

Training of Trainers
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Lecture 22
Training Methods – (Case Study - I)

In earlier models I have discussed about different methods and one of the methods was the case studies, so we will first understand what is case study then how to make the case analysis and in this case analysis I have taken one case as an example and the framework we go according to this case analysis guidelines, so in subsequent sessions also this case we will continue and we will complete this case analysis.

Now, case studies are given a very-very high importance in the management teaching, the reason is that is case studies are giving a simulation effect in the classroom, it talks about a particular problem which was faced in an organization and how the organization has solved that particular problem. Now, cases can be open-ended and cases can be close ended, when we talk about case that are open-ended so case will end without questions and when we say the cases are with close ended then the cases will be closed with questions.


And it is not necessary that is all cases will be open-ended or all cases will be close ended. Sometimes the cases are just talking about a successful event or a failure event and they talk about all the sequences and activities what has been done right from the beginning and then how organization come across that particular situation and then finally concluding of the case study is there. Students are taught these cases to understand first that what is the situation.


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Case Studies

- **A case study is a description about how employees or an organization dealt with a difficult situation.** Trainees are required to analyse and critique the actions taken, indicating the appropriate actions and suggesting what might have been done differently.

- Cases may be especially appropriate **for developing higher order intellectual skills such as analysis, synthesis, and evaluation.** These skills are often required by managers, physicians, and other professional employees.

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2

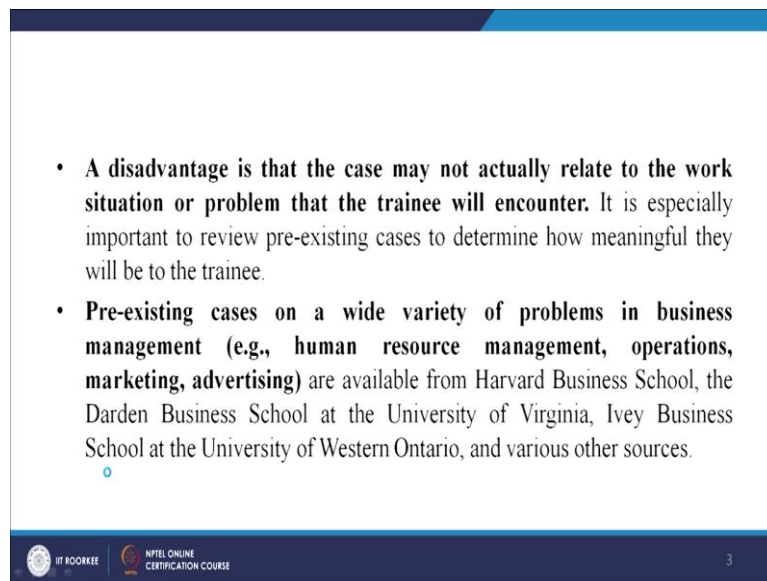
A case study is a description about how employees for an organization dealt with a difficult situation. Normally most of the cases are talking about a difficult situation may be about sustainability, maybe about growth, maybe about the particular decision which has created a critical situation, so that is about the case study. Trainees are required to analyse and critique the action taken, now as I mention they may be open-ended cases, open-ended cases will talk about just the difficult situation and what management has taken the decision.

Now, the trainee is supposed to take a view on this particular case, while making the analysis of the case they can be having the any critique the action taken by the management because they may find that this decision was not correct and they can indicate the appropriate action, that is no this action or this decision was not correct, they were supposed to take another decision or another action which the trainee himself propose and suggesting what might have been done differently and then he may suggest a different way but this is not always necessary, sometimes that is the evaluated decision and while analysing that particular decision they make come with a conclusion that was no, in a given situation that decision was the appropriate decision.

Cases may be especially appropriate for developing higher order intellectual skills such as analysis, synthesis and evaluation. Earlier, I have mention about the IQ - Intelligent Quotient, so therefore in the case analysis when the problem is given this is assume that is they will be able to do the analysis with whatever the input has been given in the form of case study they will do the analysis, they will synthesise and they will make the evaluation of that particular case study.

