

The Narrative Case Study Meets Hypertext: Case Studies in the Digital Age

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Abstract

While English departments address the modern student as “wreader,” hypertext learning reaches beyond the humanities. Extending work done in composition studies, business programs are focusing on digital learning strategies. The case study has been a standard learning tool for business students since Harvard introduced case studies in the 1920s. The Yale School of Management is now pioneering the digital (or “raw”) case method through its MBA program to present case study information in hyperlinked, nonlinear, multimedia formats.

This paper analyzes the current move in business school pedagogy from the traditional case study method to digital cases. It discusses the impacts of digital case studies and the differences between moving traditional “cooked” cases online versus providing truly “raw” case data that is open-ended and allows for multiple solutions. As seen in examples from the Yale School of Management’s publicly available digital cases, digital case pedagogy allows business programs to adopt methods privileged in composition: de-centering the professor, encouraging participation, and equalizing difference by privileging associational thinking. More than just a useful tool to engage millennial students, the digital case, in its privileging of multiple narratives and linked information, acts as a catalyst for new ways of approaching business.

Keywords: case study, business, e-learning, multi-literacies, gender, raw case, digital pedagogy

Introduction

Case studies have characterized business school pedagogy since Harvard University professors introduced the multi-page narrative in the 1920s. Typically formatted as ten to fifteen pages of text followed by a series of questions, case studies prompt discussion in business school classrooms and simulate real-world decision making. Recently, however, the traditional narrative case study has entered the digital age by way of Yale University’s School of Management, where new “raw” cases capitalize on the specificities of modern technologies, impacting the way students read, synthesize, and analyze data, ultimately changing the way students “read” their business environments and make decisions.

The study of business and commerce has encountered many radical changes since the case study method was introduced in the early twentieth century. The rapid spread of democracy and capitalism, advances in communication and production technologies, and globalization changed the way businesses operate in every sector of local and global economies. That the case study method maintained its relevance during such significant shifts is a testament to the case study’s ability to transverse market specificities and guide students through decision-making processes regardless of external conditions. The case study method now faces a significant shift from the traditional, narrative, 1920s “cooked” case to the multi-narrative, digital, “raw” case of the twenty-first century. Hypertext does more than bring traditional print online, with differences “so various, at once so minute and so vast, as to make hypertext a new medium for thought and expression” (Slatin, 2008, p. 165). Instructors must ask, then, how the hypertext medium mediates learning in the business case study. Despite the fact that the case study will remain an important teaching tool for business students, the impact of the shift to the new digital case format and the effects it will have on student learning must be acknowledged.

In any format, case studies perform an important function in business school curriculum as “they convey wisdom gleaned from successes and failures and compensate for students’ lack of real-world experience and knowledge” (Kenney, 2001, p. 347). Traditional textbook-style learning may introduce business students to the histories and reasons for specific business principles, but only the case study can

simulate the ways students will engage those principles in the context of the workplace. In traditional encounters with case studies students are presented with a narrative, typically in handout format, where roughly 15 pages of text are followed by scenarios and discussion questions. The case will include seemingly incoherent information which must be synthesized in order to reach a decision. Students usually work on cases in small groups, typically outside of class, and then reconvene in large groups to discuss findings and argue positions. Cases “challenge students to take sides, play roles, identify stakeholders, or demand that a restricted menu of options be expanded” (Kenney, 2001, p. 347). In this way, cases “encourage active participation and engagement” as students “think out loud and learn” in either face-to-face or online learning environments (Kenney, 2001, p. 347).

Narrative Style in “Raw” and “Cooked” Cases

The traditional case relies on narrative conventions that “circumscribe and structure how cases tell stories” (Kenney, 2001, p. 347). In these cases, a linear narrative progresses by way of a protagonist and his or her inevitable point of view and a story line that presents a set of facts (Elias, 2008a). Students typically read through the case narrative and then begin working through the information once they reach the questions presented at the end of the data set. Jaan Elias, Director of Case Study Research at Yale University, has noted that, “Traditional cases (what we have come to refer to as ‘cooked’ cases) inevitably simplify a management situation because a narrative requires an understandable beginning, middle, and end” (2008b). Because cases “present dilemmas, cases lead students to identify with the protagonist and to grapple with the problem” (Kenney, 2001, p. 347). In the “cooked” case, then, perspective is limited to that of one singular voice and students encounter data only through that voice, which functions to suppress certain other perspectives and to “contain unacknowledged positions” (Kenney, 2001, p. 348).

