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TEACHING CASES ONLINE
THE BASICS

While teaching cases online involves many of the same approaches as teaching cases in a physical classroom, there are still major differences. Luckily, once you have done the upfront work of planning for an online course, many aspects can be preserved for future semesters which make them very easy to reproduce. We hope this guide can alleviate some of the pain points of transitioning to an online classroom, especially while using cases.

→ This guide was adapted from Bill Schiano and Espen Andersen's "Teaching with Cases Online," (Boston: Harvard Business Publishing, 2017).

PREPARING TO TEACH CASES
ONLINE

ONLINE TEACHING FORMATS:
Synchronous and Asynchronous

In online case teaching, interactions with students may be synchronous (at a designated time via Zoom, for example) or asynchronous, in which students discuss elements of a case in a learning management system (LMS) or discussion forum.

As in face-to-face classes, online case teaching starts with learning objectives that are broken into chunks with corresponding cases and exercises that let the students deduce and apply theory. The main difference lies in the design of teaching each individual case—an instructor has to be more explicit about the discussion structure and be much more specific about how and when people get access to the certain major topics (or "discussion pastures"). Especially in the asynchronous format, in which an individual case discussion could take a week, you will need an adjusted understanding of timing.

Using both synchronous and asynchronous time for your class will allow you to span case discussions across multiple "meetings." You might open the discussion in an asynchronous forum and then complete it in synchronous mode. You can also use the asynchronous forums to continue a discussion you started in the synchronous class time. This can offer wonderful opportunities to drill into details that you did not have time to address synchronously.

Students can more easily explore multimedia case elements in an asynchronous format.

Selecting Cases to Use Online

A case that develops beautifully in a physical classroom may not work as well online since you can't make use of the energy available to you when present in person.

Here are some attributes that are helpful in choosing a case for an online class:

Compelling company, industry, or protagonist. Would students be eager to work in this company? Is the case of specific economic or social interest? Is the protagonist interesting?

Recency. Students prefer newer cases. While there are many good older cases, dated material increases the need to convince students that preparing these cases is worthwhile.

Novelty. Can you create variety in style or content? The **iPremier** case by Robert Austin, for instance, is also available in a graphic novel edition.

Use of multimedia. Cases with online components—such as video, audio, or dynamic graphics— fit well in an online course. The variety of multimedia elements can be more easily explored in an asynchronous format as well.

Well written and accessible. Using too many cases that employ complicated or overly sophisticated language can be fatiguing for students over the course of a semester, especially if you have international students in your class.

Areas of tension and conflict. Look for cases that are likely to provoke strong feelings, particularly with disagreement within the class. You may want to emphasize the conflicts in cases to engender better discussion (but be careful so students don't lose their cool).

Multipart. A multipart case is one with B and C (and sometimes even more) cases. These can energize a discussion and facilitate transitioning to a new pasture. Additionally, you could follow a single case with other "cases" if you have other supplemental materials that work well. You could also transform long cases into multipart ones.

Complex. If you manage the discussion sequence well, you can use more complex cases. Also, discussion of each part of a complex case can happen across multiple assignment periods. However, long complex cases are generally not a recipe for engagement, so they are best left for later in the course, after students are used to the process.

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Planning and Using Shared Visual Space

A board in a synchronous online session will be a portion of the screen under the control of the teacher, and perhaps of the entire class. Simplicity is paramount, as is having a fallback position should the technology cease to cooperate. Options for using an online board include the following:

Pre-produced slides. Preparing detailed slides before class can make discussion seem predetermined. One variation is to use slides with only pre-produced discussion topic headers.

Live typing. This has the advantage of legibility, and depending on your typing speed, it can be as fast as or faster than using a traditional board. A quiet keyboard and good isolation for your microphone are important if you go this route. For most discussions, this remains our preferred method.

Voice recognition. Most of the time, what you want on the board is not a transcription of words spoken but a distillation, so the value of voice recognition is limited for synchronous teaching.