These skills are often required by managers, physicians and other professional employees are there, those who ever are the decision-making position so this is applicable to all if you are referring the case studies from the business industries then definitely these types of case studies that will be applicable to the managers and the learners from the management education and if the case study is from the medical science then it will be helpful to the doctors that is how in that a particle case is been handled and success is there and similarly if we are talking about any engineering case study then the case study will be on the engineering context and then that decision will be taken.

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- A disadvantage is that the case may not actually relate to the work situation or problem that the trainee will encounter. It is especially important to review pre-existing cases to determine how meaningful they will be to the trainee.
- Pre-existing cases on a wide variety of problems in business management (e.g., human resource management, operations, marketing, advertising) are available from Harvard Business School, the Darden Business School at the University of Virginia, Ivey Business School at the University of Western Ontario, and various other sources.

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But every method is having certain advantages and disadvantages, the disadvantage is that the case may not actually relate to the work situation or problem that the trainee will encounter. So if any particular case study is discussed and a particular situation is discussed then that situation it is possible that the trainee in his whole life may not come across that type of situation. I would like to take example of the stage of the organization, a nature of the industry, so if the cases on the nature of auto mobile industry, aviation industry and employees working into the service industry, service industry means like the IT industries then definitely the parameters, the factors that will be different.

So if those are the different parameters and factors then in that case that particular trainee may not find it much your role, so that is a disadvantage is there but we can overcome this particular problem, we can overcome this particular problem with the help of that is generalising the problem and in a given problem normally what factors are taken into consideration and then what decisions I have been taken.

I would like to give example like if in a particular case study may be related to the manufacturing industry but the problem may be about the absenteeism of employees then how organization handles the absenteeism behaviour problem, so behaviour problems will be applicable in the manufacturing industries also and in the service industries also.

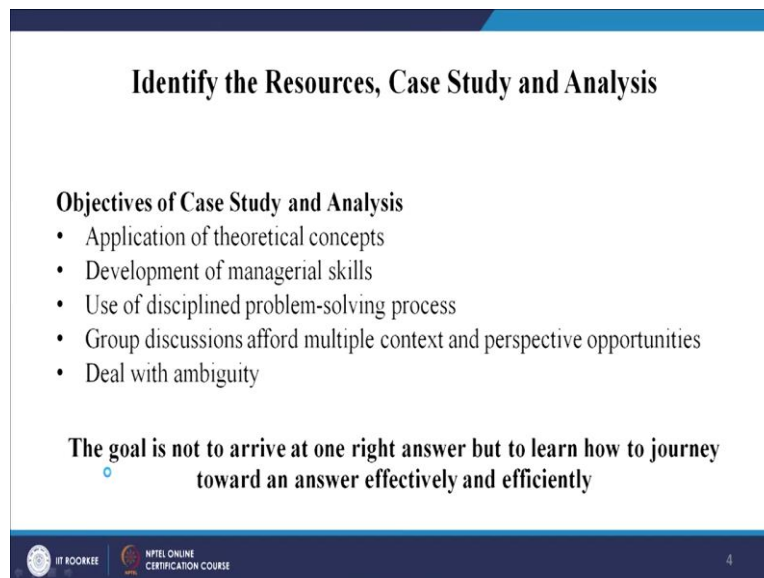
So then that will be helpful to the reader that is the trainee. It is especially important to review pre-existing cases normally of our area to determining how meaningful they will be to the trainee, so therefore whenever we are conducting the training program as I mentioned in

earlier models also we should know the profile of the trainee that is what is their educational background and social background and technical background and then on the basis of that then we have to determining that which cases are the right cases, so we have to review pre-existing cases to determine how meaningful they will be to the trainee.

Pre-existing cases on a wide variety of problems in business management example human resource management is very common, operations management, marketing and advertising are there, so therefore already there are number of varieties of case studies problems in the business management and those case studies are available from the different sources like Harvard Business School cases they are very popular, the Darden business School at the University of Virginia they are also having a good case bank.

Then Ivey business School in the University of Western Ontario and various other sources are there and there will find the number of case studies are there. Earlier this databases were not having the Indian case studies but now these databases are having some of the Indian case studies also, so if we want to study the cases in context to the Indian culture, so we can focus on those cases and can get the cases from this particular source. So when the case study is given to the trainee now the question arises how to make the analysis of the cases.

