MINI CASE CHALLENGE: AN ANALYTICAL EXERCISE INTO REAL – LIFE BUSINESS CASES

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MINI CASE[2]

Abstract. The mini case challenge is an analytical exercise into real – life business cases that can be used to stimulate the critical thinking skills of students especially when faced with a specified time period (which is usually one class session). The mini case presented focuses on the business process management and reengineering of the internal systems development process of a financing company.

Keywords: case study, critical thinking, analytical exercise, experiential learning, business process management, business process reengineering

I. INTRODUCTION

Case based teaching's strengths have been identified as enhanced learner interest and engagement and improved retention, problem solving and critical thinking skills (McLellan, 2004). This approach provides an active learning environment where students apply different skills - problem solving, decision making, collaboration, analysis, criticism, judgment making, and opinion sharing while looking at real – life problem situations. McLellan (2004) defined an ideal case as *"an open-ended story that calls for complex, subtle information from multiple points of view"*. Youngblood and Beitz (2001) confirm that active learning strategies such as case studies are able to enhance critical thinking by triggering cognitive processes such as judgment and reasoning.

Holtham et al (2006) described their innovation class experiences of team deployment in different activities which "*support the idea of widening the palette of types of groupwork used in management education, as well as the need for this to be addressed by faculty teams and individual academics.*" Prince and Felder (2006) identified one important principle highlighting an advantage of groupwork: *"Instruction should involve students working together in small groups. This attribute—which is considered desirable in all forms of constructivism and essential in social constructivism—supports the use of collaborative and cooperative learning."*

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[2] This mini case was developed in collaboration with Rachelle Annemarie Acevedo, a recent graduate of BS Business Administration and Accountancy student at the University of the Philippines (2015). The case is not designed to illustrate effective or ineffective handling of managerial situations. Certain names have been disguised.

The mini case challenge activity was conceptualized after exposure to TV reality competition shows like Top Chef (with its Quickfire Challenges), MasterChef (its Mystery Box Challenges) and The Fashion Show (its Mini Challenges). These challenges tested the contestants' different skills sets within a specified time period, usually around 50 – 80 % shorter than the time period in the usual elimination challenge.

The objective of this activity is, within a short period of time, to test students with a business case they need to analyze, critique and make recommendations to address the issue/s presented. Lamancusa et al. (2008) observed that *"Industry is one of the primary customers of the university. Those customers are constantly challenging academia to make curricula more relevant to professional practice."* As many companies nowadays streamline their recruitment process to identify people with very good critical thinking skills they would be willing to hire, this activity is a good way to simulate the environment where students put themselves in the shoes of either company employees facing a particular problem situation or consultants the company hired to deal with such situation. Lundeberg *et al.* (1999) supports this with the observation that the use of cases cultivated students' ability to identify relevant issues concerning different organizations while Levin (1997) noted that students analyzing cases enhanced their critical thinking and problem-solving skills. Also, Prince and Felder (2006) recognized that *"Cases are effectively used when learning objectives include decision-making in complex authentic situations."* The activity allows this critical thinking and problem – solving ability to be applied in more on the spot situations.

II. METHODOLOGY

The usual time period allotted is one class session and usually done in groups. The most common option the professor can use for groupings is to let students choose their groups. One advantage of this option is students being in a group with people they are comfortable with and work better with. The opposite of the first option is to randomly choose who belongs in each group. One usual challenge here is group interaction dynamics because students may be working with each other for the first time. However, it also gives students opportunities to rise to the challenge if they are up to it. Other options that can be used are variations of the aforementioned.

This mini case challenge methodology evolved from the Star Legacy module, a learning cycle developed at the Vanderbilt University Learning Technology Center (http://iris.peabody.vanderbilt.edu/hpl/hpl_07_trans_bransford.html) with the following major steps:

1. Challenge: Students are given a challenge in the form of a problem scenario, case, project, etc.
2. Initial Thoughts: Students formulate initial thoughts and ideas based on their initial take on the challenge.
3. Perspectives and Resources: Students look at different perspectives and resources related to the challenge (e.g., internet resources, etc.)
4. Assessment: Students make use of activities like discussions to determine what they know and how it can be applied in the challenge.

5. Wrap Up: The professor presents model solutions or answers to the challenge or the students make a presentation to show what they have learned from the challenge.

The professor gives the case at the start of the period. Students are then instructed to immediately commence reading the case and move into the group discussion of the case. They can use resources available to them (e.g., internet resources, books/ journals in the library, etc.) They have the whole class period to submit a two page write-up containing the group's case analysis and critique and their recommendations.

