

European and Asian resistance to the use of the American case method in management training: possible cultural and systemic incongruencies

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Abstract

In this contribution to the use of the Harvard-style case-style method in the training of managers, a transfer problem is identified. This is manifested in the difficulties presented for many non-American students in the use of traditional case-studies. As a result, an example of a revised case method is proposed which offers more educational flexibility and better acceptability.

Problem statement

The use of case-studies has become traditional practice in many MBA schools around the world. Following the example of the Harvard case method, most American MBA teachers use the case method on a regular basis. American MBA students' final grade often depends on the students' ability to understand and respond to the case method. For instance, the average Harvard MBA has the opportunity to read and prepare between 500 and 700 business cases before graduating (Ronstadt, 1977).

Many universities and business schools around the globe have either copied the Harvard model or adopted part of its teaching methods for local use. This transfer of educational technology from the USA to all parts of the world has been made possible because many American MBA teachers have taught MBA courses in other countries and because a great number of non-American MBA teachers have taken post-graduate courses at American schools or even taught at American MBA schools.

Being part of the latter group, the authors have used the case Method in academic settings and in in-house training seminars in enterprises in the USA but also in Europe, Asia and Africa. The

authors obtained mixed results. While American students and managers in general responded well to the case method, many European and Asian course participants experienced difficulties with this teaching method and expressed their discomfort either by prolonged silence and passivity or by openly criticizing the case method.

The purpose of this paper is to shed light on this transfer problem and to identify some of the possible causes which contributed to the discomfort of many non-American students. Following the analysis, an example of revised case method is proposed which offers more pedagogical flexibility and guarantees better receptivity. The traditional case method has been a powerful teaching tool for American and non-American students. It can be made even more effective if it is de-linked from its American format and made more relevant to the requirements and needs of the non-American MBA student and business executive alike.

Working within context of cultural relativism

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A great majority of the cases used in MBA schools and management training centres in the USA and other countries around the world have been written by American authors. The contributions by US academics have been extensive and many schools have greatly benefited from their pioneering work.

Nevertheless, the perceived cultural gap between an American case situation and the local reality has prompted some MBA schools outside the USA to write their own cases in order to be closer to local business conditions (Tiglao, 1992).

While it is certainly useful to have cases at hand which have been written for the local business context, it is equally important to have an appropriate teaching methodology at one's disposal. Unstructured cases, for instance, coupled with a 'laid-back' catalyst-teacher role can lead students to experience discomfort and confusion.

Hofstede's observation that 'management techniques and training packages are almost exclusively developed in individualist countries, and that they are based on cultural assumptions which may not hold in collectivist cultures' (1991: 66) certainly rings true and fits with the authors' own teaching experiences, especially in regard to the traditional use of the case method.

Hofstede's four-dimensional model (1980) differentiates national cultures into four dimensions, namely Power Distance (PD), Uncertainty Avoidance (UA), Individualism/Collectivism (IND) and

Masculinity/Femininity (MAS). These four dimensions can help teachers and students alike to conceptualize cross-cultural difference.

While there are disagreements regarding the validity of certain country ratings (Chew, 1993), the general concepts derived from this work remain useful and instrumental for secondary theory building. Applying Hofstede's findings to management training and development, Hoppe (1990), for instance, highlights the cross-cultural conflicts which might exist between teacher and student if one takes into account the PD and UA dimensions.

Combining the two dimensions, several regional clusters emerge. The authors propose to focus on the following groupings: Cluster I 'Anglo-Saxon' (low UA/low PD); Cluster II 'Germanic' (medium UA/low PD); Cluster III 'Asian NIEs' (medium UA/high PD) and Cluster IV 'Central & Eastern European' (high UA/high PD). Other regional clusters are left out since they are not part of the data reported in this article.

Countries

Cluster I: Anglo-Saxon

The countries included in this cluster are the USA, Great Britain, Canada, New Zealand and Australia.

Cluster II: Germanic

Included are Switzerland, Germany and Austria.

Cluster III: Asian NIEs

Part of this cluster are the so-called Asian Newly Industrialized Economies (NIEs), namely Singapore, Hong Kong, South Korea and Taiwan who form a less homogeneous cluster than the previous two clusters. However, according to the findings of Chew (1993), Singapore's UA is 36.02 rather than 8.0 as indicated in Hofstede's original data and the PD is 58.5 rather than 74. Her findings suggest a closer grouping of the four countries than was suggested by Hofstede's original findings.

Cluster IV: Central & Eastern European (CEER)