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Identify the Resources, Case Study and Analysis

Objectives of Case Study and Analysis

- Application of theoretical concepts
- Development of managerial skills
- Use of disciplined problem-solving process
- Group discussions afford multiple context and perspective opportunities
- Deal with ambiguity

The goal is not to arrive at one right answer but to learn how to journey toward an answer effectively and efficiently

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4

The objective of case study and analysis is application of theoretical concepts. First we have to understand the theory behind a particular case, if the theory behind the case is related to the managerial functions like planning, organising, leading, directing and controlling then definitely in that case that application of theoretical concepts that will be applicable or it may

be related to the behavioural science concepts like the leadership, motivation, change management, stress management, conflict management, emotional intelligence, teambuilding, organization culture, organizational power in politics and so many, so therefore in that case the objectives of the case study analysis will be based on the what theoretical framework we are going into discuss in the particular case study.

Now, what is the second objectives? Second objective is while going through the case study, while understanding the resources, while understanding the problem, while providing the solution what the trainee does? Trainee develops a managerial skills. As we know a trainee is required to develop all the managerial skills and those skills, job knowledge skills, HR skills by understanding and analysing the case study he is assisted getting guidance that is how in a given situation what decisions are to be taken and he can develop and enhance his interpersonal skills and the job knowledge skills.

Third objective of the use of the case study is use of discipline problem solving process and therefore in this particular example you will find that is the yes all cases are related to the particular nature of industry or particular nature of discipline and therefore the trainer will help the trainee to make the use of the discipline problem-solving process which has been suggested in the analysis of the case study. Next is a group discussion afford multiple context and perspective opportunities.

Now, there will be a group of the trainee normal the standard size may be 25 and when the case is given everyone will come out with different ideas, different points, different solutions so that there will be group discussion because the trainees will also discuss one will come, he will present the case study another will take these notes and then he will discuss on basis of the discussion, so there will be a very strong strengthen good case discussion will be there.

These group discussions on the case that will give different aspects, multiple context will be there, somebody will look in the context of the interpersonal relationship, somebody will look in the context of the teambuilding, somebody will look in the context of the motivation and therefore it will be giving a different contexts and there will be the, because there are so many dimensions, so it will give the opportunity also, opportunities to solve the problem and because the number of persons are dealing with that particular case, so there might be the ambiguity but when it will be discussed when the group will be able to deal it with that antiquity and that ambiguity will be removed.

So the goal is not to arrive at one right answer but to learn how to journey towards an answer effectively and efficiently. This is very-very important point, no case study has a clear cut right or wrong answer, so therefore whatever answer is there but the person learns how to journey towards an answer effectively and efficiently, so what solution is to be there, what answer is to be provided that will be discussed whenever there is a group discussion and finally they will reach that is the what is the efficient and effective answer.

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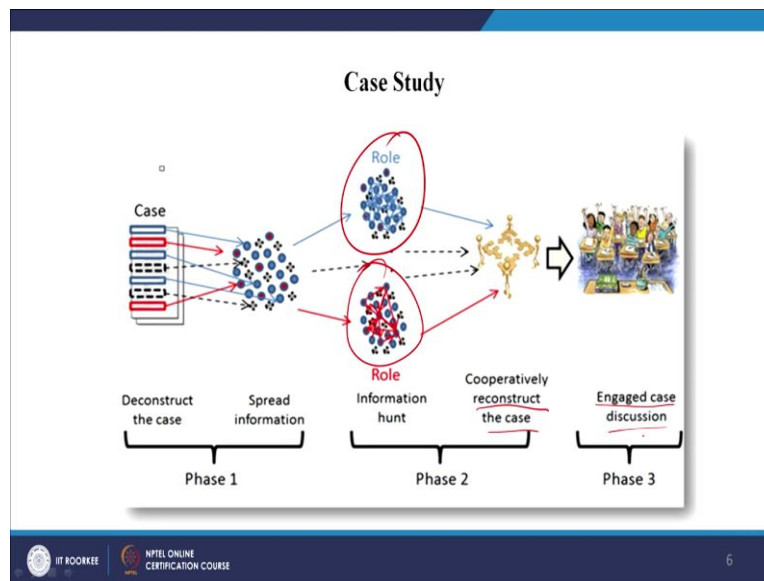
Process for Case Development

- Identify a story.
- Gather information.
- Prepare a story outline.
- Decide on administrative issues.
- Prepare case materials.