Each group is also asked to prepare a ten minute presentation in anticipation of the discussion of the case during the next class session. Similar to the mini challenges in the TV reality competition shows, the mini case challenge does have a winner or winners. The class is informed about this ahead of the next class session. The following criteria is used to evaluate write-ups: 1) Depth of Analysis, which includes aspects like problem identification, b) alternative courses of action – identification and evaluation and c) recommendations – development and feasibility, and 2) Organization and Clarity, which includes idea presentation, organization and flow.

Group/s with the highest score will make their presentation/s during the next class session as a take off to the subsequent case discussion led by the professor where questions and clarifications from him/her and students can be raised and answered.

III. VALUE PROPOSITION FOR THE TEACHER AND STUDENT

This learning exercise will allow students to enhance their critical thinking and writing skills (written communication) and presentation skills and their ability to both ask and answer questions logically and clearly (oral communication).

One major conclusion arrived at by Kunselman and Johnson (2004) was "integrating case studies will provide well-rounded critical thinkers, which in turn, will result in students becoming better informed" (p. 92). Also, Billings and Halstead (2005) highlighted the crucial role a teacher plays in providing a learning environment that would empower them to develop critical thinking skills. Popil (2011) also pointed out that "teaching the same topics in a lecture format can become redundant and lose its freshness. Developing case studies and discussing them with students brings freshness, innovation, and food for thought to the table." Through this interaction, both the teacher and the student are given the opportunity to learn from one another which positively impacts on the overall learning experience. This contributes to the value proposition in using this teaching method for both the teacher and the student.

Given that students want to become more actively involved in the learning process inside the classroom, teachers are challenged to use a wide array of methods to produce a proactive learning environment where information is gained and skills are enhanced. To emphasize this point, Kunselman and Johnson (2004) stressed that active learning methods such as the case study method equip students with a

variety of important skills; more specifically, "active learning helps students develop problem solving, critical-reasoning, and analytical skills, all of which are valuable tools that prepare students to make better decision and become better students and, ultimately, better employees" (p. 92). In a similar vein, Chang, Lee, and Ng (1999) recognized suitability of the case method to develop strategic analysis/strategic thinking, communication and interpersonal skills. In the same study, students shared that the exposure they have to different case studies focusing on a variety of aspects and the challenge of producing concrete, feasible and appropriate recommendations enabled them to develop important skills such as critical thinking and analysis, teamwork, and even good report writing. Jakka and Mantha (2012) identified that "the most crucial element of management education is developing the student's ability to critically evaluate information and 'think'." They also emphasized that "the student must acquire skills that enable him to form a view of the future (call it an element of foresight) and then be able to act upon it to profit from the coming opportunity."

Value is thus created because using such methods will train students to analyze more concrete and real life – situations more critically and effectively so they can link theory to practice better. This is what companies are actually looking for in their potential hires - an ability to apply what they have learned in school in analyzing actual scenarios, which focus on problem situations or opportunities, and develop concrete and feasible recommendations. This is the rationale behind different companies creating case study analysis based student competitions such as the HSBC Asia Pacific Business Case Competition organized by the Asia Case Research Centre (ACRC) for undergraduate students (www.acrc.hku.hk), which is on its eighth year, and the Maybank Go Ahead Challenge (GOAC)(www.goaheadchallenge.com), an international case competition participated in by penultimate or final year university students and fresh graduates with less than two years work experience from around fourteen countries, which is on its fourth year.

Maier-Lytle et al. (2010) underscored a number of potential benefits of such case competitions beyond using the case study in a classroom setting. They identified the following benefits: 1) students are exposed to specialized knowledge which may not be present in some degree program curriculums, 2) students are given opportunities to improve both their oral and written communication skills in light of the diversity of the student competition participants, 3) students are able to further develop 'soft skills' (e.g., confidence, motivation, responsibility, and teamwork) that they started developing in a less pressure - filled classroom environment, and 4) students are able to hone a competitive edge that can prepare them for the "real world" and the ups and downs that would characterize the company or business. The nature of the competition structure, which necessitates a large amount of work to be accomplished within a short period of time, lends an excellent opportunity for students to encounter an in-depth and wide-ranging learning experience.

So whether in a classroom or case competition setting, there is proof that applied experiential learning and interaction is an advantage that the case method leverages on (Ellet, 2007; Malouf, 1993; Mauffette-Leenders et al., 2005). It is through this applied experiential learning that students are able to develop the skills they need

to face real-world issues and situations when they step out into the world of the working person or entrepreneur.