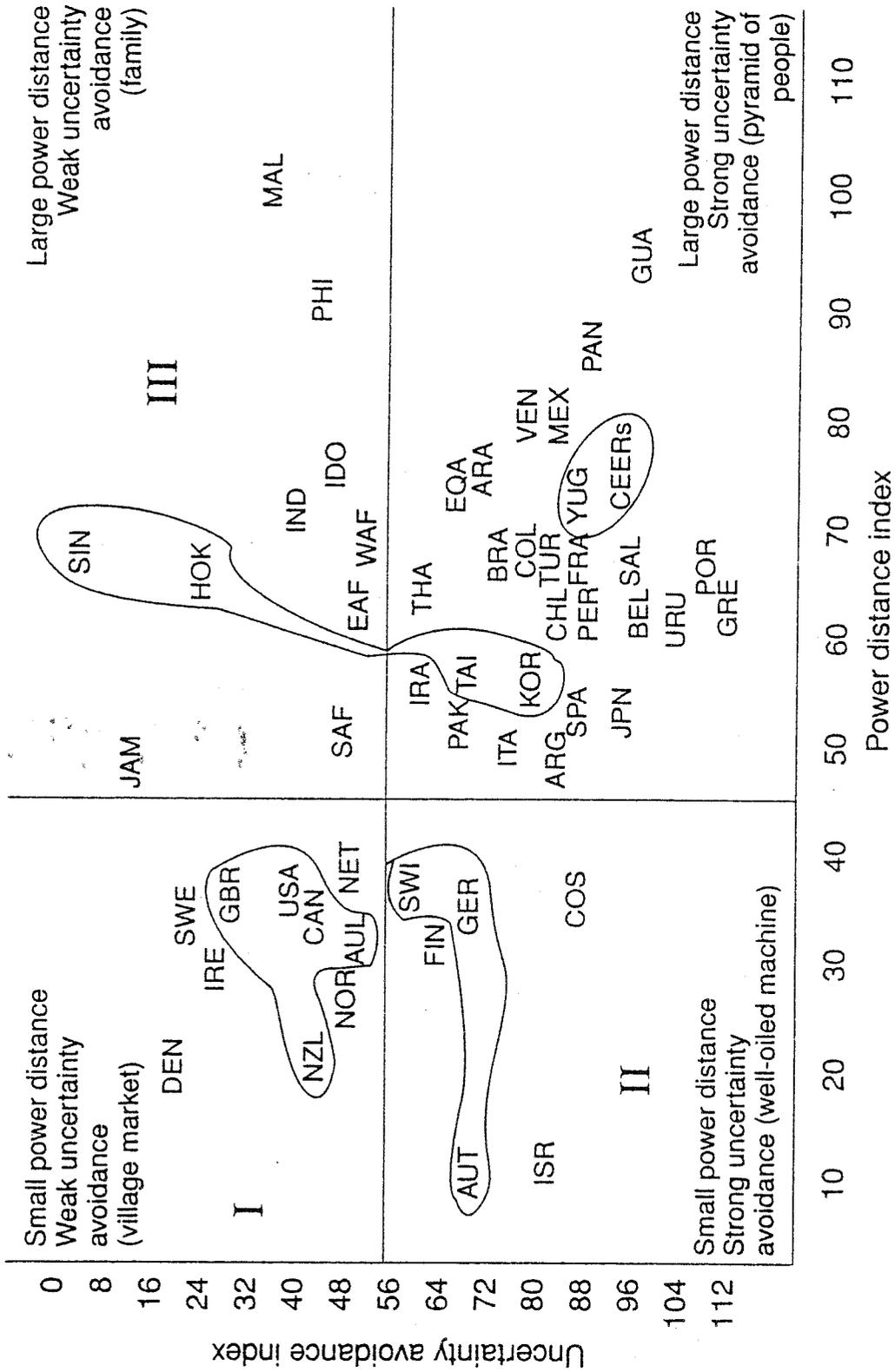
The only former communist country figuring in Hofstede's original data set was the former Yugoslavia. The other former communist countries were not part of Hofstede's original study, hence they do not appear on his chart. Nath (1988) has tried to predict the four

LARGE POWER DISTANCE	SMALL POWER DISTANCE
Instructor is seen as 'guru' who transfers personal wisdom to trainee and deserves competent respect	Instructor is seen as facilitator of learning who is respected if
Trainee expects instructor to initiate communication and guide instruction (instructor-centred)	Trainee expects to take initiative during and after instruction (trainee-centred)
Trainee refrains from publicly criticizing or contradicting the instructor	Trainee willing to level with the instructor
Older instructors are more respected than younger ones	Trainee considers age of instructor less important than his/her competence
Trainee prefers instructor to lecture	Trainee prefers instructor to provide a mix of experiential learning and lecture
STRONG UNCERTAINTY AVOIDANCE	WEAK UNCERTAINTY AVOIDANCE
Trainee prefers clearly structured learning situations, including precise objectives, and detailed and strict assignments	Trainee is comfortable in unstructured learning situations, including vague Objectives, broad assignments and open time tables
Trainee expects instructor to have definite answers to questions	Instructor may say 'I don't know' or 'I need to look it up'
Trainee and instructor experience learning as stressful and serious	Trainee and instructor experience learning as challenging and fun
Trainee is primarily interested in accurate problem solving	Trainee is comfortable with innovative approaches to problem solving
Instructor and trainee find the expression of strong emotions acceptable	Instructor and trainee try to keep own emotions in check

Source: adapted from Hofstede, 1980; Hoppe, 1990.

Figure 1 Participant expectations in training situations

dimensional ratings of the Central and Eastern European countries and has assigned them ratings varying between high-medium PD and high- low UA. Our experience of working as consultants and trainers with CEER participants leads us to believe that the former political and economic system has imprinted in the minds of the people a strong value orientation towards high PD and high UA.



Source: adapted from Hofstede, 1980.

Figure 2 Pyramids, machines, markets and families

Case method: a taxonomy

A case-study is normally a written description of an organization, Mostly of an enterprise, but it can also be used to describe a public institution or smaller organizational unit such as a department or division of a company. Different management experts have reported; on the case method (Christensen, 1987) and defined it in more details (e.g. Kosiol, 1969).

Reviewing the case methods, Ronstadt (1977), for instance, distinguishes the following types of case methods:

1 Highly structured or technical problem solving cases

This type of case method is generally short, and provides little or no additional information. The problem at hand is in general well-ordered and clearly stated. A 'best' solution often exists and students are expected to apply some pre-digested tools or models to derive the solution.

2 Short structural vignettes

This type of case is generally used in introductory management courses at the undergraduate level. Little excess information is presented. The case may vary in length from one to ten pages. A 'best' solution usually does not exist in the sense of a right answer.

3 Long unstructured cases or problem/opportunity identifying cases

The unstructured cases may vary in length from ten to fifty pages. Additional information exists but relevant information may not be available. The existence of qualitative factors does not usually permit a 'best' solution. The underlying problems and/or opportunities are unclear.