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Process for case development is there, case writing however I will be discussing case writing in the further session also but here identifying a story, gather the information, prepare a story outline that is what it talks about, decide on administrative issues, so what are the topics are there that we will be able to identify and preparing case materials for this particular case development and on basis of this case material which has been developed because this will be taken in the class discuss and finally the common solution will be find out.

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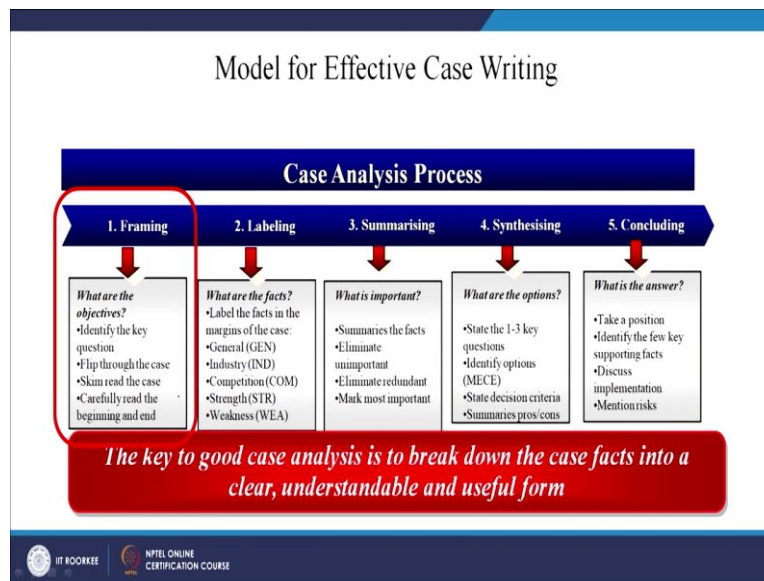


So there are 3 faces in case study phase 1 that is the deconstruct the case, so because the case may not be related to your culture, may not be related to your country, may not be related to your aspect in which you are looking for and therefore that case that has to be deconstruct and segregated into the different pockets and then we have to understand that is which pocket is becoming more relevant to the trainer and trainee.

Then whatever other irrelevant pocket has been identified that is yes this issue we can discuss in this particular case then that will making the spread the information, information will be spread in phase 1, so that there can be different role, so roles can be identified, the role can be that is the information hunt will be there, so therefore the group discussion will be there and in the group discussion because of the different role they will be discussing about different aspects.

Then cooperatively reconstruct the case, here this particular reconstruction of the case starts when a person understand the roles and different roles will be there and these roles and these integration of these particular roles that will lead information hunt that will lead to the reconstruct the case and therefore, the trainee will identify that is what is relevant for him in this particular case that information he will collect and when he will get that particular gathering of information then he will engage the case discussion that will be the phase 3 will be there, so in the phase 1 like whatever the case is there that will be deconstruct, information will be spread, the relevant roles will be identified, so re-structure reconstruct the case and on the basis of the relevant information of the case that the case discussion will be start in the group.

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In the case of the case analysis process, in the case analysis process here we will find there is a framing, labelling, summarising, synthesising and concluding there are the 5 steps are there, so therefore there is a framing, labelling, summarising, synthesising and concluding. Whenever we are talking about framing what are the objectives of the framing? First step, that case is distributed, we have to ask to the participant and trainees to read the case they will read the case for the first time then they will read the case another second time and therefore after second reading of the case they should be able to identify the key question given in the case that what is the key question is there and the question will be, that we will go through the example also but that will be the heart or soul of that particular case study.

So by flip through the case going through the case the key question is identified, so to flip of the filming of the case, the person will try to find out the answers to those questions then the skim read the case, that is very short way and in skimming way they will start that is the, they will skim and then find out that what is the most important input for the particular problem the question which is to be discussed the problem which is mentioned in the case and therefore while skimming the case the important points that will be discussed.

Then carefully read the beginning and end and the trainer will be advised that is the he has to go through the careful reading the beginning and the end, the purpose of reading the case study in the beginning and the ending of the case is that it will give us the idea whether the problem is been solved or not solved and what are the consequences of the decisions taken by the industry.

