

The Customer-Consultant Method of Case Studies

Timothy E. Trombley
Illinois State University

This article proposes a novel method of teaching a case study to business students that has been developed and used in intermediate MBA and capstone undergraduate finance courses. This method has two goals. First, it aims to increase student engagement with the material. Second, it aims to teach students a new skill that is frequently neglected: how to ask questions in a professional business setting. Additionally, this article gives advice on how to critique a class of students that is using this method.

STUDENT ENGAGEMENT IN CASE STUDIES

Case studies have been shown to be helpful in improving students' learning, exam scores, and their overall satisfaction with the course (Askell-Williams, Murray-Harvey, and Lawson, 2007; Escartin et al., 2015). One of the primary reasons for this is thought to be due to increasing the level of student engagement (Kuh, 2009; Krain, 2010; Escartin et al., 2015) and, similarly, due to reducing student boredom (Sandstrom, 2006).

However, one of the weaknesses of many in-class case study methods is that a large portion of the class is not active participants in solving the case study. The passive listeners are rarely more engaged than they are in a lecture class, and in practice the students who know they are scheduled to be passive listeners will rarely read the case ahead of time. While the passive listeners can obtain other benefits from case studies (such as dealing with ambiguity, dealing with the existence of more than one correct solution, and distinguishing between fact and opinion (Weil, Oyelere, Yeoh, and Firer, 2001)), and while case studies can still do a much better job of engaging the students who are actively participating than other teaching styles, there is much room for improvement in student engagement.

There are several established ways to improve student engagement in case studies. Instructors can engage the students' senses in multiple ways, such as using videos as exhibits in the case (Krain, 2010). Instructors can use the Live Case method (Rashford and Neiva de Figueiredo, 2011), in which a business executive presents a problem to the class that students solve in real time. Similarly, instructors can do a semi-live case where students are guided through how they can gather information about the firm using the school's library resources (Sherman and Martin, 2011). Instructors can engage in case study competitions (Burke, Carter, and Hughey, 2013). Instructors can also have multiple student groups present the same case.

This paper proposes a new method of increasing student engagement with cases: the Customer-Consultant method. This method has the advantage that it increases the number of students who must actively pay attention to and engage in the case. It can be applied to nearly any business case study, and requires no additional materials or guest speakers. It also aims to teach students a new skill: the skill of how to ask good questions.

THE SKILL OF ASKING QUESTIONS

"In the past, the leader was the person who came up with the right answers; in the future, the leader will be the person who comes up with the right questions." - Peter Drucker (Drucker, 2008)

The ability to ask meaningful questions is a crucially important life skill. This is particularly the case for leaders (Gregersen, 2018; Baker and Gilkey, 2020; Hagel, 2021).

However, Wilkinson and Spinelli (1982) argue that students who successfully learn to ask questions in a classroom setting learn this skill implicitly; teachers rarely formally teach this skill. Cohen (2011) bemoans this state of affairs, stating that, "Business schools don't teach courses on question asking, so leaders typically don't study and analyze questions the way they would a quarterly report or a performance review."

Further, in my experience, even students who teach themselves to be good at asking questions of their teachers often fail to learn the skills required to ask meaningful questions in a modern corporate setting. Students frequently are hesitant to ask tough questions, or to ask follow-up questions when the question is misunderstood, or

to ask follow-up questions when the presenter's answer brings up an even more interesting question. In surveys of my students, the most frequently cited reason for this hesitation is that they are afraid of being perceived as rude.

Asking good follow-up questions is a crucially important piece of asking good questions. Howard Will (1987) argues that follow-up questions pose a challenge because leaders are not sure of the answers to their original questions, making it difficult to plan the follow-up questions ahead of time. He argues that it is both difficult and exhausting to listen to a response, think it through, and then immediately ask a follow-up question that "reflects both the participant's response and the leader's question." In other words, asking follow-up questions is a particularly difficult skill that combines conversational skills, critical thinking skills, and the type of quick-thinking skills that Malcolm Gladwell (2005) refers to as "the power of thinking without thinking."

This deficiency has been exacerbated by recent society-wide trends. The Social Media Age has prioritized email and text chats over conversations, which allow us the luxury of time to think about our responses. The social isolation of the COVID-19 pandemic reduced social interactions. This has had a negative effect on conversation skills, particularly among the children who will be entering business schools over the next decade (Freitas, Del Prette, and Del Prette, 2020; Campbell, 2021). Together, the result has been a society-wide reduction in the amount of time spent practicing the important skill of critically engaging others in a series of questions.