When the traditional case study moves to the digital or online format, however, the limitations of the linear case meet with the possibilities and complexities of the hypertext environment. In the same way that electronic literature allows for reading experiences that the print genre precludes, digital case studies allow for readings vastly different from those in the traditional case. As the leader of the digital (or “raw”) case movement, Yale University has made public two of its digital cases. In the Spectrum Auction case, for example, point of view and the construct of a protagonist are replaced by the multiplicity and variant readings characteristic of hypertext literature.

The Spectrum Auction case deals with the United States government’s auction of digital spectrum as television companies prepare for all-digital broadcasts beginning in 2009. The online case data provides regulatory information, data on each of the U.S. and international market competitors, a series of news stories related to the auction, information on the industry, an explanation of the actual auction outcome, and four preparation questions. In this sense, the digital case is not unlike a traditional case in terms of topics covered or questions asked. But when accounting for the sheer volume of data covered in each type of case, the differences in reading traditional versus hypertext cases become clear.

In a traditional case, an explanation of the U.S. market broadcast competitors would likely be presented within the space of a few pages and would contain statements placing value judgments and assigning rank to each competitor. The nature of information presented by a singular narrator is that data is presented as fact when, in reality, it could be open to interpretation. In the Spectrum Auction case, rather than presenting data cohesively, students navigate through hypertext links to each competitor’s stockholder relations site and collect financial data on each company individually. The case site functions as “a more flexible format, allowing a number of points of view or story lines to be considered simultaneously” (Elias, 2008b). In keeping with the hyperdocument’s ability to “contain material from different media such as text, graphics, video, and sound,” the U.S. market data section of the Spectrum Auction case includes information on six different U.S. companies spread across 23 links, leading to each company’s investor relations site, then linking further to information including podcasts, press releases, and financial statements (Slatin, 2008, p. 169). The process for students of gathering this “raw” data creates a different reading experience, where students no longer read passively through the entire case and *then* begin synthesizing data prompted by questions. Students now work through data as they navigate the case sites, asking “what should I look at next?” as the entire case becomes a simulated sort of inbox exercise where students must isolate what is relevant and prioritize information (Elias, 2008a).

Data Volume in Hypertext Cases

Navigating through cases this way leads to a massive increase in the amount of data students can work through during a given case. Traditionally, cases “have to be short for students to ‘inhabit’ them quickly” (Kenney, 2001, p. 349). In his article “Classroom Techniques in Teaching the Case Method,” Ram

Charan notes that “student seem to prefer short cases regarding recent situations” (1976, p. 117). Joel Podolny, Dean of the Yale School of Management, said in a talk on the raw case format:

Student response was a revelation, they really loved it, they loved looking at the raw stuff. Here they had been complaining about 15 page cases, and we dumped 1,000 pages on them, if you go through all of the material, and suddenly they were all fine because they could click from two-page article to two-page article, they looked at videos, they looked at maps and did other things. So rather than saying you must read this 15-page document, they had a website they could click through and for some reason they seemed to like this better. It's more organic, it's more in keeping with what students today do. They use the web more frequently than we used any kind of reference material when I was going to school. (2008).

In the Spectrum Auction case, what would have been synthesized and boiled down into 15 pages or less was spread over more than 94 primary links (many more if the links were followed beyond one click) and greater than 800 pages of raw text. Digital cases often include multimedia elements such as YouTube videos of interviews and advertisements, stationary advertisements, and information graphics such as charts, graphs, and other schema that visually communicate information in ways that cannot be measured in page numbers. In their Texas electrical utility (TXU) case, for example, Yale case authors provide information in the form of informal conversational video clips followed by on-screen text (Rosenthal et. al., 2008a). That students prefer dealing with this measure of information speaks to students' preference for reading in the digital format.

The process of gathering information using the digital case method leads to different ways of thinking for students. Hypertext is “primarily associative rather than syllogistic... the hyperdocument ‘grows’ by a process of accretion, whereas the conventional document tends to have been winnowed out of a larger mass of material” (Slatin, 2008, p. 171). Under this associative construct, hypertext becomes “an inclusive medium” wherein “no individual point of view need be excluded” (Slatin, 2008, p. 171). Rather than simplifying problems in the bottom-line business tradition, students are able to toy with the humanities-oriented approach of complicating issues, reading for multiple perspectives, and privileging ambiguity. While business students will be in a position to act decisively, practicing this type of critical thinking may lead to more conscientious, worldly business leaders who are better-skilled at recognizing the relationships between and among data sets.