Number 2 labelling, what are the facts? Label the facts in the margin of the case that we will discuss in another session also, training session and that is general industry competition strength and weaknesses and 3 will be summarising key analysis, so framing, labelling and summarising, summarising is summarising the facts, eliminate unimportant, eliminate redundant and make the most important is there that is summarising, filtering will be there and summarising will be there, whatever has been summarised they will be synthesis from the state 1 to 3 key the questions, whatever on the basis of these 3 steps, what are the key questions are there identify the options what solutions can be there for this particular problem.

State decision criteria, whatever decision criteria is there and the summarise the pros and cons and therefore in that case in summary after synthesising and summarising that is what are the strengths and weaknesses or positivity or negativity of this particular case study. Then including of the case study, in the concluding of the case study what is the answer?

Take a position that is the yes if this is the problem then and this is the question and then take your position and identify the few key supporting facts on the basis of the case study that these are the issues and therefore, I have taken this particular decision. Discuss implementation, how will you implement that decision and then mentioned the risk, that is the what is the risk is there in implication of that particular decision. Here the more detailing of this particular steps are there and the appropriate tips are given.

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<p style="text-align: center;">Phase I – Framing Key Question: What are the objectives?</p>	
STEPS	TIPS
Identify the key question (what is the assignment, discussion questions, and purpose of this case study)	<ul style="list-style-type: none"> • Pay attention to what the Professor says as the case is introduced • Understand the context of the case in terms of material from the textbook
Flip through the case (in less than 5 minutes, look at the big picture of the case and the overall components)	<ul style="list-style-type: none"> • This is literally intended to give you a look at the overall contents of the case • Conclude as to the general nature of the case – quantitative/qualitative, technical/general, long/short, etc.
Skim read the case (in less than 15 minutes read the intro and end of each paragraph and skim all exhibits)	<ul style="list-style-type: none"> • Don't bother marking up the case at this point • Focus on getting the 'gist' of the paragraphs without reading every word (find the 1-2 primary sentences and understand how other sentences support them)
Carefully read the beginning and end (every case has an important intro section and ending section)	<ul style="list-style-type: none"> • Some of the most important information about the framing of the case comes in the beginning and end • Realize that every story has a situation, complication and resolution (try to find the key issues to solve)



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Identify the key question, what is the assignment? Discussion questions and purpose of this particular case study? This we have to identify the key questions and the tips will be pay attention to what the Professor says as the case is introduced. Understand the context of the case in terms of materials from the textbook.

Now, here you see this case will be demonstrated by the trainer or the particular professor and therefore the trainees are the students they are supposed to know that is what type of the tip has been given by the faculty and whether there are proper introduction of the case and that case is there or not and understand the context of the case in terms of material from the textbook, so we have to integrate theoretical knowledge with the case study.

Flip through the case, in less than 5 minutes look at the big picture of the case and the overall components. When we are going through the first readings, second reading this is literally intended to give you a look at the overall content of this case, so overall content of this case will be that is whatever the input is given there that has to be discussed. Conclude, as to the general nature of the case quantitative or qualitative, what type of case is there? Normally the case can be in the finance and may be titled as nature.

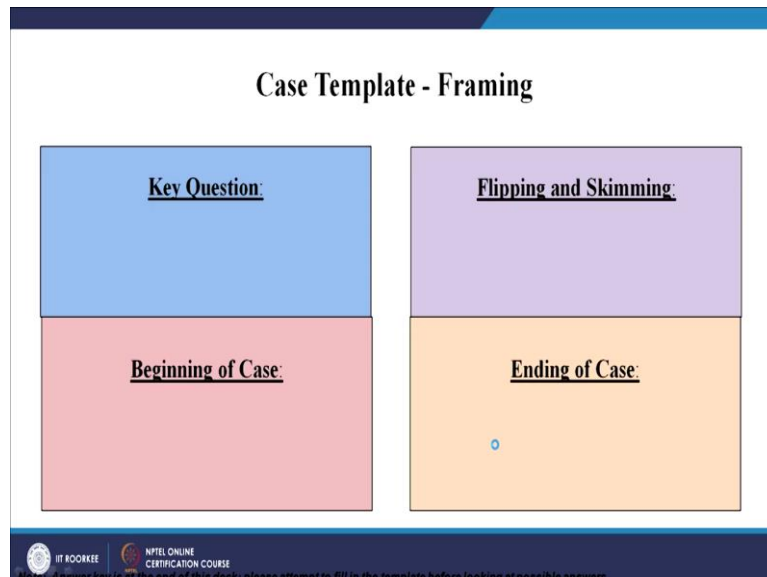
Conclude as to the general nature of the case that is quantitative versus qualitative, technical versus general, long versus short and therefore the classification of the case study will be done. Skim read the case, in less than 15 minutes read the introduction and end of each paragraph and scheme all exhibits, how to do that? Tips are do not bother marking up the case at this point and keep on marking all the points, focus on getting the gist of the paragraph, what the paragraph has to say?