4 Ground-breaking cases

The terrain of these cases is new because the business situations described are totally new and little, if any, knowledge exists which is based on systematic research. The student must be ready to structure and organize the case data in completely new ways which may bear little or no resemblance to existing management concepts;

In general, the last three types of cases (2, 3, 4) are most often used in American-type MBA schools. In the preface to *Case Guidelines for the Case Teacher*, Jill Preston (1992) therefore writes: 'The Cases do not

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attempt to be representative nor do the studies aim to be prescriptive.

The aim of the guide is not to provide model answers but to suggest ideas and issues that could be addressed by students.' And, correspondingly, instructions to the *Case Tutor* by the Careers Research and Advisory Centre (CRAC) typically read as follows: 'We recommend strongly that Introductions from Tutors are kept short, and are not complex lectures and sufficient time be given to the student presentations at the end. Encourage them to tell you what they have learnt, rather than you telling them what they should have learnt.'

The skills to be developed through the traditional case method focus on the process and less on the content side of business management. Preston (1992) lists the following skills which students are expected either to utilize or to acquire during the process, namely:

- 1 analytical skills: classifying, organizing and evaluating material; recognizing when vital information is missing;
- 2 application skills: judging which techniques are appropriate and applying these techniques;
- 3 communication skills: oral and written skills are usually required, group work normally encourages the development of presentational skills;
- 4 social skills: group work involves listening, supporting, arguing;
- 5 creative skills: cases require creative ideas as well as analytical skills.

In order to achieve such skills acquisition, the students' needs for 'correct' answers are frustrated and instead the students are expected to generate their own solutions. Summarizing their view of the case method, Schlesinger, Eccles and Gabarro (1983) state:

For both the instructor and the student, Case learning requires sailing a very narrow channel between the rocks of over control and the shallows of ambiguity. The promise of the Case Method, for those who successfully thread their course in this careful manner, is not that it will produce an excellent administrator. Rather, the student, with the discussion leader's aid, will over time produce this transformation and embody the differences rather than being 'taught' them. In the Case Method, birds learn to fly; with other techniques, they are often given an airline pass.

In summary, students faced with a traditional case method are expected to have a high level of tolerance for frustration and ambiguity, since there are in general no 'correct' answers to be 'found'. Instead, the solution has to be developed with the assistance of a teacher/tutor who either withholds the 'correct' answer or does not have a 'best' solution to propose at the end of the exercise.

Cross-cultural variations of the case teacher's role

The traditional American case method, particularly the unstructured version requires teacher and student alike to think and act independently. However, it also requires them to work in groups which more difficult in individualistic Anglo-Saxon countries. In the more collectivistic countries, participants experience less difficulty with working in groups but more difficulty with independent decision making. Therefore, when applying the case method outside North America, it would be beneficial to pay more attention to the following two factors, namely the degree of structure expected of the case content (structured versus unstructured cases) and the nature of the case teacher's role (close or loose supervision and feedback). The former relates to Hofstede's UA dimension and the latter to his PD dimension.

Building on the arguments and reflections above, the authors propose a flexible adjustment of the traditional Harvard case teacher's role towards a more culturally appropriate behaviour offering more synergies for teacher and student alike. Concretely, the following roles are proposed.

Catalyst

The traditional Harvard case method, especially the unstructured version, fits very well with Anglo-Saxon students. Hofstede, for instance, writes:

Most British participants despise too much structure. They like open/ended learning situations with vague objectives, broad assignments, and no timetables at all. The suggestion that there could be only one correct answer is taboo with them.

Case trainers teaching in an Anglo-Saxon environment do not have to provide the best solution. The students are expected to see the teacher as a resource not as an absolute authority. In a related study, Laurent (1982) found that Anglo-Saxon managers did not expect their boss to have precise answers at hand to most of the questions that his subordinates may raise about their work.

In other words, the role of the case teacher should be to provide information when asked, to help students brainstorm alternative solutions to problems and to be a catalyst for the student's creative learning process. Anglo-Saxon students and managers can live with multiple solutions but expect the case teacher to be willing to engage in reasoned arguments concerning the strengths and weaknesses of their respective analysis and solutions.

