Teaching Cases in Business & Management Education: Design, Structure, and Classroom Strategy
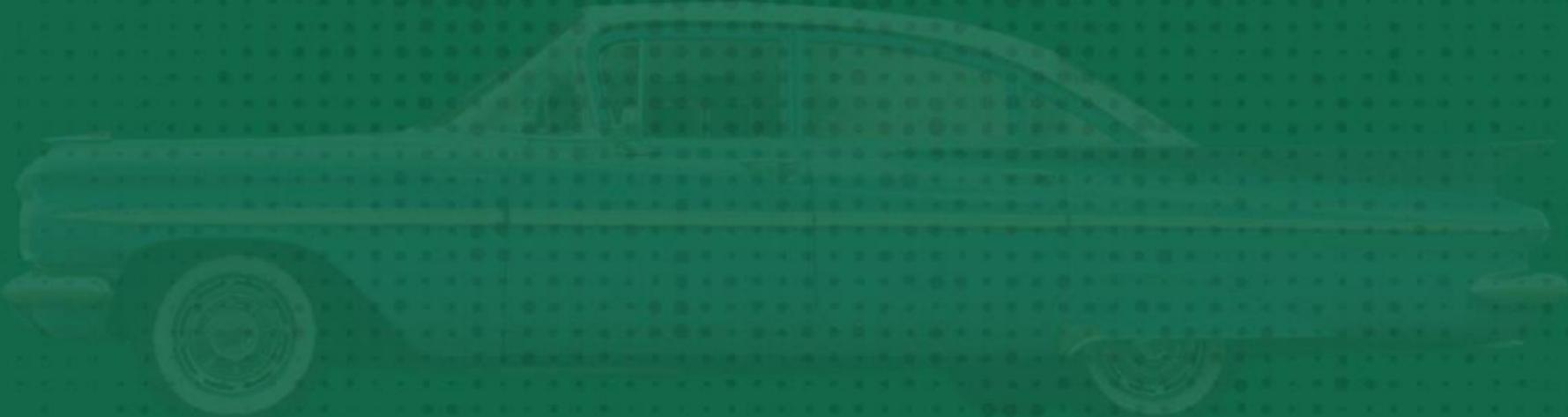
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Teaching Cases in Business & Management Education

Design, Structure, and Classroom Strategy

Professor Seun Kolade, Sheffield Business School, 25th February 2026

Today's agenda

By the end of this session, participants will be able to:

- Distinguish between a teaching case and a research case in purpose and structure.

- Identify and evaluate the essential components of a high-quality teaching case (hook, protagonist, tension, decisional focus).

- Analyse case narratives to assess alignment with specific learning objectives.

- Critically reflect on strategies for facilitating rigorous, discussion-based case teaching in higher education.

Why Teaching Cases?

Real-life Decisions

- Real-life decision-making simulations
- Mirror business challenges
- Require practical choices under uncertainty

Role Immersion

- Students step into protagonist's shoes
- Experience perspectives and constraints "firsthand"
- Face consequences of decisions

Critical Skills

- Develop analytical and synthesis skills
- Evaluate evidence and structured reasoning
- Design well-supported solutions

Theory to Practice

- Bridge theory and practice
- Apply academic frameworks to concrete situations
- Test assumptions in real context

Dialogue & Debate

- Encourage dialogue and multiple perspectives
- Surface diverse solutions
- Improve decision quality through debate

→ Show correct answer

Brief History of the Teaching Case

Origins

1

The method traces its roots to Socratic dialogue and Aristotelian argumentation, emphasizing questioning, debate, and analysis as core pedagogical techniques.

Harvard Formalisation

2

The case method was formalised at Harvard Law School in the late 19th century, establishing structured case discussion as a central teaching practice.

Business Adoption

3

It was later adopted widely in business schools following the HBS model, adapting legal case practices to managerial and decision-making education.

Global Cornerstone

4

Over the 20th century the teaching case became a global cornerstone of management education, used by institutions worldwide to develop practical leadership skills.