Without reading every word that is need not to go by every word with the first, find first and secondary, primary sentences and understand how other sentences support them and therefore the gist of the case will give us a direction that is which is more supportive and which is less supportive. Carefully did the beginning and end and every case has an important introduction section and the ending section, now here that is some of the most important information about the framing of the case comes in the beginning and end, so very important information that can be either in the beginning or it can be in the end.

Realize that every story has a situation, complication and resolution, so therefore the case study that will definitely have a situation which will be complicated because there has to be complication and resolution that is how this particular case can be resolved, situation can be

handled, so therefore when we talk about key questions there are the 4 objectives identify the key question, flip through the case, skim read the case and carefully read the beginning and end of the case, the tips are given that is how these 4 steps are to be followed. So the trainees are asked to create that 4 templates that is called the framing.

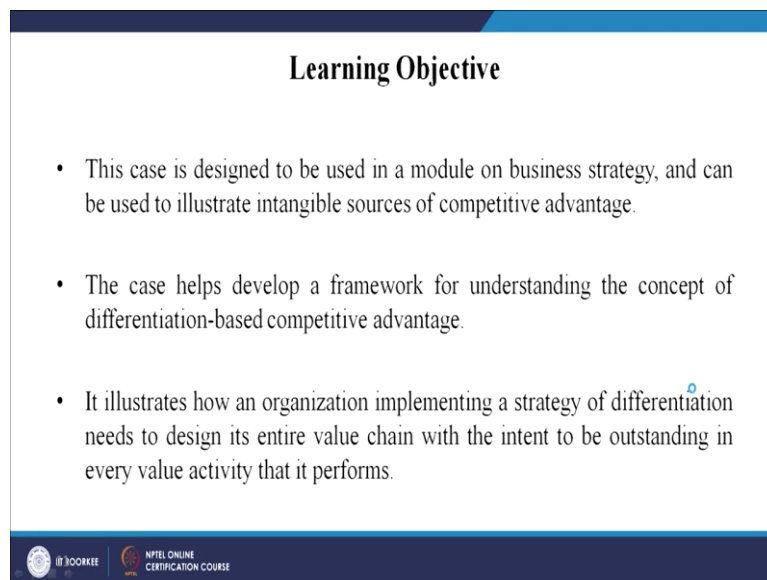
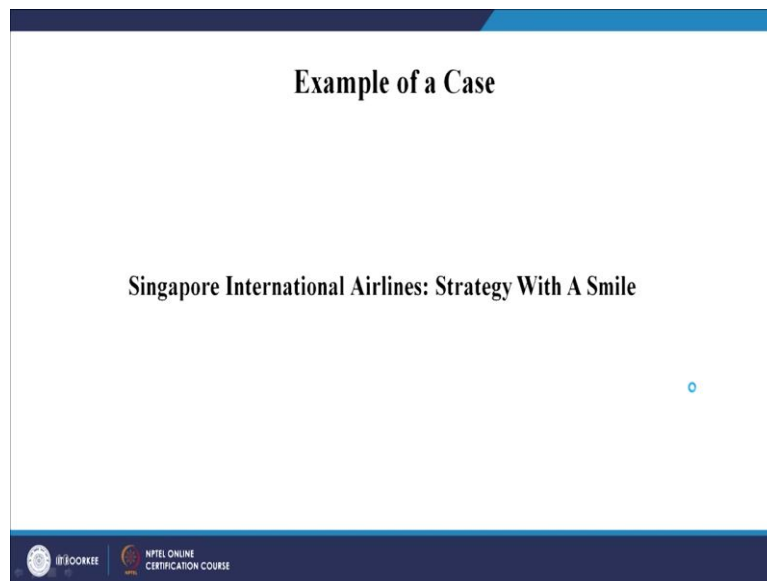
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For the framing there will be 4 templates, these templates will be key questions and then we will go through the example that is what are the key questions 1, 2 and 3 at least that is the 3 important questions are there. Flipping and skimming of the case, going again and again, again and again and then we will find that is the we have reached to the flipping and skimming of the case that what exactly the case is there, gist we will be able to get. Beginning of the case and then we have to start with the beginning of the case and then the ending of the case that is how the ending of the case will be done.