Handwriting. Stylus technologies can allow you to write well on many touch screens, which could approximate a chalkboard. But on many systems, there is a noticeable lag between your hand movements and what appears on the screen. Be sure to test before using in class.

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Preparing for Different Types of Students

As in an in-person class, you will usually deal with a variety of students online with different backgrounds, cultures, knowledge, personalities, and learning styles. In general, undergraduates have less experience to draw on and a higher tendency to offer rote answers, while graduate students can be good at theoretical discussions and may have some real-world experience to reference in their arguments. (Executives tend to have lots of experience but sometimes see things from narrow perspectives.)

Often there will be a handful of students whose native language is not the one spoken in your classroom. If appropriate, look for translations and clarify your objectives and expectations. Cultural issues may also exist. In some parts of the world, students will contribute what they think the teacher wants, whereas in others, demonstrating mastery of details and opposing the teacher are seen as the way to excel.

Finally, the students who are often quiet and sometimes uncomfortable speaking out in an in-person class often will still feel that way online. However, online learning gives you a few more avenues for participation than a face-to-face classroom does. Encouraging student to participate in your LMS discussion board during asynchronous times could help to pull out the quieter students. Breakout rooms and warm calling are also often good ways to get quieter students to engage more vocally with the case discussion.

If students are given a structure for understanding a challenging case, they often put in much more effort.

Engaging Students

Engaging students is one of the greatest challenges in online teaching. To what extent are students preparing? Posting in discussions? Thinking deeply about the material? Engaging with each other?

Introduce cases with some context to motivate students to prepare: "Prior students have found the next case to be challenging, but I use it to unearth the details of an important management problem. A good way to approach it is to focus on this particular story line …" If students are given a structure for understanding a challenging case, they often put in much more effort. Here are a few other ways you can engage your students in a case discussion:

Project enthusiasm. Even if it feels inauthentic, it is critical that you show enthusiasm at the outset to build momentum; otherwise, online teaching can feel detached to students because of the lack of subtle signals sent in person.

Start early. Make the opening of your course as case-based and interactive as possible. If passivity gets a foothold in class, transitioning to a student-centered course becomes difficult.

Sell, sell, sell. Promote the value of the case method regularly and imaginatively. For business students, links to career skills and job-hunting success are particularly helpful.

Use more cases. If cases are seen as a minor part of the course, or mainly used to illustrate other points, there is little incentive for students to invest deeply in preparing them.

Employ breakout rooms. All kinds of group work in a physical classroom can be turned into activities for breakout rooms: discussing questions, brainstorming strategies, solving problems, or working on a long-term course project.

Use warm calls publicly and privately. Calling out individual students can be useful. In a synchronous meeting this can be done directly as a cold call. In an asynchronous class (with some exceptions when timer-based tools are used) calls are warm at best, as students have time to think before responding. These calls can be done publicly in front of the group or privately via email or other channels. Private calls can be particularly helpful when drawing out reticent students or trying to change a student's tenor in the discussions.

If you have nonnative speakers, declare a general amnesty for spelling mistakes and messy language. Be aware that some comments translated from other languages can seem more aggressive or less clear than they are meant. Remind people during synchronous discussions to show courtesy to students who need a bit more time to think when answering.

If you have nonnative speakers, **declare a general amnesty** for spelling mistakes and messy language.

Teaching Asynchronously

Particularly for asynchronous discussions, we suggest making each question as immersive as possible:

Make things crystal clear. You should certainly open up broad and complex questions, but don't make the *wording* of those questions complex. Be a very rigorous editor of yourself.

Evoke emotions. Use any devices you have to enhance engagement. For example, "If your best friend/sibling/ partner were in this situation, how would you advise them?"

Polarize. Craft questions on which students will disagree, or assign students to opposing groups. "For this discussion, if your last name begins with A through M, assume you are the VP of risk management, and if your last name begins with N through Z, assume you are VP of sales."