Digital Expansion

5

In recent years the format has expanded into digital, multimedia, and mini-case formats, broadening accessibility and enabling interactive learning experiences.

What is a Teaching Case?

Realistic Snapshot

- Vivid snapshot of actual management situation

- Presents concrete context

- Features real actors and circumstances

Problem Focused

- Focuses on problem, challenge, or opportunity

- Requires analysis, not just facts

- Demands critical evaluation

Decision-Maker Role

- Students assume decision-maker's role

- Make choices based on available information

- Weigh trade-offs and consequences

Story Format

- Written as a story with narrative flow

- Includes realistic detail

- Not an academic article or abstract

Key Characteristics of a Teaching Case

Has a clear hook (overriding issue)

- Opens with compelling overriding issue
- Immediately engages readers
- Sets context and frames primary dilemma

Decision/action focus

- Centers on concrete decision or action point
- Requires evaluation of options
- Justifies practical steps under realistic constraints

Written in past tense, third person

- Maintains academic distance
- Provides clarity of events
- Supports objective discussion and analysis

No embedded analysis or lessons learned

- Avoids explicit analysis or prescriptions
- Learners must interpret evidence
- Students derive their own conclusions during discussion

Encourages ambiguity and competing alternatives

- Preserves ambiguity in scenario
- Presents plausible competing alternatives
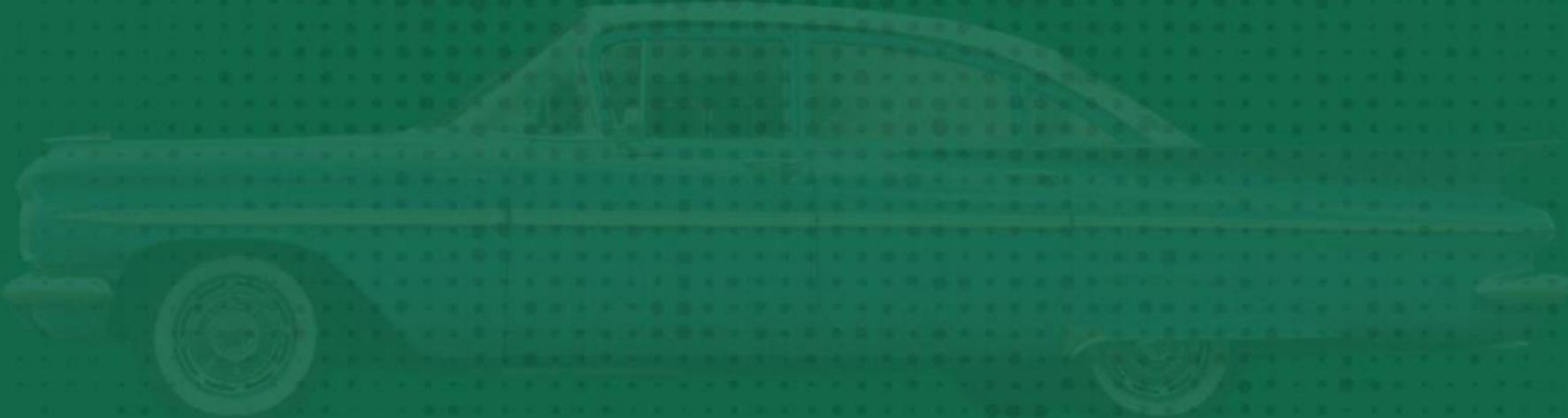- Prompts critical thinking and rich debate

Teaching Case vs Research Case

Teaching Case

- Theory is implicit and applied by students

- Encourages dialogue and multiple interpretations

- Withholds authorial judgement

Research Case

- Theory is explicit and applied by the author

- Provides structured analysis

- Advances scholarly contribution

Core Design Questions Before Writing

Question 1

What theory or concepts will this case teach?

Question 2

What is the hook or decision focus?

Question 3

Is there urgency, tension, or ambiguity?

Question 4

Is it sufficiently rich in context?

Question 5

How will students react?

What is the single most common weakness you observe in teaching cases?