The Customer-Consultant method is an attempt to teach question-asking skills while simultaneously retaining the other benefits of case studies. As a side effect, more students are actively involved in the discussion, increasing student engagement.

THE CUSTOMER-CONSULTANT METHOD

In the Customer-Consultant method, one group of students orally presents their solution to the case as if they are Consultants who are hired to provide a solution to the problem (similar to many other methods of teaching case studies). However, they are not presenting to the class as a whole, nor are they presenting to the instructor. Rather, they are presenting to a second group of students who acts as the Customers.

The Customers' job is to determine if the Consultants' recommendation should be followed. To do this, they need to ask questions to clarify how the Consultants analyzed the problem, to test the Consultants' level of knowledge about the issues in the case, and to determine the Consultants' reliability. This requires Customers to be almost as familiar with the case ahead of time as the Consultants are. During the presentation, the Customers are expected to interrupt the Consultants with questions and to treat the Consultants like equals rather than superiors. This is often a new experience for students, whose primary experience in asking questions in formal settings is typically limited to asking questions of a much older and more experienced instructor who has a large power advantage over the student.

At the end of the presentation, Customers are asked to give a thumbs-up or thumbs-down on whether they would approve the recommendation that the Consultant presented. After every Customer gives their thumbs-up or thumbs-down, the instructor asks each one individually to explain their position. If the instructor knows the students well, it is best to put the most confident and brightest students last to make it less likely that they will merely repeat the earlier students' reasoning.

This method is different from having each case be presented by a student Presenter and a student Discussant, similar to a discussant at an academic conference. This method is also different from having each case be answered by student Analysts in a written report, whose answers are reviewed and given a written response from student Managers, similar to a referee at an academic journal. Rather, Customers serve a similar role as the audience at a finance professor's job market presentation. A key innovation that separates this method from others is that student Customers engage in back-and-forth questioning of the Consultants and are required to make on-the-spot judgements. The feedback is immediate, and the onus is on both sides to ensure that the analysis is fully explained.

After trial and error, I have found that grading Customers individually helps to reduce the free-rider problem that sometimes crops up in student groups (Stretcher, 2009). Teamwork is important to the success of Consultants, but not of Customers.

No extra materials are required for this method. The only additional requirement over most other case study methods is 20-30 minutes of class time once during the semester to explain how to be a good customer, and an extra 5 minutes after each presentation to discuss what the class can learn from the performance of the Customers.

GUIDANCE FOR STUDENTS ON HOW TO ASK QUESTIONS

The following are eight pieces of advice that I give students about being good Questioners. Another reference that gives advice on guiding principles to asking better questions is Baker and Gilkey (2020).

- 1) Ask clear questions.

Customers need to think about the phrasing of their question before speaking. I tell students to, "ask exactly what you mean."

- 2) Ask simple questions.

This is closely related to #1. When presenting # 1 and #2 to students, I phrase them as "Ask *clear*, simple questions," and "Ask clear, *simple* questions," to emphasize the interrelatedness between the two concepts. Short, simple questions are better than complicated or multistep questions. If Customers have a multistep question, they should break it into smaller parts and ask the questions one at a time. If a Customer has a multistep question around one topic, breaking them into smaller questions can be a useful way to begin to follow the next piece of advice:

- 3) Try to engage the presenters in a dialogue using a *series* of questions.

As discussed earlier, student surveys indicate that students are hesitant to ask follow-up questions out of a fear of being perceived as rude. I point out that a series of good questions will considerably improve a presentation by giving the presenter the opportunity to correct the most prominent errors or omissions from the presentation. Whenever I see a presentation that is made better by a series of questions, I make a point of mentioning to the class afterward: "Do you see how much stronger this presentation was because of that conversation?" However, it is important to remember that the Customer's only role in the dialogue is to ask questions, which leads to the next piece of advice:

- 4) Do not hijack the presentation.

The goal of the Customer should be to learn the Consultant's solution, not to waste everyone's time with the Customer's own theories. I like to point out that real-life Customers spend a lot of money to hear the Consultant's solution. Baker and Gilkey (2020) refer to this as avoiding "questions that are statements in disguise."

