed a course syllabus and selected an appropriate marketing case for each unit of study, the cases are scheduled around the lecture material to reinforce it. Students know in advance when they will participate in each of the cases and in which roles. This clearcut scheduling allows students to plan their work with a maximum of certainty.

Establishing and Scheduling Teams

Early in the semester, the class is divided into teams of not more than four members each and each team is assigned a team number. These team numbers are then easily added to the course syllabus to show when each team will play each role (i.e., marketing consultant and company management) and for which cases. Any team members whose team numbers are

not assigned on a certain date are considered to be company owners (evaluators) for that day's discussion.

Conducting a Case

The following steps are used during each session in which a case is being conducted:

1. The consultants' report is collected. A copy is given to the company management team. The company management team report is collected at the same time.

2. The consultant and the company management teams are given five minutes to organize themselves. Other class members (company owners) may review the case individually prior to the start of the presentation.

3. The consultant team presents its report (including the recommended solution and the plan of implementation) to the company management team.

4. A brief break may be taken for the company management team to evaluate the consultants' report and to generate questions for the consultant team. Other class members (company owners) may also generate questions for either team to be posed later.

5. Questions are directed to the marketing consultant team by the company management team. Discussion follows. If necessary, a brief break is taken to allow the management team to consider the consultant team's solution.

6. Then, the company management team decides to accept or reject the consultants' report and recommendations. If the proposed solution is not completely acceptable as presented, the company management team agrees on any changes which it prefers to make. A spokesperson is chosen to represent the company management team and report its decision.

7. The company management's decision is presented to the consultant team by management's spokesperson. A brief discussion follows to settle any remaining differences between the two teams' positions.

8. Company owners (remaining class members) may question either team on the case analysis, recommendations, and/or the solution adopted.

9. Company owners evaluate the performance of each team by filling out and turning in an evaluation form provided by the instructor.

10. The instructor completes the case discussion by identifying any issues which have not been brought out.

DELIVERABLES

Each role has associated with it certain deliverables (or requirements). These requirements are designed to ensure comprehensive coverage of each case.

Marketing Consultant Team

Each consultant team provides the following items:

1. An Executive Summary Report. The executive summary report contains the standard case analysis components (i.e., situation analysis, problems, causes, alternatives, evaluation criteria, evaluation of alternatives, recommendation and justification, and implementation plan). Guidelines for its preparation include a length limit of four typewritten pages. Students are encouraged to be concise and to use the outline format.

2. An Oral Presentation. As already mentioned, an analysis of the case and recommendations for solving the marketing problem are presented orally to the company management team and to the company owners. The presentation is limited to 30 minutes in order to allow for adequate discussion. Students are encouraged to use visual aids and handouts as appropriate and to do the presentation in a professional manner.

3. Potential Examination Questions. The final requirement of the consultant team is a list of five excellent multiple-choice questions (including answers) which could be answered by a class member who had listened to the consultants' report. Some of these questions may show up on a later examination. Thus, all students are encouraged to prepare for and actively participate in each case.

Company Management Team

Each company management team provides the following items:

1. A Company Management Report. The company management report includes the nature of the organization's marketing problem, role of the consultant in the resolution of the

problem, and ten questions management anticipates asking of the consultant team, based on the case information. The report should not exceed two typewritten pages and should be concise, and preferably in outline form.

2. Participation in the Case Discussion. The team will participate in the evaluation of the consultant team's presentation and report by questioning the consultant team and by deciding whether to accept, accept with modification, or reject the consultants' report. Regardless of management's position, it must present a justification for its decision.

Both Teams

Each member of each team submits (in confidence) an evaluation of how much each of the other members of his or her team contributed to the team's overall effort (or performance). Because this evaluation is used in assigning a grade to each member, it is designed to encourage the full participation of each team member in the team effort.

Company Owners

Each class member who is not a member of either the consultant or the company management team submits an evaluation of the performance of each of the participating teams. These evaluations are an input into the instructor's grading of the two participating teams. In addition, each should prepare an analysis of the case on an individual basis.

TEAM EVALUATION CRITERIA

This section of the article reports the criteria used to evaluate the performance of the marketing consultant and the company management teams.

Marketing Consultant Team

The grade for the marketing team is based on the team's presentation and executive summary report. The consultant team is evaluated on such factors as:

Presentation

1. evidence of adequate preparation
2. organization of the presentation

3. enthusiasm and power of the presentation
4. effective use of visual aids
5. ability to get ideas across
6. quality and quantity of supporting evidence and justification for recommendations
7. overall analytical ability
8. professionalism
9. quality of answers to company management's and company owners' questions
10. success in marketing the recommendations to the company management team (was the recommended solution accepted?)

Executive Summary Report

1. analysis of the environment of the case and statement of assumptions
2. identification (and prioritizing) of problem(s) and cause(s)
3. extent to which proposals and recommendations are practical, realistic, and detailed
4. quality and quantity of analysis of proposals and justification for recommended solution
5. detailed implementation plan
6. complete use of the case analysis methodology

Company Management Team

The grade for the company management team is based on its participation in the analysis of the marketing consultants' report and on its management report. The company management team is evaluated on such factors as:

Participation in Case Analysis

1. evidence of adequate preparation
2. use of role playing
3. enthusiasm, appearance, and professionalism
4. quality of questioning of the consultant team
5. evaluation of the consultant team's report and recommendations
6. thorough coverage of the major issues of the case
7. justification for adoption or rejection of the consultant's report and recommended solution

Management Report

1. identification/specification of the marketing problem
2. role of the marketing consultant in problem resolution
3. ten questions to ask of the consultant team, based on the case information

In arriving at a final grade for each team, the instructor evaluates the performance of each team on the factors indicated above for the respective roles. The final grade for each team also reflects the instructor's consideration of the performance evaluations submitted by each of the class members (company owners). Each team member receives the same team grade (except where the other team members have indicated some individual adjustment might be in order owing to the individual's degree of contribution to the team effort).

RESULTS OF USING THE TWO-TEAM APPROACH

Experience with this practical approach to marketing education indicates that students do achieve a good understanding of marketing. While students are immersed in a marketing situation which requires them to successfully analyze a case and sell a marketing solution,

they have the opportunity to apply marketing theory and to simulate its actual use. Furthermore, they are practicing their interpersonal and communication skills. Finally, by practicing marketing, marketing realism and dynamics are brought into the classroom. Student performance on examinations and comments after the end of the course indicate that, although the approach requires more than the usual amount of preparation on the students' part, they gain a good understanding of marketing theory and its use, and they enjoy working together to solve a marketing problem and to sell a marketing solution (i.e., accomplish their team's goals).

AFTERWORD

The approach presented here is a proven way to improve marketing instruction and learning both qualitatively and quantitatively. To the extent that students increase their understanding of marketing, both theoretically and practically, to that extent they will be more competent, interested, and satisfied students. Insofar as marketing educators implement teaching methods which help students reach these goals, a more accomplished and satisfied group of marketing educators should emerge, ones who have developed future marketing practitioners capable of providing accomplishments for their organizations and benefits for their customers.