Put students in a role. Have them respond as a case protagonist, a board member, an analyst, a consultant, a blogger, or any other role that will give them a particular perspective.

Follow up. Follow-up questions can be tricky in an asynchronous discussion because there may be many comments made in response before you begin. When possible, try to incorporate the existing responses into your question so you do not seem to be ignoring the flow of the discussion. If there is an issue you want to address that other students did not pursue, acknowledge that you are taking a different tack.

Handling special challenges. Asynchronous discussions offer additional options to manage special challenges. You can delete offending comments, though this is a drastic measure. We always prefer to have the authors revise or delete them or post clarifications/apologies—unless there is something particularly egregious. You can also handle such challenges privately.
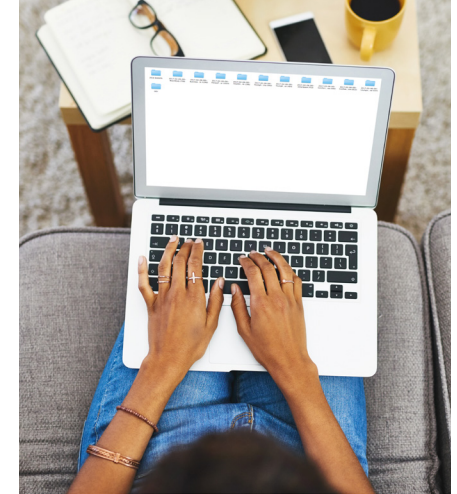
Ending a Case Discussion

Once a case discussion ends, students and faculty often want to summarize what has been learned. There are many techniques, but they all come with a caveat: avoid providing a neat summary yourself.

You don't want to make it seem there was a right answer you were expecting all along. Having students summarize the learning points is often more valuable than summarizing yourself. This is also a helpful mechanism for you to assess what they have learned. If you are going to offer a summary, consider not doing it after each case and making your wrap up about much more than simply the conclusion from a given case. Leaving students with a question rather than a conclusion is an effective way to help students remember what they have learned.

Grading Participation

The gold standard for judging the quality of participation is to read and evaluate the comments of students in the context of the discussions.

For grading asynchronous participation, you can do this using the same basic method you use for evaluating class participation in traditional classrooms, except here you can keep your gradebook open and pause whenever you like without disrupting the flow of the discussion. Additionally, the LMS you're using should be able to provide data on the number of times students have viewed pages and posted.

Having students give feedback for grades can also be useful. Student self-evaluations could identify their best comments for each case. You can have students peer rank posts in different discussions, giving some weight to what classmates thought of a student's comments. Ask for students to summarize discussions and evaluate each other for group work (do at least some of your evaluation at the group level).

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As more people and technologies become involved in online learning, new approaches and capabilities will arise along with new questions. Please send your questions and insights regarding online case teaching to us at editorial@hbsp.harvard.edu so we can share emerging best practices with other educators!

→ **ACCESS OUR TEACHING ONLINE RESOURCES**
hbsp.harvard.edu/teaching-online-resources

Top Ten Tips for Teaching Cases Online

1. Understand the pros and cons of synchronous and asynchronous teaching and plan your course around the two methods.

2. Calibrate your materials and online approach to the kinds of students that will attend your class.

3. Select cases that energize your students before you start class discussion.

4. Introduce cases with some context to motivate students to prepare; be transparent about why you're using them.

5. Familiarize yourself with the pros and cons of the different whiteboard technologies to optimize their use in a synchronous discussion.

6. Engage students with cases by sharing your enthusiasm for them and by creating tension and drama in classroom discussion.

7. Consider the potential linguistic and cultural challenges facing students who are nonnative speakers in a particular classroom.

8. Use clear and straightforward language when posting questions in an asynchronous context.

9. Debrief cases using many approaches and avoid suggesting there was only one right answer.

10. Embrace the advantages of online tools such as quantitative tracking of participation and online breakout rooms.