- 5) If your question is not answered to your satisfaction, ask it again.

- 5a) If the question still is not answered, say, "Let me rephrase the question..."

- 5b) Do this as many times as necessary until your concern is addressed.

It is extremely common for presenters to misunderstand a question, or to answer a completely different question than the one that is intended. This is completely natural; a presenter has thought about the problem by arranging the facts in multiple different orders before deciding on one for the presentation, and these different logical orders often interrelate in their mind. The audience, who is hearing it for the first time, is only hearing one way of arranging the facts and as a result may be led on a completely different line of thought. Thus, an audience member's question can mean one thing, but be interpreted by the presenter to mean something completely different. In my opinion, it is extremely helpful to the presentation to address these types of concerns immediately. However, I have encountered extreme reluctance among students to persist in a line of questions where the presenter has fundamentally misunderstood the question being raised. Thus, Customers need to be rewarded for their persistence.

- 6) Try to get the presenter to answer, "I don't know."

This step is partially a follow-up of the previous bit of advice: sometimes, a presenter will purposefully answer a different question than the one that is asked as a way to deflect the fact that they do not know the answer to the original question that was asked. If this is the case, then the presenter is being deceptive or ignorant. It is crucially important for Customers to determine the difference between deception/ignorance and a simple misunderstanding. I remind students that part of the responsibility of the Customer is to determine if the Consultants' solution can be relied upon. A person is unreliable if they will not admit when they do not know an answer.

- 7) Always prepare a question that you think the presenter is not ready for.

This tests not only the presenters' knowledge and preparation, but also their honesty. This is because it is extremely rare for a presenter to know absolutely everything about a case. It is wise for students to prepare multiple questions like this in case the presenters answer the prepared question during their presentation.

- 8) Do not be afraid to interrupt.

Interrupting early in the presentation accomplishes three goals. First, it can greatly aid the presentation to clear up misunderstandings early in the presentation. Second, it tests the presenters' ability to think on their feet. This can be desirable in some situations that students will face in the future, such as when they are conducting a job interview. Third, interruptions can get a presenter out of their practiced rhythm. This is desirable because most people have the ability to sound halfway decent in a prepared speech even if they are unfamiliar with the topic. The Customers' job is to test how much the Consultant actually knows about the topic; thus, this requires getting the Consultants out of their prepared speech.

In addition, I like to point out that a good series of questions is like a good media interview. A good questioner allows the presenter the opportunity to address the most glaring weaknesses in their presentation, aiding the presenter's ability to make their point and consequently making the presenter look considerably better to the audience. However, by asking questions about the weak spots, a good questioner can also reveal a charlatan. A charlatan does not have good answers about weak spots, and looks far worse under questioning than when speaking uninterrupted. To drive this point home, I like to show my students videos of politicians giving a prepared speech. Then I show them the same politicians being embarrassed by simple questions from interviewers.

Thus, students also learn that asking tough questions exposes presenters who do not know the material. Therefore, as a secondary learning objective, they learn how to evaluate the abilities and trustworthiness of presenters. This is an essential job skill for anyone who has a position of responsibility. Is your supplier, coworker, job candidate, consultant, or potential partner genuinely reliable and knowledgeable?

POST-PRESENTATION CRITIQUES OF STUDENT PERFORMANCE

I spend five minutes after each case giving feedback to the entire class about the Customers' performance. In this section, I will first describe specific pieces of advice on the type of feedback that may benefit students for this method. Second, because this is a topic that is so rarely discussed, I will give advice on how to critique student performance in general.

The lack of previous formal education in How to Ask Questions means that most pieces of feedback will be completely new for students, especially early in the semester. A brief post-presentation performance review in front of the class allows the entire class to learn from each Customer. By critiquing everyone, the focus is kept on methodology rather than individual students' failures.

The first part of the feedback happens after the Customers have presented their reasons for giving thumbs-up or thumbs-down. I have adopted the strategy of assigning other students to do initial critiques. I cold-call several students to critique the Customers and the Consultants. Their role is to give constructive criticism only; they are told to suggest areas for improvement and to not give positive feedback. This has three advantages: First, it increases the number of students who must pay attention to the presentation, increasing student engagement in the case even further. Second, it decreases the amount of negative feedback coming from the instructor, making the instructor appear more likable to students. Third, it shows students that the areas that require improvement are obvious to everyone, thus reinforcing the lesson to students who may otherwise be skeptical of the instructor's opinions.