Outdated cases

Too long / does not meet the requirements of the audience / no reflective exercise for students

Not interesting to students

Data overload

Might not apply to all learners

Subjectivity. Takes time.

Not allowing students enough time to analyse/evaluate AND/OR feedback and explain their evaluation.

Lack of visuals

Lack of a sharp decision focus.

Unclear context

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Standard Structure of a Teaching Case

Step 1: Opening (Hook)

- Presents compelling hook that captures attention
- Frames the central dilemma
- Motivates learners to engage through provocative scenario

Step 2: Background (Industry/Organisation)

- Supplies essential context about industry and organization
- Includes relevant history and market dynamics
- Provides operational details needed to understand the problem

Step 3: Case Story (Development of Issue)

- Narrates events and decisions over time
- Details stakeholders and actions taken
- Illustrates how central issue evolved and intensified

Step 4: Closing (Decision Point)

- Presents clear decision point with no prescribed answer
- Prompts analysis and discussion
- Requires application of frameworks for independent judgment

The Opening: The Hook

Protagonist

Introduce the main character and their role to immediately anchor the audience in who the story follows.

Decision

Clarify the pivotal decision that the protagonist must make, defining the central conflict of the narrative.

When & Where

Specify the time and location to ground the scene and give context to the stakes and constraints.

Urgency

Explain why the decision is urgent, highlighting consequences or a ticking clock to heighten tension.

Overriding Questions

End with one or two compelling, overarching questions that propel curiosity and invite the audience to keep reading.

Background Section

Industry context

- Market experiencing accelerated digital transformation
- Increased competition from startups and established players
- Key trends: consolidation, rising customer expectations, margin pressure

Company context

- Leading position in niche segments
- Strengths in product reliability and customer support
- Challenges in scaling operations and international expansion

Relevant historical information

- Steady revenue growth over past three years
- Two core product launches and expanded channel network
- Margin compression from increased customer acquisition spend

Decision-relevant information only

- Focus on metrics impacting strategic choices
- Include: revenue trends, customer churn, cost-to-serve
- Exclude operational minutiae and anecdotal details

Use exhibits, tables, and visuals

- Complement with revenue trend chart
- Add customer segmentation table
- Include competitive positioning exhibit

The Case Story (Body)

Chronological Development

- Outlines how events unfolded over time
- Highlights key milestones and turning points
- Shows decisions that shaped case trajectory

Multiple Perspectives

- Different stakeholders bring varied viewpoints
- Includes management, customers, regulators, partners
- Each influences interpretations and solutions

Tension and Dilemma

- Conflicts from competing goals and scarce resources
- Creates ethical dilemmas
- Generates strategic tensions that complicate resolution

Competing Alternatives

- Several viable options on the table
- Each with trade-offs in cost, risk, and impact
- Requires careful evaluation and prioritization

Easy to Read, Hard to Solve

- Narrative is accessible and clearly presented
- Underlying complexity makes solution difficult
- Interdependencies challenge consensus-driven solutions