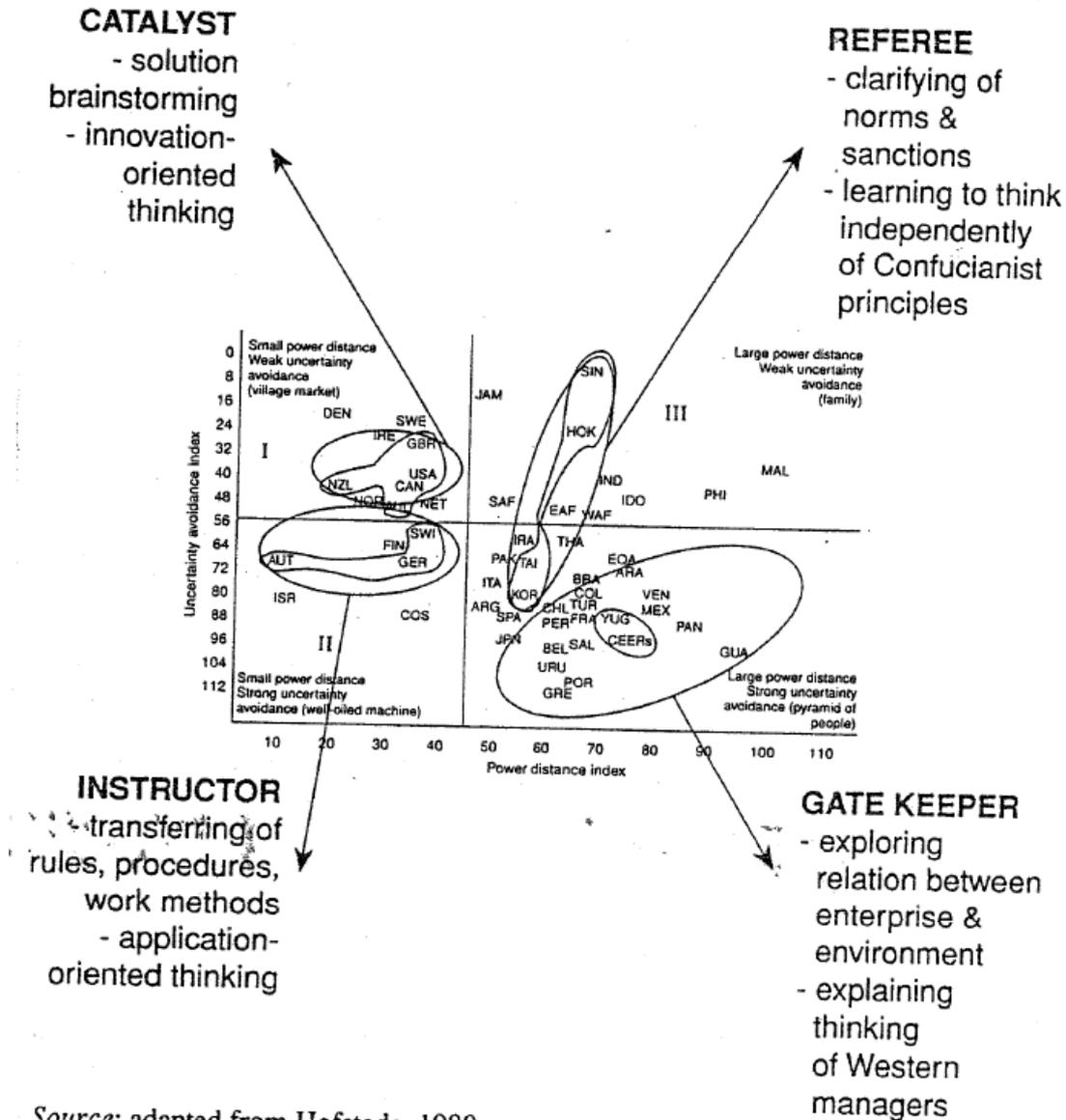


Figure 3 Role of trainer: case method

Instructor

Students and managers of the Germanic cluster favour structured learning environments. Pedagogical objectives should be defined, assignments preferably be detailed and timetables should spell out in detail how the learning will take place.

Concomitantly, they like tasks which are clearly defined. In return for hard work, they also expect the teacher to provide a best or 'better' solution. Hence, cases which are structured and broken up into distinct

steps and phases are clearly preferred over unstructured and open ended cases.

Regarding the case teacher's role, students and managers of the Germanic cluster expect a professorial distance between teacher and student. The professional role should be based on a sort of documented track record mostly in the form of high educational degree or many years of work experience in relevant field.

Hence, the case teacher should state the rules, procedures and work methods at the beginning and throughout the duration of the case. Regarding role play, he should also clarify what the teacher would consider 'objective' versus 'subjective' interpretations of the roles to be played. If possible, a case should be concluded with a critical assessment of the 'Kriegsspiel' and a presentation of a 'best' solution by the teacher.

Referee

Managers and students of Asian NIEs share similar concerns and preferences with their counterparts from the Germanic cluster countries. They also expect well-organized, well-structured case and dislike unstructured cases which do not offer 'best' solutions.

However, in contrast to the Germanic cluster, they expect the case teacher to provide relevant technical or even theoretical content either before or during the case exercise. They appreciate knowing the criteria which the teacher will use to evaluate their performances. Since they are very competitive and anxious to avoid making mistakes, it would be useful if the case teacher is not seen as being too 'laid back'. Such a perceived passive role would discourage them from expressing disagreement and from going through the necessary resolution of conflicts.

Case teachers who are not familiar with Southeast Asia should read up on Confucianism in order to understand the multiple misunderstanding (Pun, 1990) which could emerge between the teacher and the student role. Teacher and student are not expected to be equal, hence the teacher's role should be more traditional, more authoritarian and more paternal, though without going overboard. Value orientations of managers and students in Southeast Asia are changing (Saner and Yiu, 1993b), but the teacher/student role is still very much based on a personalized relationship.

Knowing about the competitiveness of the students and their fear of being seen as losers (face loss), the case teacher should clarify at the beginning that traditional Confucianist behaviour will be discouraged, that open disagreement is expected and that conflicts should be resolved through means other than solely avoidance behaviour.

Gate keeper

Management reality in the post-communist countries was characterized by continuous interferences by various government institutions which created high degrees of uncertainty despite their governments' emphasis on central planning.

Life in Central and Eastern Europe was at the same time structured and unstructured, over-controlled and under-controlled, forcing managers to be expert adapters and 'interpreters' of rules and regulations.

Students and managers of the newly democratic countries could potentially work well with semi- or even unstructured cases. However, two factors need to be taken into consideration:

- 1 Most students and managers do not know how Western economies are organized and even less how they actually function (Saner and Yiu, 1994).

On the other hand, they have been exposed to numerous ideological half-truths and propaganda items which makes it difficult for them to project themselves into the role of a Western businessman or manager. This conflict between, on one side, absence of accurate information and, on the other, the overcrowding of the mind by distorted and false propaganda reduces their ability to project themselves quickly into situations described by the case materials.

- 2 In the past, reality at school and at the workplace was characterized by authoritarianism. Deviant thoughts or behaviours were sanctioned and at times severely punished. To challenge a teacher or a superior openly would in general have put the challenger into difficulty. Hence, most students and managers learnt to hold back, to play act and to avoid behaviour which could have been interpreted as individualistic, asocial or intellectual. Hence, many students and managers learnt to 'bend' their logic and to please their superiors, be that teacher or boss; and not to insist on being right when faced with injunction by the respective authorities.

