Technology Meets the Case Method: The Use of a Virtual Case in Principles of Marketing

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ABSTRACT

Virtual cases are an approach which has the potential to provide a more involving, timely, and richer student learning experience. By involving the student in developing much of the information needed for the case, information can be more up-to-date than traditional cases. In addition, the virtual case process forces students to grapple with many "real world" problems of finding, sorting and evaluating different information sources to determine what will be most useful and worthwhile for the problem at hand.

The authors describe their first experience with a virtual case in the introductory undergraduate marketing course--problems and benefits experienced from the method from the perspectives of instructors, students, and relative to the traditional case method.

BACKGROUND

Case studies have been used for years in marketing courses to provide students an opportunity for application of principles and tools in a problem solving situation. Cases have ranged from short one to two page cases for in-class discussion to more elaborate "Harvard-like" case studies that include a great amount of detail and information. Video cases are now used in many marketing courses to provide more interest and excitement.

In the introductory marketing course, there has been an interest in bringing the benefits of case analysis to students that are just learning about marketing concepts. One approach has been the use of a single case as the theme for an entire principles of marketing text (see Bernhardt, Kinnear, and Krentler; 1995).

Although cases are intended to develop critical thinking skills among students, there are several impediments to the effective use of cases in the classroom. Student involvement is often a problem - students may not prepare the case effectively (Dröge and Spreng 1996). Although some alternatives to increase broad-based student involvement in cases have been proposed (Dröge and Spreng 1996), students may prepare cases, not because they find the case analysis inherently interesting, but because the instructor has designed procedures that force the student to prepare the case.

Another problem with cases is that the case material can become obsolete in a very short period of time. Marketing is a dynamic field and a textbook case on a company with a successful strategy for selling snowboards to Japan can be bankrupt by the time the textbook is in print. The obsolescence issue is a particular problem when teaching undergraduates who often struggle with the idea of looking at an event in the past and analyzing the situation as it existed at that time. While there are many classic cases and timeless cases that are less susceptible to the obsolescence problem, there is an ongoing need for new, current cases that feature recent developments in marketing.

Textbook publishers are moving forward with Internet based learning, putting texts and cases on-line for students and instructors to select and use as needed. For example, many publishers have dynamic web sites that relate current events to their marketing textbooks (e.g., Prentice Hall's PHLIP at http://www.phlip.marist.edu/). Some books come with interactive cases that on CD-ROM and some may even allow for downloading of case updates (see for instance http://www.hbs.edu/units/marketing/nmedia/intel.html). Additional progress in the expansion of these resources may greatly reduce the problem of outdated cases.

Faculty are also currently using virtual cases that allow immediate updates (see for example http://garnet.acns.fsu.edu/~chofack/im/assign/half sed.html). Innovations such as web conferencing software to create class discussion groups classes are also helping make case analysis a deeper and more interactive experience (e.g., the internet course at the University of Louisville http://dossantos.cbpa.louisville.edu/courses/ecom m/). Instructors now have innumerable options for "conferencing" with students and faculty in their

classes and in other parts of the world (e.g, http://www.ventana.com/html/vc.html; http://screenporch.com/product_description.htm; and the University of British Columbia's Web CT http://homebrew1.cs.ubc.ca/papers/webct/ which provides tools for the development of online courses).

Traditional cases have been criticized as being used primarily for illustration rather than the development of critical thinking. Further, in many instances, students are discouraged from seeking information beyond that in the case (Harris and Stinson 1992). Students, particularly those just recently introduced to cases, often rely solely on the information provided in the case. Providing students with an incentive to conduct some additional research or thinking beyond the information given, is often a challenge for educators making use of teaching cases. The virtual case approach can stimulate more in-depth analysis. Pontes and Heim (1998) describe these benefits as follows:

"*Virtual cases, by design, simulate the business environment more closely than do traditional cases. Marketing managers are not usually given all the relevant information they need to make decisions." "Virtual cases require that students perform their own information searches, which expose them to the vast amount of business information available from the Web and other sources. Students must quickly learn that they must make decisions about information acquisition and that they may often encounter conflicting information. Thus, virtual cases simulate the business environment in so far as marketing managers must not only acquire information, but also must think through conflicting information and opinions before they make decisions."*