Associational Thinking and Collaboration in Digital Cases

That digital cases studies, by virtue of their hypertextual nature, lead to associational thinking raises important considerations for business school students in terms of gender preferences. Business schools continue to attract a largely male student body, but the digital case study helps to mediate imbalance by providing a method of learning more appropriate for women's preferred styles of learning. In composition classrooms, researchers have shown that “men are solitary and competitive learners, whereas women learn better through collaboration” (Gerrard, 2008, p. 195). Instructions for the Yale Spectrum Auction case highlight the collaborative requirements of digital case study work:

There is a great deal of material in this case. In order to keep each student's assignment to a manageable level, I suggest you specialize within your study group. For example, one person could study the auction rules and FCC regulations; another could learn about the technologies and costs of each incumbent and the new spectrum; a third could compile information on the business strategies, market shares, and financial positions of potential and actual bidders; a fourth could learn about the European and Japanese markets as well as next generation technologies and regulations arriving in those regions (parallels/lessons for the US?). (Rosenthal et. al., 2008b)

The team-orientation of the case study may therefore tend toward women's preferences for collaborative work, as “hypertext provides a social space in which processes of collaboration can be reexamined” (Selber, 2004, p. 87). The associational thinking tied to hypertext reading in digital cases also relates to research that shows “female students prefer to explore connections among disparate bits of information, whereas men are more likely to appreciate the efficient acquisition of facts” (Gerrard, 2008, p. 195). Perhaps most importantly, modern student preferences for the digital case can “test the claim that men tend toward linear, and women toward associational thinking” (Gerrard, 2008, p. 195). While the effects of digital cases on gender in the classroom can be hypothesized, further research is needed to determine what, if any, relationship exists between gender and the raw/digital case method.

The digital case study, in addition to providing “a nonlinear and nonhierarchical way of accessing information,” is especially important as business schools recognize that graduates must be digitally literate to be competitive in evolving economies and workplace (Gerrard, 2008, p. 195). Stuart Selber, in his work on developing multiliteracies through intentional curricular practices, succinctly explains the importance of business students’ functional literacy:

...constructing workable functional literacy is crucial for several reasons. First, in order to achieve educational goals in academic settings, students must be able to control technological resources... Second, ...students...must be able to understand the ways in which writing and communication activities are organized in an online environment. Third, in order to compete for rewarding work in a digital age, students must be able to demonstrate technological proficiency... Fourth, in order to enact change, students must have access to the language of the powerful, including the discourse of technology. (2004, p. 35)

The digital case is important not just because it is a preferred medium for today’s students, nor because it is an efficient way to store and retrieve case study material, but because the language of hypertext and the use of digital media have become essential competencies in today’s business environment. The digital case allows users to introduce and take advantage of the very technologies that businesses are using to gain competitive advantage. Business school graduates need not double as computer programmers, but alum ought to be able to effectively navigate and manipulate technology as business schools “prepare students to be authors of twenty-first century texts” (Selber, 2004, p. 139). Business students will not only use hypertext in compiling information, but will likely use it also for presenting information and sharing data with others. Reading and writing in hypertext is not simply a matter of converting traditional reading on-screen, but “a rhetoric of hypertext... must take the computer actively into account as a medium for composition and thought... one has to deal with data structures, with the construction of knowledge... within and to the hard- and software of the computer as well as the construction of knowledge by and for humans” (Slatin, 2008, p. 165). Thus, learning to navigate and to author hypertext requires mastery of both computer functions and the rhetorical constructs of communicating using digital media.

The Future of the Digital Case Study

It is clear that the digital case study method presents exciting possibilities for business school pedagogy and certainly changes the way students access, synthesize, and utilize information. But before rounding out the praises of the digital case method, however, limitations must also be acknowledged. Digital or raw cases are still in their infancy, having been created only within the last four years by researchers at the Yale School of Management. Undoubtedly, digital cases will continue to coevolve with the technologies they rely upon and will continue to change with the needs of students entering business programs as progressively technologically-entrenched digital natives. Unlike the traditional print medium that defines narrative case studies, “hypertext and hypermedia depend upon an emergent technology which is still immature and still subject to radical transformation” (Slatin, 2008, p. 168). As the digital case study advances, business professors and professionals ought to experiment further with the possibilities provided by modern technologies, allowing for greater openness and capitalization of the digital medium.