Now, we have to be very careful that is the beginning of the case and ending of the case that should not be hypothetical and that should be based on the facts provided in the case. Now, I would like to take an example of a case and this example will continue with this particular theoretical points which I have mentioned and not only in this session but second session also this particular framing of the case study that will continue and it will be reflected into the, as an example in the study material.

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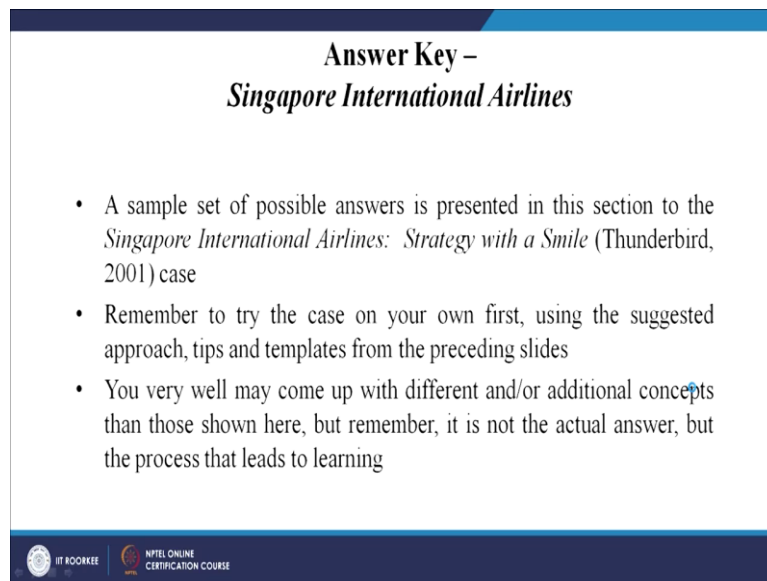


The title of the case is Singapore International Airline: Strategy with a smile. What are the learning objectives? This case is designed to be used in a module on business strategy and can be used to illustrate intangible sources of competitive advantage. This case helps develop a framework for understanding the concept of differentiation based competitive advantage. So, this case helps develop a framework for the differentiation based competitive advantage. What are the different points are there and what is the competitive advantage is there in the case study that will be discussed decided.

It illustrates how an organization implementing a strategy of differentiation needs to design its entire value chain with the intent to be outstanding in every value activity that it performs. So, therefore it illustrates that is the how an organization can implement a strategy of

differentiation that is need to be designed and its entire value chain with the intent that is the if these are the points, these are the strategy of differentiation, earlier it was mentioned that is you have to identify the differentiation and then you have to design the understanding in every value activity that it performs and only in that case they will be able to go for this particular learning objective.

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Answer Key –
Singapore International Airlines

- A sample set of possible answers is presented in this section to the *Singapore International Airlines: Strategy with a Smile* (Thunderbird, 2001) case
- Remember to try the case on your own first, using the suggested approach, tips and templates from the preceding slides
- You very well may come up with different and/or additional concepts than those shown here, but remember, it is not the actual answer, but the process that leads to learning

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Now, we will go with this example a sample set of possible answers is presented in this section to the Singapore International Airlines: Strategy with a smile that is Thunderbird 2001 case. Remember to try the case on your own first that is what the case is using the suggested approach, tips and templates from the preceding slides. So from the preceding slides we are getting those particular templates and while going through the case study we have to fill those templates and therefore that way we will be able to do the case analysis.