Burke et al (2013) maintain that, in this dynamic world that this new millennium is offering, "it is imperative that educational institutions equip graduates with the knowledge and skills that are increasingly needed and valued by business and industry" and to use pedagogical tools such as the case study effectively and efficiently, that prove to be beneficial for both students and employers.

IV. MINI CASE

Business was booming for a medium-sized financing company in the Philippines which has been in the lending business for seven years. Their President, Marc Carandang, felt they needed to innovate further to accommodate their growing number of customers. Even past customers were reapplying for loans due to reasonable loan rates and good customer relationship management.

From previously using manual ledger cards to post loan amortization payments and record important account information, they were now using a Microsoft Excel spreadsheet to record such information. However, some of their employees expressed discomfort with computerization as they had gotten so used to manual processing. They continued to use the ledger cards while updating their spreadsheet files later on. This redundancy resulted in a lot of inefficiencies for the company.

Also, even the use of the spreadsheet was becoming difficult to handle because of the huge volume of customer data. Mr. Carandang noticed these inefficiencies and decided the company needed a loans monitoring system that was more secure, efficient and user-friendly. He decided to hire external programmers to develop the system.

However, these programmers were not able to deliver requirements on time. It was then decided the system would be developed internally instead. Although the company had a team of in – house programmers, this was the first time they would be working on a system of this scale — a system deemed integral to the business. This project was put under the supervision of the Management Information Systems (MIS) Head, Janine Cahilig, who now found herself with this unexpected addition to her already full workload of projects and process reviews.

Tasks were delegated and programmers completed various modules of the system separately. During module testing, they realized the system was not running smoothly as a whole because the interconnectivity among the modules was inconsistent. The programmers lacked coordination and clear direction since Ms. Cahilig, who was supposed to be supervising this project, was also busy attending to her other responsibilities. Eventually, the system was finished in less than a year but it used much more manpower, time, money and effort than originally planned.

Guide Question

How can Marc and Janine improve the internal systems development process to aid in – house programmers to become more responsive to developing more complex and innovative software applications for the company in the future?

TEACHING NOTE

This case study can be used in two possible undergraduate business courses: 1) operations management and 2) project management since the focus of the case study can be an evaluation of the internal systems development process that can be tackled from a continuous improvement perspective (operations management) or an ongoing project or project post – mortem evaluation (project management).

The internal systems development process can be improved by doing the following:

1. Make a thorough analysis and evaluation of the project that had just finished. Study the documentation prepared by the in – house programmers to identify points for improvement. Determine what activities were relevant and contributed value to the project. Involve the programmers and consider their inputs to develop clear processes for such projects.

2. Have consistent and continuous documentation of all office processes because this will be the basis for understanding the company's current processes and systems. The programmers need these reference documents to further automate processes and introduce innovations.

3. Plan properly before any project is executed, even for unexpected and rushed projects. Consider constraints such as budget, time and manpower to produce a realistic and feasible plan. Plan for contingencies and give proper allowances. Set clear roles for team members and establish clear lines of accountability for every future project. Develop appropriate goals and expectations so each team member knows what s/he is supposed to do and knows what is expected from the entire project. Knowing the bigger picture helps them evaluate if their progress is still aligned with the project's overall objectives and scope.

4. Organize teams and identify people to lead the teams, especially for bigger projects which could 1) improve task delegation and information flow from management to the team and vice versa, 2) make project approvals and updates more timely and organized and 3) improve cooperation within the team and ensure cohesiveness of their output. Close collaboration is important to determine project status and to easily pass on information about modifications to the plan, additional user requirements and management concerns, among others.

5. Take advantage of proximity of end users in the office to regularly collaborate and get additional information and feedback so the system being developed is undoubtedly what they need. Also, by frequently subjecting the team's work

to end user evaluation, more defects and issues can be identified and addressed early in the development process to avoid further complications and wasted resources in the future.

6. Set clear standards for value and quality. Monitor and check system performance against specified performance indicators. Establish a feedback system and analyze data gathered for continuous improvement.

7. Communicate these improvements to everyone involved. Gain cooperation and more involvement from end users for future endeavors. Use benefits of developing a system internally to their advantage rather than buying from or using the services of the external vendors or programmers they had a negative experience with. Benefits such as reduced miscommunication and misinterpretation, improved coordination, more accurate user requirements analysis and better supervision of value and quality, among others, should outweigh the costs. Otherwise, it may still be better to purchase programs or services from external entities. Nonetheless, they must be sure to get competent external programmers or buy programs from reliable external vendors to avoid the costs and problems they experienced while developing the loans monitoring system.

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