Despite the innate openness of hypertext systems, the digital case study remains a simulation exercise, one which does not accurately approximate the openness of the internet as users experience it. First, the digital case study under Yale’s model is presented as a singular website with outside links. There are obvious reasons why a digital case requires a common starting point in a case website, but digital cases are viewed as superior to the traditional ‘cooked’ case since, “When you’re out in the world, no one is going to give you an HBS [Harvard Business School] case study” (Leonhardt, 2007). But in the same way that students will not receive a neat, 15-page pre-packaged case document, neither will they have access to a singular website that catalogues, categorizes, and annotates a series of links to relevant information. The digital case method works on the assumption that students have the technical literacy to gather this data on their own and that the case site is simply a convenient starting point. As a simulation exercise for real-world decision making, the digital case study fails to account for students’ processes of gathering and accumulating information. While researchers may “anticipate the day when computers will completely take over the task of information retrieval and management,” students do not yet have this luxury and must be practiced at collecting useful data in addition to analyzing and synthesizing provided data (Selber, 2004, p. 63).

Secondly, the Yale raw case method is explicit in confining a case to the data provided as part of the digital case site. For example, instructions for Yale’s second public raw case read:

Note: Information that came to light after the negotiations that TPG and KKR had with EDF, including the results of their discussions, should NOT inform your work. Your analysis, presentations, and conclusions should be based ONLY on material from this website.... (Rosenthal et. al., 2008b)

There are valid reasons why case discussions might require a cutoff date, such as setting a perimeter for class discussions or providing a common ground for highly televised or widely reported cases. But these instructions are at odds with the very nature of hypertext systems, where “the hyperdocument is not a closed system like a book; it is rather an open and dynamic system” (Slatin, 2008, p. 172). By imposing limits on available data unlike the open internet, these instructions function much like a staple in the upper-left corner of the traditional narrative case study. While it’s true that “each hypertext system has to develop its own conventions,” that metaphorical staple represents the closed system of the cooked narrative case that has carried over into the so-called raw cases of the digital age (Slatin, 2008, p. 176). A truly raw case, however, would balance the necessities of the case study (such as shared data among classmates) with the realities of business students’ material conditions in making decisions in the workplace which involve an open, endless internet where instructions to “stop reading here” never exist.

As case studies undergo many of the changes similar to that of print and electronic literature, it follows that business school pedagogy may also be influenced by that of the humanities approach. English classrooms, for example, have long favored de-centered instruction where learning is viewed as a process shared by both professor and student. The traditional case studies have long required professors themselves to “go beyond knowing the case well” since “further information about a company can be found in its annual reports and in publications” (Charan, 1976, p. 117-18). Normally, a professor would master a case with thorough knowledge of all possible angles, and might prepare by “projecting possible responses” from students (Charan, 1976, p. 118). Joel Podolny summarizes what happens when professors can no longer predict student responses, saying, “For professors teaching in a raw format, there could be a great amount of revelation from the students and professors have to admit that, ‘Oh, I haven’t looked at that’” (2008). In the same way that “metaphors in discussions of hypertext equate reading with the navigation or traversal of large, open (and usually poor-charted) spaces,” classrooms can become uncharted and unpredictable spaces when the narrative structure of a single point of view is removed (Slatin, 2008, p. 170). Professors, accustomed to gathering outside data themselves but restricting students to case packets, become co-learners in the open digital case model.

Moving case studies to digital formats certainly comes with challenges. It is still unknown the extent to which this shift from print to hypertext reading will ultimately shape business reasoning and decision-making. What is certain, however, is that “students who are critically literate can work against the grain of conventional preoccupations and narratives, implicating design cultures, use contexts, institutional forces, and popular representations within the shape and direction of computer-based artifacts and activities” (Selber, 2004, p. 95). Thus, business students studying digital cases are uniquely poised to impact the market and society by virtue of their specific knowledge-making abilities that grow out of associational thinking and hypertext’s privileging of polyvocal narratives. Historically, researchers have hypothesized that “distributed hypermedia environments... can be antithetical to the logic of bureaucracies” (Selber, 2004, p. 93). Whether digital case studies will lead to agile, responsive organizations that react quickly to market forces and opportunities will be determined by the work of today’s business students learning in the electronic environment.

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