Case teachers working in the post-communist CEERs should be aware of the above and act as gate keepers who bring into the still 'closed' space information from the 'outside'. It would be useful to start from where the participants are and to allow them to discuss and criticize Western models and to provide them with the missing basic information. Traditional lectures on topics pertaining to problems described in the case would be most useful since this would facilitate participants' gradually understanding of the logic of Western business practices.

It would be equally beneficial if the case teacher could role model a

style of argumentation that provides for simple business logic and discourages sophistry, which most of them had to use in order to get by At school and at the workplace. To demonstrate cause and effect thinking with concrete examples drawn directly from the case would also be very much welcome. Cases which deal with personnel issues are particularly difficult since they imply practices and normative behaviour which did not exist in CEER countries before (e.g. participatory management, merit pay, performance appraisal, attitude survey, etc.); hence, they would require substantially more content input and discussion than cases focusing on accounting or manufacturing.

Cross-cultural variants of case method

While the above quoted American and British sources certainly help clarify that a case method is and what the tutor/teacher should do, they do not shed light on how the case method is or could be used outside the Anglo-Saxon cultural sphere.

The authors have used the Harvard case method in the USA with success. American MBA students and managers in general responded well to the unstructured case method and found the experience useful and challenging. However, this was not always the case in Western Europe, Eastern and Central Europe and Southeast Asia.

Drawing on broad teaching and training experiences, the authors first describe the difficulties they had in applying the traditional unstructured case method in other parts of the world. As a second step, an attempt is made to explain the variance.

The authors' teaching and training experiences described below are based on the following countries and approximate number of students and managers trained: 1) Germany and Switzerland (950); 2) Central and Eastern Europe (250); 3) Taiwan, Singapore, Hong Kong (590).

The observations, explanations and suggestions proposed below should be seen in the light of cultural relativity and should be taken neither as normative truths nor as complete 'recipes'. It is known that managers with many years of expatriate experience think and act differently than their national colleagues who have no expatriate work experience. Expatriates have often been exposed to Anglo-Saxon-style case seminars and are more at ease with the unstructured case method. This is in general not true for 'local' students and managers who are more used to non-American teaching methods. Examples of such culture-specific attitudes and behaviours follow below.

European and Asian resistance to use of US case method

Germany and Switzerland

Receptivity to case method

- 1 Faced with a generic unstructured case, German and Swiss participants tended to ask for more concrete details about the general situation of the company, its history, and the personal background of its leaders and the key actors of the case. Cases which did not explicitly mention a company by name were considered as too abstract, sometimes too artificial, but as soon as a company was identified by name, participants tended to have doubts about the objectivity of the information provided in the case material. Quite often, they would state 'but in reality, the situation is much more complex than that!'
- 2 A second observation relates to the process and time flow of the case. Participants demanded very detailed scheduling. Open-ended process structure made many participants anxious, partly because they said they did not know what to do with their free time should they have finished ahead of schedule, and partly because they preferred to receive feedback continuously and as early as possible. Many participants even preferred to be coached and given feedback at several intervals during the case.
- 3 Cases which were based on non-German/Swiss business situations Sometimes caused difficulties in regard to the comprehension of how for instance, American managers can take decisions and how they should relate to their superiors. The authors were frequently asked whether the participants' expected role behaviour was 'objectively' correct and whether their role behaviour was 'appropriate' and within the rules of the game of the case method.

Possible explanation

- 1 German and Swiss managers and officials are known to expect and communicate detailed information which Hall (1959) called 'low context' information. Information provided by case teachers working in Germany or Switzerland should therefore be as specific and concrete as possible and preferably descriptive of real business practice. Unstructured and generic cases can be experienced as too remote from reality and as a consequence the credibility of the case teacher could suffer.

Suggestion: The case teacher should avoid unstructured cases or provide sufficient additional information to 'ground' the case. They should also provide feedback at different stages throughout the duration of the case.

- 2 In contrast to American definitions of management which often emphasize the people factor, e.g. 'getting things done through others', most German and Swiss management theorists define management in instrumental and functional terms (Gmuer, 1991). Cases which focus on the people aspect of management are often instrumentalized by German and Swiss participants who turn the case into a simple policy exercise instead of exploring the issue through role play.

So German and Swiss management theory tends to focus more on 'hard' aspects, such as planning, controlling, organizing, than on the 'soft' factors like motivating, leading, staffing, etc. Preference goes to work methods, products, procedures and technologies. People management is seen as a sensitive and potentially problematic area. Conflicts are, for instance, mostly solved through compromising and avoidance behaviours (Saner and Yiu, 1993a). Hence the German and Swiss management approaches devote a lot of time to group decision making and co-ordination processes and less on open-ended explorations of interpersonal conflicts or group decision-making processes.

Suggestion: The case teacher should explain the benefits of role play, explicitly request the students to use role playing and at times role model him/herself the type of role play he/she expects the students to engage in.

- 3 German and Swiss managers are experts in designing and refining work methods. For example, a very popular group work method is 'Matalan' which resembles the American nominal group method but is more systematic and more structured. Other work methods have also been developed. German and Swiss companies are in general tightly managed and function in a seemingly 'perfect' way which can give an outsider the impression that a job seems to get done through some collective logic rather than through the specific actions of individual employees.

Suggestion: When using a case method with a culturally mixed group of international managers of a German or Swiss company, it might be advantageous either to explain to the other nationals how German/Swiss managers work and solve problems or to explain to the German/Swiss participants that other nationals might experience their work methods as too confining, and hence that they should accept a more unstructured work method during the case exercise.