THE VIRTUAL CASE IDEA

Frustrated by written cases that are often obsolete in a very short period of time and which may not be as involving for the student due to the more passive nature of traditional cases, the instructors decided to develop a virtual case that would be constructed in essence by the students themselves from secondary information, with a heavy emphasis on the use of the Internet and electronic resources to develop the necessary information. The instructors decided to pilot the concept during summer school in the introductory undergraduate marketing course. Students were fed information on an on-going basis to direct them to look for

certain types of information. The virtual case was a variation on the "living cases" described by Stinson (1990) in which students are confronted with ill-structured problem-situations, without the benefit of prior preparation, and challenged to define the problem and decide on what actions are to be taken.

The objective of the virtual case project was to have students write a marketing plan. Collaboration on research was not discouraged, as the richness of any one student's analysis was dependent on not only what type of information they uncovered but also their interpretation and analysis.

Students were introduced to case analysis with traditional cases that were discussed in class. The instructors developed a "Case of the Week" theme that expanded upon text cases or created new cases that allowed for extension and application for that week's topics. A case was selected for an entire week and all the topics discussed that week were tied directly to this case. This allowed for more in-depth discussion on a particular company or organization as well as illustrating multiple marketing issues within a single case.

The use of the Internet was integrated into several aspects of the course. For example, students were asked to visit certain web sites, participate in the course discussion group, as part of several short Internet and web related assignments. Many students embraced this concept by submitting assignments by e-mail, by sending drafts of assignments or the final virtual case to the instructors for view and critique prior to due dates. A class alias was established for the communication among the entire class. The use of the Internet for data gathering from "real" sites set this method apart from the typical "electronic case" where data relevant to a particular problem situation is duplicated by the instructor and made available to the students electronically, which, in essence, provides a more focused domain for the students' research (Harris and Stinson 1992).

IMPLEMENTATION OF THE IDEA

The premise of the virtual case was that the instructors had been bequeathed ownership of 30 outlets of a major pizza chain in a major metropolitan area. As consultants to the instructors, students were to individually develop a marketing plan for the fortunate instructors to assess what type of marketing opportunity exists and how to

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best exploit this opportunity. At the outset (early in the session), this was about all that the students were told. This forced students to consider strategic issues and needed research early.

The actual amount of information given to the students was limited. For example, a copy of the Yellow Page ad for the instructor "owned" restaurants was given to the students but not a list of competitors. Additional information and feedback on the case was provided frequently by e-mail in addition to answering any questions face-to-face in or out of class time.

Throughout the session, students were selectively fed additional information on the case. The case was "dynamic" in the sense that the type and amount of information that was fed to the students depended on the content of the regular assignments that the students turned into the instructors. At regular intervals, students were required to turn in assignments that composed parts of the marketing plan. For example, students had to turn in an analysis of competitors and an estimation of demand. Later, they also turned in summaries of their marketing mix strategies. Along with the "assignments" (which were structured as memos to the "consultants"), students were fed suggestions for sources of information. That is, they were directed to resources such as the Simmons Study of Media and Markets, the Pizza Hut Web site, etc. Occasionally, a student would find an outstanding resource on the web or in the library. Students were given several opportunities to share such information—either they could use e-mail, the class web discussion group, or the instructors sometime mentioned the resource in passing when sending the next "memo" out to the consultants.

The class e-mail alias and web discussion group was utilized frequently to encourage communication among students. For example, after completing the demand estimate assignment that would become one portion of the finished marketing plan, students were encouraged to post the method by which they had estimated demand so that all could learn and benefit from exposure to a number of different ideas.