You very well may come up with different and or additional concepts then those shown here right. So therefore every individual is having his own competency and his own way to look towards the case so it is not necessary that every trainee will have the common objective or every trainee will be having a common competency to analyse the case and there will not be necessarily a common format for this writing inside the templates that is this this are the different strategies, no. Every individual can come out with different suggestions but remember it is not the actual answer but the process that leads to the learning, so but while doing this the person they are able to learn.

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Case Example – Framing <i>Singapore International Airlines</i>	
Key Question How can SIA best position itself for the future? <ul style="list-style-type: none">• Should SIA invest in Virgin Atlantic?• Should SIA pursue a low-cost strategy?• Should SIA stay in the Star Alliance?	Flipping and Skimming What is most notable during the flip & skim? <ul style="list-style-type: none">• 16 page case with 10 exhibits and a glossary• Lots of data provided – not all will be relevant• The organization of the case is: (i) introduction; (ii) industry; (iii) markets – NA, Europe, Asia; (iv) alliances; (v) Singapore – country and company; (vi) issues moving forward
Beginning of Case What is going on and what is the problem? <ul style="list-style-type: none">• The timetable is the beginning of the 21st Century (1999)• A major strategic issue is the possible investment in VA• Other strategic issues include: (i) increasing competition; (ii) labour costs are rising; (iii) customers are moving toward lower fares; (iv) alliances	Ending of Case What other insights may impact our decision? <ul style="list-style-type: none">• An important fact is that even though the airline industry is increasingly global, there are very few true global players• The alliance decision is critically important• SIA leaders seem to be in support of the VA investment

So, finally I will come that is on the basis of this first part that is about framing that is how Singapore – Airline's framing is to be done, the template was shown that is the key question, then the flipping and skimming, then beginning of the case and ending of the case. Now the key question, how can Singapore International Airlines best position itself for the future? Now, this question is not only for Singapore International Airlines, the trainees should be told that is this type of questions can be applicable to their own industry and with the help of this particular case study they can design and develop the best position for the future.

Should Singapore International Airline invest in Virgin Atlantic? Should it perceive low-cost strategy? Or should Singapore International Airlines stay in the Star Alliance? And why? Then flipping and skimming will be 16 pages case with 10 exhibits and the glossary is there, what notable the flip and skim is there that this case is of the 16 pages with 10 exhibits and glossary. Lots of data provided not all will be relevant. The organization of the case is introduction, industry, markets NA, Europe, Asia, alliances, Singapore country and company and issues moving forward.

We have to focus on the beginning of the case, what is going on and what is the problem? The timetable is the beginning of the 21st-century that is 1999 so therefore that time that what was the global economy scenario. A major strategic issue is a possible investment in Virgin Atlantic, other strategic issues includes increasing competition, so some trainees they may come out the issue is related to the increasing competitions. Some trainees those who are having the HR background basically they will come out with the labour's cost arising third

one may come with the marketing that is customers are moving towards lower fares and fourth is the alliances.

So, therefore in that case these particular 4 issues in the beginning of the case the readers may come out increasing competition, labor cost arising, customers are moving towards lower fares and the alliances are there. What will be the ending of the case that we have to discuss? What other insights may impact of a decision?

And important fact is that even though the airline industry is increasingly global there are very few true traditional players are there, so an important fact even though the airline industry is increasing global but always there is a tough competition and if there is a competition very few true global players will be there and if there are only few true global players then definitely the competition for the Singapore International Airlines that can be winning situation.

The alliances decision is critically important. Now you see as I mention earlier that is in the case study analysis it is a decision-making process, how do you take a decision? And therefore, it will be becoming very critical that is what decision one would like to take? So Singapore International Airlines leaders seem to be in support of the Virgin Atlantic investment and therefore in that case it will be very important that this whether the Singapore International Airlines go with the VA investments or they should not go with VA investments.

So, this particular framing, this will be the framing of the case study, whatever this study is given we have to find out the key questions, we have to find out that is the what is flipping and skimming of the case or the case is based on what parameters are there, those parameters are to be identified then we have to go through the beginning of the case that is again, again we have to go to the beginning of the case and find out what is going on and what is the problem and ending of the case that is what other insights may impact our decision, so therefore you may find that is the reason is may be the cause may be the customers or there maybe businesses deal and like this way the framing of the work will be done and the first part of the case analysis that is over, so thank you.