European and Asian resistance to use of US case method

Central and Eastern Europe

Receptivity to case method

- 1 Managers of Central and Eastern European Republics (CEER) oftentimes do not understand the workings of the American market economy or even disagree with some of the basic assumptions of American capitalism, e.g. regarding the profit motive ('anti-social'), the setting of prices through demand and supply mechanism ('monopolies dictate prices'), or the contractual nature of American labour market practices ('exploitation'). If these differences in comprehension or opinion are not addressed by the teacher/trainer at the beginning of a case exercise, confidence can be lost quickly, the trainer could be perceived as manipulative and deceptive and the case exercise could be interrupted by argumentative discussions and confrontations.
- 2 An unstructured case may cause a sudden resurfacing of old normative behaviour in Central and Eastern European participants. For instance, students or managers who propose solutions which are competitive by Western standards but which could be seen by CEER standards as 'anti-social' or 'non-cooperative' sometimes suddenly criticize their own 'selfish' behaviour. Such 'self-criticism' was common during the previous authoritarian rule. However, if expressed again, this behavior can stifle the initiative and the unwillingness to take risks of the other participants and the remaining part of the case can become stale and contrived.
- 3 When asked to take full charge of the role assigned during the case, many CEER participants became uncomfortable with the notion of 'personal responsibility' in the Western sense of the word. To be responsible is sometimes seen as 'a trap' which should be avoided. Hence, many participants do not take decisions in order to avoid being held responsible later on. They often prefer to play their role in a reactive rather than proactive manner. As a consequence, the case exercise might stall and the case teacher might misinterpret the student's passivity as resistance or, worse, as personal criticism.

Possible explanations

- 1 CEER participants often do not know enough about the complex workings of a market economy and are therefore not sufficiently informed about how Western enterprises function.

Suggestion: Case teachers should give introductory lectures, explain Western economic models (Hargreaves, 1993) and be willing to

evaluate the premises of capitalism critically (Voros and Schmerhorn, 1993).

- 2 Coming from a background of authoritarian rule which sanctioned behaviour considered 'deviant' or 'false', CEER participants are not yet comfortable enough with open discussions of problems or with a situation where more than one 'correct' solution (Vansina, 1993) could be entertained.

Suggestion: Knowing the limitations of the previous management culture, case teachers should preferably use well-documented Western cases (Millman and Randlesome, 1993), provide 'best' and concrete solutions (Jankowicz and Pettitt, 1993) and use the case as an illustration of Western management practices rather than as a tool for direct management training (McNulty, 1982).

- 3 Participatory management was not practised in the past nor has it yet become an acceptable management behaviour in the post-communist countries (Welsh, Luthans and Sommer, 1993), hence students who are asked during a case exercise to develop or use management techniques like Management by Objectives or Performance Appraisal might simply not know what to do.

Suggestion: Cases focusing on human resource management and organizational issues within an American business context should be avoided or used only in conjunction with a preparatory lecture on Western-style HR management and organizational practice.

Southeast Asia

Receptivity to case method

- 1 Thinking that there should be, or might be, one best solution, and always concerned not to make mistakes in public, Southeast Asia participants often try to figure out the 'correct' answer expected by the case teacher. Hence, they tend to hold back and wait until the 'right' solution is either provided by the case teacher or agreed upon by the other participants.
- 2 Many Southeast Asian students and managers are unfamiliar with the unstructured case method and are correspondingly unhappy with the idea of not getting traditional teaching from a teacher seen as being an 'expert' in the field of management. They do not appreciate the idea of learning by doing, especially not if this presupposes 'learning from other students' who are seen as being either: less knowledgeable or less professionally or socially advanced than they are themselves.

European and Asian resistance to use of US case method

- 3 Oftentimes, Southeast Asian participants shy away from role plays which would require them to take charge of other participants of higher social status. Hence, role plays are often stale or ineffective. Conflicts do not get expressed or resolved, especially if the participant would have to sanction or manage other participants considered 'senior' to them by either age or positional power.

Possible explanations

- 1 Faced with unstructured cases which force participants to come up with their own, often contradictory solutions, Southeast Asian participants often experience a special form of anxiety relating to the so-called 'Losing of one's own face' phenomena. 'Face' or 'Lien' in Chinese contains two elements (Pun, 1990), namely, 'lien', representing one's moral character, and 'mianze', meaning the kind of respect or reputation achieved by oneself or awarded by others. A Chinese student conscious of 'lien' and 'mianze' will avoid making mistakes since 'face loss' would make him look ignorant which in turn might jeopardize his aspiration to be perceived as a gentleman or 'Junzi'.

Suggestion: Explain the purpose of the case method, use allegories to validate the need for involvement and exploratory action learning. For instance, reference can be made to wind surfing or bicycle riding which cannot be mastered without initial mistakes. It might be appropriate for the case teacher to focus on companies which none of the students directly represent (Whiteley and Tang, 1979).

- 2 Southeast Asian participants see training as an opportunity to get new techniques or insights from the teacher. Hence, they expect direct inputs from the case teacher, who is seen as an 'expert' or 'authority' who should provide students with new information and techniques on, for instance, 'how to conduct business more efficiently and more effectively' (Smart, 1983). Case teachers who do not offer accompanying 'content' lectures are often seen as either incompetent and uncooperative or, worse, as deceiving.

Suggestion: Case teachers should integrate cases into the larger context of general themes. He/she should group the themes together, provide theoretical notes on each theme (Lasserre and Putti, 1986) and give them a theoretical framework which can be used by the students to analyse the case.

- 3 Since the case method is embedded in a competitive context where students search for possible solutions, interpersonal conflicts and disagreements are inevitable. Groups and individuals co-operate

and compete with each other at the same time throughout most parts of the case exercise.

Always mindful of Confucianist principles, especially in regard to the 'correct' hierarchical relation between superior and subordinate, Southeast Asian managers and students avoid open disagreement and prefer to disagree by extracting themselves from the situation at hand (Saner and Yiu, 1986) or by becoming silent and uninvolved.