It is important the critiques are not merely complaints about the presentation. There is a difference between a critique and a criticism. A critique focuses on making the presenter better. I tell students that the point of the critique is similar to the point of listing weaknesses in annual performance review. Thus, in doing the critiques, students are getting practice at another important managerial skill: giving negative feedback in a positive manner, with the goal of improving an area of weakness. The temptation might be to call this something other than a critique to avoid the association with complaints; however, I have found that many students are too timid to provide useful feedback if it is just called "feedback."

After the (optional) Critiques from audience members, the instructor should give feedback about the Customers' performance. I focus on critiquing style first. This has the advantage of setting a clear boundary between the end of the case presentation and the beginning of the lesson on what we can learn about communication skills.

Most students instinctively tend to agree with the presenters. I have never had a Customer give a thumbs-down during the first presentation of the semester. There are several possible reasons for this: the extra effort required to think critically, 12+ years of lecture-based education, or a desire to appear agreeable to their classmates could be inducing this instinct. For this reason, it is important for the instructor to challenge agreeable Customers to defend their position. Sometimes, their primary reason for agreeing is that the Consultant's solution agreed with the Customer's preconceived solution. Students should be informed that this is not a sufficient reason to agree. Sometimes, the Customer parrots a talking point from the Consultant. The Customer should be challenged on this talking point - what are potential counterpoints to the Consultants' talking point?

Similarly, it is also important for the instructor to praise Customers who disagree with the Consultant. However, the instructor should also ask why the customer disagreed. Sometimes, the Customer states an invalid reason. For example, the Customer may give a reason that was not addressed in the presentation. This is unacceptable because one duty of the Customer is to give the Consultant the opportunity to answer such objections. This can be a tricky situation: frequently the first Customer in the semester who objects to the Consultants will have an invalid reason for objecting. The instructor must balance praise (for independent thought and daring to be disagreeable) with criticism (for picking an invalid reason to reject the proposed solution).

Many instructors are reluctant to critique students in front of other students in the classroom. This is a good instinct; the power difference between instructors and students (particularly at the undergraduate level) means that the instructor's words can have a deep impact on some students. Criticism that is poorly delivered is often worse than not saying anything, and caution can lead to us being more thoughtful. However, criticism is very helpful for learning new topics. Students learn a lot from thoughtful critiques of other students' work.

I offer three general pieces of advice for critiquing students. First, be very specific in your criticism. This shifts the focus from criticizing the "student" to criticizing a specific action or opinion. Second, balance criticism with praise. Genuine praise cushions the negative impact of the criticism. Additionally, just as students learn from criticism of other students, they also learn from praise of other students. Third, rather than always choosing between criticism or praise, instructors can choose to take a third path: asking questions. Ask them to defend their opinions. If they did something you thought was wrong, give the student a chance to explain themselves. Ask follow-up questions, particularly if their initial answers are good. If their answer indicates a lack of understanding, ask what an alternative way of handling the situation may have been. Get them to think outside the box. If necessary, allow them time to think about their answer. If the student's answer is faulty or the student appears to be uncomfortable, ask if anyone else has a different answer to the question, or ask a classmate, "What would you do in that situation?" This is a variation of the time-tested Socratic Method which works so well in law and philosophy courses. Under the Socratic Method, the instructor asks increasingly in-depth questions that probe students' assumptions about the nature of the subject they are investigating. The instructor does not provide answers; rather, the instructor asks students follow-up questions that relate to previous answers given by the student. This paper is not meant to introduce the Socratic Method, as that is an ancient technique for which there is already a wide variety of information available. Rather, the final point of this paper is that use of the Socratic Method can be useful in helping students understand both case studies (a perspective is also encouraged by Trifts and Kohl, 2020) and how to improve their own performance.

However, the primary problem encountered when using the Socratic method is not due to difficulties in converting the method to a business setting. That part comes rather easily. Rather, the primary problem is that most instructors have little experience at it. Figuring out the proper questions to ask at the proper time requires practice. After all, one of the drawbacks of a lack of focus on the study of asking questions is that many business instructors are still learning this skill, too.

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