RESULTS

Instructors. We felt that the students tended to become more involved in the virtual case than they might with a traditional case or marketing plan project. A number of students took

advantage of the opportunity to e-mail portions of assignments or the marketing plan to the instructors for feedback and comments prior to the actual due date. Although students were each asked to write their own marketing plan, there was plenty of opportunity for collaboration that actually seemed to provide little incentive for cheating on the project. Since the focus of the marketing plan was not reiterating facts but a critical analysis of the information to draw conclusions, if resources such as web-sites were shared, it didn't translate into the same interpretation or marketing mix recommendations. There were also some benefits to having everyone working on the same project in a short time period as our resources and assistance was focused on one type of project and it was easier to compare progress and output across the students in the class.

One of the biggest problems for the instructors was that one or two nontraditional students appeared to have not completed lower division prerequisites that introduced them to the use of the internet and e-mail or had fulfilled the course requirement at a time before these subjects were covered in-depth. One of these students insisted on trying to have the instructor solve home computer problems in spite of the fact that campus computers for accessing e-mail and the Internet were available right outside the classroom door.

Students. The students had a tremendous incentive to use e-mail and the Internet in order to communicate with the instructors about the pizza opportunity. Surprisingly however, almost half (42%) of the students completing an end of quarter survey reported that they did not use e-mail for any Principles of Marketing related work during the term. This is rather amazing given that students would have been unable to complete several assignments without accessing e-mail. One interpretation of this finding is that students interpreted the question differently. Some interpreted use of e-mail as accessing e-mail messages from the instructors, others as two way communication, and some saw the questions as asking whether they actually used e-mail to communicate with anyone else in the class.

While most of the class (75%) somewhat to strongly agreed that the use of the WWW in the class was interesting and (83%) somewhat to strongly agreed that faculty use of the WWW in their classes is useful to students, those that did not agree tended to not use e-mail.

Written comments were either extremely enthusiastic or very negative. For example, one student wrote: "I liked the fact that we were forced to use it (the WWW). Everyone in college should be able to use these basic functions." "I like keeping up-to-date on things in the class". However, complaints about the marketing plan centered on choice (wanting to select their own topic) and desire to work in teams rather than on the use of technology or the virtual case concept itself. Self-selecting projects was rejected as an option by the instructors initially because we were concerned that this might mean that some students would not have as much opportunity to use the Internet or would try to avoid using the Internet. Team projects was also rejected as an option due to small class size and the fact that a significant number of students were nontraditional compounding problems for groups to meet outside of class.

Benefits over traditional cases. Our virtual case trial did result in a current, timely project for the students. The method necessitated greater student involvement in the project by its very nature--much of the case information had to be developed by the student. The process made it imperative for the students to conduct outside research. In fact, exchange of research sources and discussion about how to resolve discrepancies in different information that was collected was encouraged.

CONCLUSION

The virtual case method has merit. Most students seemed to enjoy the project and benefit from the interactive and on-going case method, conducting research, and completing sections of the final marketing plan as assignments. Since students were given limited information and were given ample opportunities to share information among themselves, it quickly became apparent to the students that we were interested in the critical analysis and interpretation of information rather than just a regurgitation of a series of facts. One reason this worked was that we consistently reminded the students that they were welcome to submit drafts of their marketing plan to us for feedback before they were due. Thus, although there was initially considerable uncertainty on the part of the students as to what was expected, students were allowed to run their ideas by us to "see if they were on the right track." We were thus able to guide students individually based on their perceived weaknesses. This is quite different from

the traditional case method where students are usually guided by the professor to the one "right answer." The virtual dynamic case allows students to develop their own thinking skills instead of being told what to think.

Future research might focus on a number of areas including comparing the classroom performance of students using a virtual case approach with those using traditional case methods, whether certain learning styles benefit more from the use of the virtual case approach, experimenting with virtual teams working on virtual cases. With a longer time period it might be possible for students to work with others at their own and or at other universities on virtual case projects that have international or regional dimensions creating a sort of virtual team for a virtual case.

There is still resistance among a few students to the use of technology, e-mail, and the Internet. It may be quite overwhelming for some students to absorb introductory marketing concepts as well as e-mail and Internet if they have not had much exposure of use of these tools in the past. An assumption we made was that entering students were comfortable with the use of e-mail and the WWW. This proved to be a problem with a few of the students.

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