Suggestion: Before starting the case, the case teacher should clarify the rules of the game and state that case learning requires open challenging of other people's thinking and a verbalizing of one's own disagreements. He/she should establish a climate of openness and trust at the onset of the workshop and not mix participants with their direct superiors during in-house case seminars.

Cross-cultural variations of the Harvard case method: a German/Swiss example

The traditional Harvard case method is a powerful teaching tool. When used outside the Anglo-Saxon world, it needs however to be adapted to the learning styles and behavioural norms prevalent in the respective countries. The management teacher should first start by using educational methods which are more acceptable to participants, and then gradually move to more experiential methods (McCaffery, 1986). Other authors have also pointed out that case-studies need to be seen in a more ongoing learning context rather than as a one-shot deal (Reeves, 1992; Cochran and Gibson, 1986).

Having encountered difficulties in teaching the traditional case methods to non-Anglo-Saxon participants in Europe and Southeast Asia, the authors have created culturally appropriate case methods which fit the educational practices of the respective countries where they were supposed to be used. As an example, faced with the cultural expectations of participants from the Germanic culture group, a life case method was created which is based on a tightly woven schedule concrete assignments, real-life case background and expert coaching.

The life case method was first developed for a negotiation training seminar of top bankers of one of the big Swiss banks. Instead of using existing cases, the authors developed a detailed case simulation titled 'Moving West' which was based on an actual negotiation which happened in the past and whose outcome still influences the bank's current business. The negotiation case dealt with the financing of

- I. Selection of negotiation case
(representing key business transactions of client"organization)
 - II. Designation of case manager
 - III. Development of case simulation
(cooperation between external and internal consultation)
 - IV. Role play of case
(situational analysis, planning, negotiation)
 - V. Debriefing of case
(comparison of results and process feedback)
 - VI. Post-mortem of actual negotiation by case manager
 - VII. Relevance of case today and tomorrow
(policy implications)
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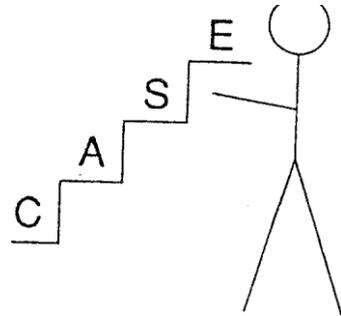
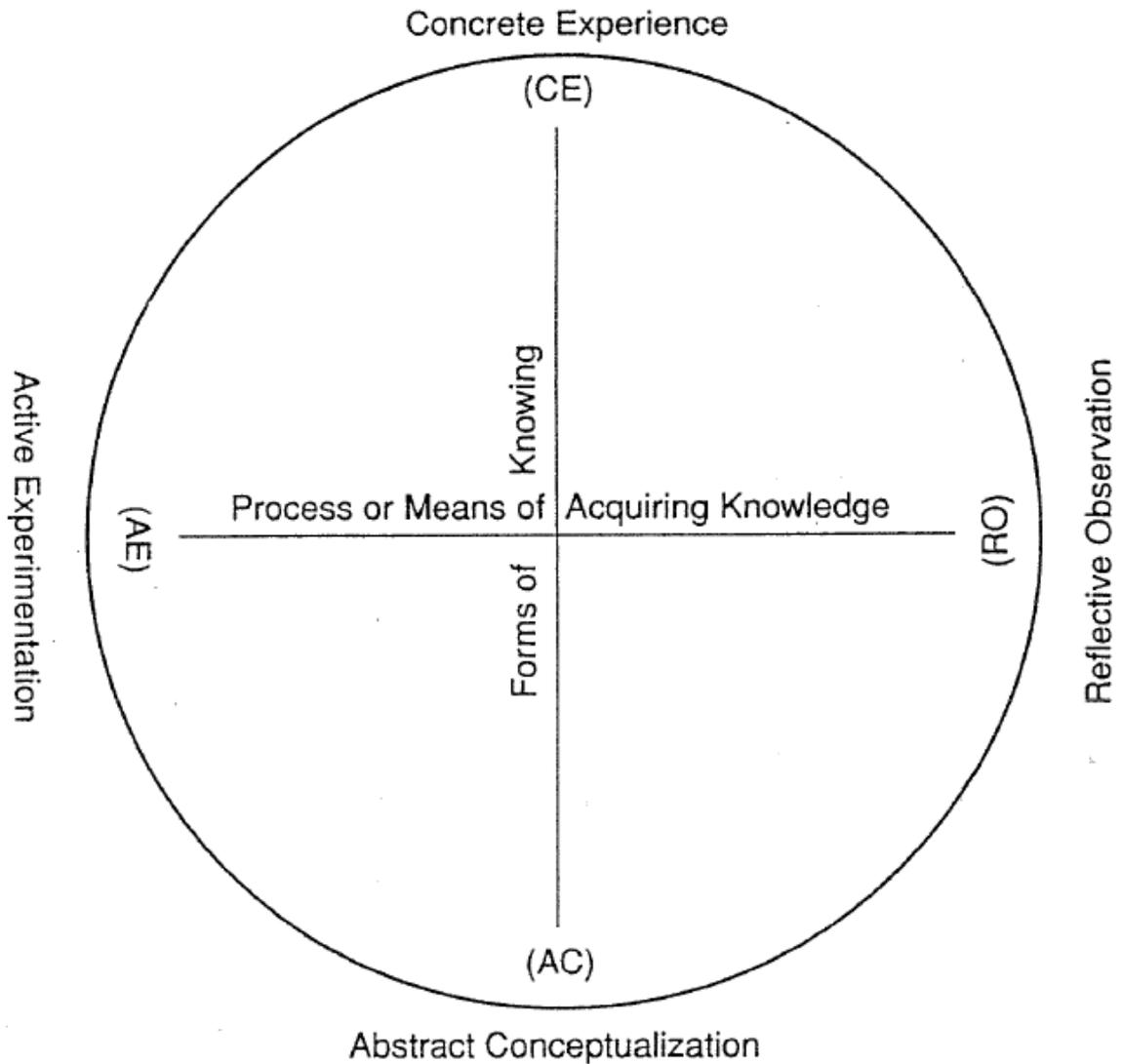


Figure 4 *Life case method*

merger, and acquisition loan for which three banks competed at the same time. A larger Swiss manufacturer wanted to acquire an American company and needed for this transaction a commercial bridge loan of more than US\$ 50 Million. Two Swiss banks and an American bank competed for this business. Hence the negotiation was at times bilateral, trilateral or plurilateral.