The Closing Section

Reiterate the Decision

- Summarize the central choice clearly

- Restate key options

- Highlight critical factors making decision pivotal

Return to Protagonist

- Re-center narrative on protagonist's perspective

- Highlight their stakes and emotions

- Emphasize personal consequences of chosen path

Raise a Deeper Question

- Introduce broader or probing question

- Elevate discussion beyond immediate outcomes

- Prompt reflection on implications and values

Create an Intellectual Pause

- Craft moment of deliberate pause

- Invite consideration of alternatives and assumptions

- Prepare audience for forthcoming discussion
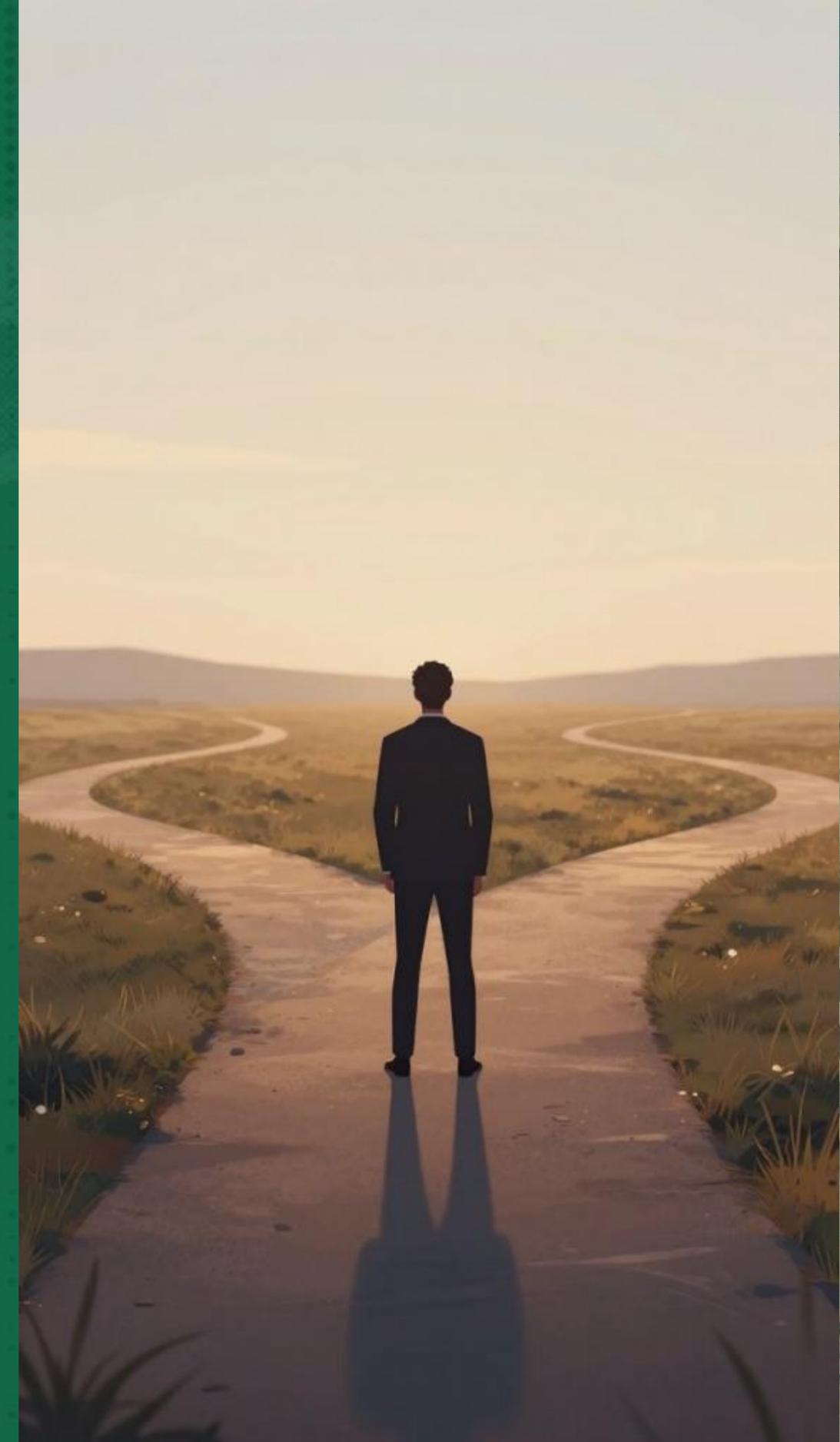
Case Example 1: Warby Parker (Yale SOM, 2025)

1 Warby Parker founded by Wharton MBAs frustrated with excessive costs of eyewear

2 Entered industry dominated by vertically integrated incumbents controlling manufacturing and retail

3 Launched disruptive online-only model offering stylish prescription glasses at $95

4 Integrated Buy a Pair, Give a Pair social impact model from inception

5 Secured B Corporation certification reinforcing dual commitment to profit and purpose

6 Expanded into physical retail after observing customers' preference for in-person try-ons

7 Codified core values such as "Do Good" and "Learn. Grow. Repeat."

8 Transitioned to public benefit corporation prior to 2021 direct listing

9 Encountered investor scrutiny over profitability versus long-term stakeholder commitments

10 Central dilemma: how to scale culture, purpose, and financial performance sustainably

Discussion: Identifying Teaching Case Structure (Warby Parker)

1 Where exactly is the hook and focal decision introduced?

2 Who is the protagonist, and what role do students assume?

3 How does the case build tension between profit and purpose?

4 Is the background information sufficiently rich yet decision-relevant?

5 Does the closing sharpen the dilemma or diffuse it? How might you improve it?

Case Example 2: Girl Effect (Yale School of Public Health)

1

Girl Effect established to empower adolescent girls as drivers of social change

2

Positioned girls as catalysts for economic growth and community transformation

3

Employed media, branding, and storytelling to shift entrenched cultural norms

4

Built cross-sector partnerships spanning NGOs, governments, and philanthropic donors

5

Sought measurable improvements in education, health, and financial inclusion outcomes

6

Balanced aspirational narratives with demands for rigorous impact evaluation evidence

7

Faced strategic tension between donor reporting cycles and systemic change timelines

8

Encountered governance and scaling challenges across diverse national contexts

9

Needed to defend resource allocation amidst evolving philanthropic priorities

10

Central dilemma: sustaining legitimacy, funding, and measurable impact while scaling innovation

Right sidebar image: classroom scene showing girls engaged in learning and empowerment activities

Discussion: Identifying Teaching Case Structure (Girl Effect)

1
1

What is the clearest decision point or strategic dilemma in this case?

2
2

How effectively does the opening establish urgency and stakes?

3
3

Where do we see competing perspectives or stakeholder tensions?

4
4

Does the case maintain neutrality without embedding analysis?

5
5

What specific learning objectives could this case strongly support?

What Makes a Great Teaching Case?

Sharp decision focus

- Centers on clear decision point
- Forces weighing of alternatives and tradeoffs
- Requires justified course of action based on evidence

Clear urgency and deadline

- Includes time pressure or deadline
- Raises stakes and drives prioritization
- Prompts realistic decision-making under constraints

Dramatic tension or controversy

- Conflict and competing views create tension
- Engages learners emotionally and intellectually
- Stimulates debate and critical reflection

Alignment with learning objectives

- Designed to practice targeted skills and concepts
- Activities map to intended learning outcomes
- Questions and assessments explicitly aligned

Encourages analysis and synthesis skills

- Requires data analysis and issue identification
- Synthesizes information from multiple sources
- Constructs well-reasoned recommendations

Preparing to Teach a Case

1

1) Start with the teaching note

Read the teaching note thoroughly to understand the case background, instructor guidance, expected answers, and key teaching points.

2

2) Define learning objectives

Specify clear learning objectives for students, including knowledge, analytical skills, and discussion outcomes to be achieved.

3

3) Develop discussion questions

Create open-ended, scaffolded questions that guide students from comprehension to analysis and application during class discussion.

4

4) Identify analytical tools/models

Select relevant frameworks, models, or analytical tools students should use to structure their analysis and support conclusions.

5

5) Plan timing and board mapping

Allocate time for each discussion segment and prepare board mapping or slide notes to capture key points and steer the conversation.