As a first step in developing 'Moving West' an agreement was reached between the authors and the client bank to select a banker who knew the case and who was able to co-develop the background information and role specifications in co-operation with the authors. The case was then played out in the seminar and the banker who actually conducted the historical negotiations joined the participants during the feedback session. Results obtained by the participants were then compared to the actual results reached by the banker in 1989. Conclusions were drawn regarding the lessons learned for the bank and a discussion followed on the future development of this case.

The detailed educational technology used for designing and teaching this negotiation case was based on Kolb's (1981) Learning Style Inventory. Kolb (1981) sees learning as an ongoing process of Concrete Experience (CE), Reflective Observation (RO), Abstract Conceptualization (AC) and Active Experimentation (AE). The



Source: Kolb, 1976.

Figure 5 Kolb's experiential learning model and selected descriptors

appropriateness of each particular emphasis depends on the learning challenge at hand. For complete learning to occur, all four approaches are seen as important contributors.

Working closely with an internal trainer of the client bank, the authors structured the case into small steps which were followed with feedback sessions and continued work assignments. Each step offered different learning goals and provided situations where Kolb's learning styles could be applied by the participants. The total case lasted one day, including a final feedback session in the presence of a member of the directorate.

This culture-specific on-going life case method offered concrete learning experiences which ranged from analytical tasks, group decision making, negotiating to public presentations. Furthermore, the

Chronological steps	Trainer inputs	Trainees' learning mode
1. Overview of life case methodology	ET	AC
2. History of case 'moving West' developments up to October 1989	IT	CE/RO
3. Assigning of participants to roles (Client Company, Banks AB, C)	ET/IT	CE/AE
4. Distribution of background information (public) and of role specifications (confidential)	ET	CE
5. Preparing checklist of relevant questions according to role assigned (individual work)		AE/AC/CE
6. Comparing of questions in plenary and handing out of consolidated checklist (all banks)	IT	CE/RO
7. Establishing of maxi-mini positions according to role assigned (individual work)		AEA/CE
8. Comparing of individual results and setting of consolidated maxi-mini position sheets (in groups of participants playing same role)	IT/ET	AE/CE
9. Distribution of strategic planning instrument	ET	
I 0. Completion of instrument and plotting of strategic field (individual work)		AE/CE
11. Comparison of individual results and setting of strategic position (in groups of participants playing same role)	ET/IT	AE/CE
I 2. Distribution of scoring sheet and key value sheet	ET	AE/CE
13. Explanation of ground rules and logistics	ET/IT	AC/CE
14. Planning of tactics (individual work)		AE/CE
15. Negotiation Rounds I, II, III, (in parallel negotiations)		AE
16. Summary of negotiation process (presentations by teams)		RO
17. Critique of negotiated agreements and of observed negotiation behaviour	IT/ET	CE/AC/RO
18. Presentation of actual agreement negotiated by Bank A (as of Nov. 1989)	IT	CE/RO
19. Discussion of future implications of life case to Bank A	IT & top management	AC/CE
20. Conclusions		

Note ET: External Trainer; IT: Internal Trainer.

Figure 6 *Life case 'moving West'*

historical and contemporary relevance of the case and the impact this transaction had for the bank's future business and business policy could be discussed in the presence of chief executives who joined the participants from step 18-20.

· The example presented above was designed for a learning environment characterized by Medium Uncertainty Avoidance and Low Power Distance (Hofstede, 1980) and by a preference for Low Context Communication (Hall, 1959). Other non-Anglo-Saxon contexts would require different culture specific adaptations. Cases intended, for instance, for Asian NIEs or CEERs would have to be adapted in order to address the local cultural conditions or the respective country and company culture. The final goal would be the same, namely to transfer knowledge and skills; it is the route to this that needs to be adjusted according to the educational norms of the country and expectations of the participants.

Conclusions

Starting with an overview of the case method, its origin and application in the USA and drawing on extensive experiences as management trainers, the authors have described various resistances to the use of the case method encountered in Europe (Germany and Switzerland), Southeast Asia (Singapore, Taiwan, Hong Kong) and Central and Eastern Europe countries.

After analysing the differences from a cultural perspective, the authors' proposed new concepts in regard to cross-culturally appropriate roles for the case teacher and in regard to the design of environmentally adaptive teaching cases. The article closes with an example of an alternative approach called 'On Going Life Case' which the authors applied to the specific cultural context of German Swiss banking trainees.

The traditional Harvard case method has been instrumental in furthering the teaching of MBA courses. Many MBA teachers and students around the world have benefited from this dynamic teaching method. At the same time, non-American teachers and students have become increasingly aware of the culture-bound limitations of the Harvard case model whose underlying values imply and encourage individualistic behaviour which does not offer a congruent fit with societal norms prevalent in non-Anglo-Saxon countries.

· The authors' concern focuses on teaching effectiveness and not on normative-ideological dogmatism. Using the standard Harvard case approach is simply not as effective in other parts of the world and

hence should be adapted if the goal is knowledge acquisition and skills training. However, at times, it might be useful to teach the case method in a traditional Harvard fashion in order to introduce non-American students to American behaviour and business practice.

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