Facilitating Case Discussion

Cold Calling

- Use structured participation methods

- Ensure all students prepare

- Keep engagement equitable and focused

Small Group Breakouts

- Organize brief breakout groups for peer discussion

- Reconvene to share insights

- Enable more voices to be heard

Role Play

- Assign roles like protagonist and stakeholders

- Students embody perspectives and practice arguments

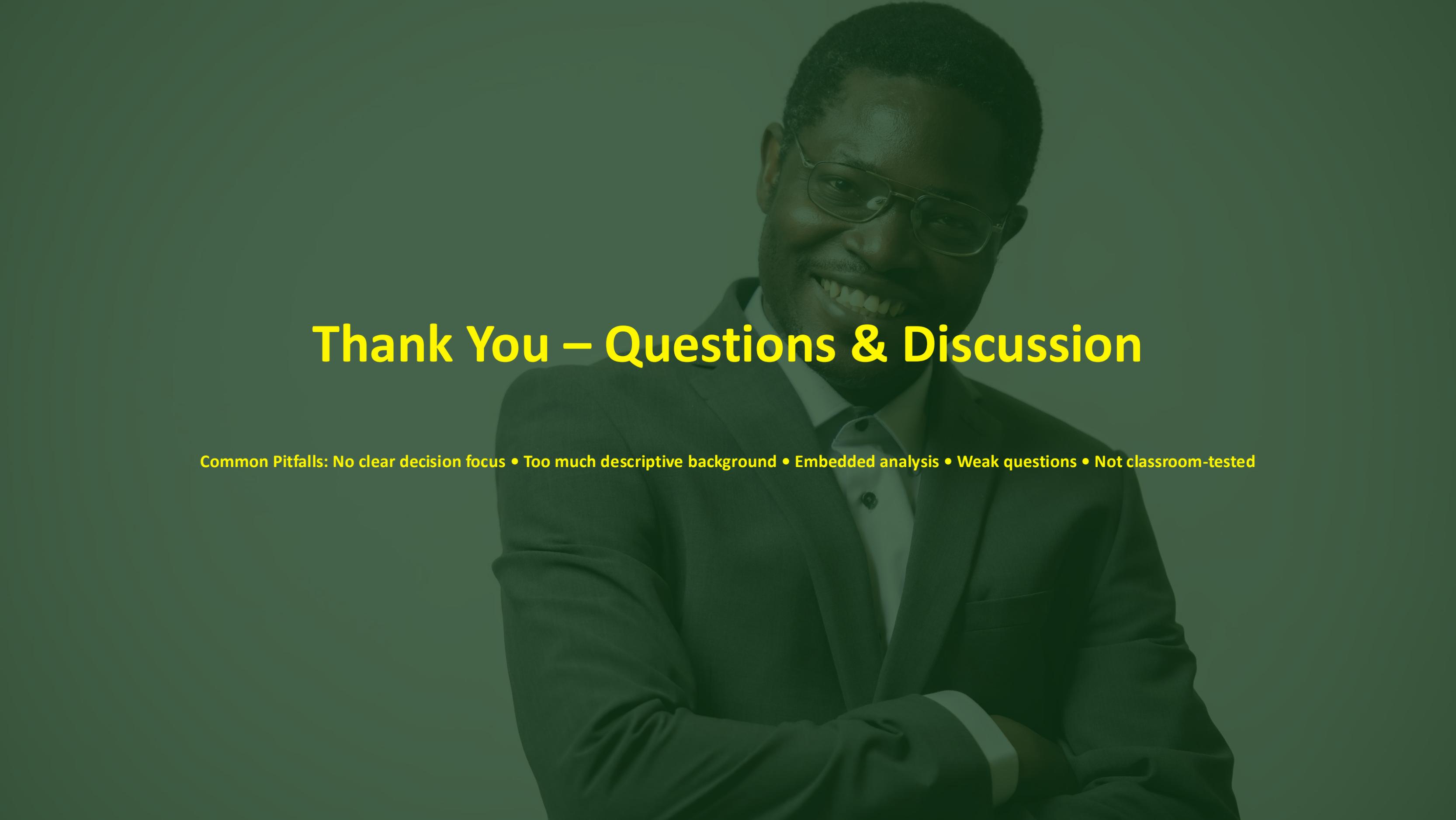- Explore situational dynamics actively

Multiple Interpretations

- Encourage varied readings of the case

- Ask students to present alternative interpretations

- Support each viewpoint with evidence

Facilitator Role

- Adopt guiding stance, not lecturing

- Ask probing questions and synthesize contributions

- Steer reflection without dominating discussion

Thank You – Questions & Discussion

Common Pitfalls: No clear decision focus • Too much descriptive background • Embedded analysis • Weak questions • Not classroom-tested