

# Overcoming the Problem With Solving Business Problems: Using Theory Differently to Rejuvenate the Case Method for Turbulent Times

Journal of Management Education

2018, Vol. 42(4) 441–460

© The Author(s) 2018

Reprints and permissions:

[sagepub.com/journalsPermissions.nav](http://sagepub.com/journalsPermissions.nav)

DOI: 10.1177/1052562917754236

[journals.sagepub.com/home/jme](http://journals.sagepub.com/home/jme)



Todd Bridgman<sup>1</sup> , Colm McLaughlin<sup>2</sup>,  
and Stephen Cummings<sup>1</sup>

## Abstract

A questioning of the neoliberal consensus in the global economic order is creating turbulence in Western democracies. Long regarded as the only viable capitalist model, neoliberalism is now subjected to increasing scrutiny. Management education that has been aligned to a neoliberal worldview must now respond to this shifting landscape in order to retain its legitimacy. One core element of management education undergoing revision as a result is the case method of teaching. The case method's traditionally narrow focus on training students to solve business problems is increasingly problematic in an environment where the structure of the capitalist system in which firms operate is now a topic of debate. To address this, we argue for a reconceptualization of the case method's relationship with theory. This has conventionally taken two forms: a hostility to any inclusion of theory in the analytical process and an approach that uses theory as an instrument for profit maximization. We propose an alternative third approach that encourages students to engage in a critical questioning of business-as-usual

---

This article is part of the Special Issue “Management Education In Turbulent Times” in cooperation with the Knowledge and Learning Special Interest Group of the British Academy of Management.

<sup>1</sup>Victoria University of Wellington, Wellington, New Zealand

<sup>2</sup>University College Dublin, Dublin, Ireland

## Corresponding Author:

Todd Bridgman, Victoria University of Wellington, PO Box 600, Wellington 6140, New Zealand.

Email: [todd.bridgman@vuw.ac.nz](mailto:todd.bridgman@vuw.ac.nz)

capitalism from the perspective of multiple stakeholders, including managers, employees, unions, not-for-profit organizations, government, and the natural environment.

**Keywords**

case method, theory, business schools, Harvard Business School, management history

**Introduction**

We are witnessing a fracturing of a 30-year consensus around neoliberalism, a variant of free market capitalism based on globalization, deregulation, and a growing role for the private sector. These cracks were created by the financial crisis triggered a decade ago, an event with an economic impact second only to the 1930s depression. While the initial shocks passed relatively quickly, the resulting “Great Recession” triggered sovereign debt crises, money printing on an unprecedented scale, austerity budgets, rising unemployment, housing bubbles, and a rapid growth in wealth inequality and social dislocation. A challenge to the assumption, held by political elites in the West, of there being no serious alternative to neoliberalism gathered pace with the political shocks of Brexit, the 2016 election of Donald Trump on an “America First” agenda grounded in a rejection of globalization and the surge of Jeremy Corbyn-led Labour in the 2017 U.K. general election with its slogan “For the many, not the few.”

These are turbulent times, since ideas that have been largely taken-for-granted are now being contested, broadening the spectrum of political and economic debate. This broadening has implications for business schools, who must remain relevant to their stakeholders, but whose research and teaching have been important mediums for developing and disseminating the neoliberal worldview (Contu, 2017; Fleming & Oswick, 2014; Thrift, 1997). If we accept that the global business and political environment has changed, then, so must business schools to retain their legitimacy (Bradshaw, 2017). A positive step, we believe, would be greater engagement with a critical management pedagogy (Reynolds, 1997), which encourages “critical reflexivity,” a questioning of dominant assumptions and ideologies that underpin management and organization (Duarte, 2009). This should not be seen as rejecting one ideological worldview for another, but as enabling students to appreciate a multiplicity of views and to understand their political, economic, social, and environmental implications for managing, organizing, and for society (Hibbert, 2012).

In assessing what we, as management educators, should be doing to develop our own skills as critical reflexive practitioners (Cunliffe, 2004), as well as helping our students prepare for this new environment, we focus in this article on the case method of teaching, probably the dominant mode of management education for a century. The case method originates from Harvard Business School (HBS) and is inseparable from the HBS brand, being the cornerstone of its lucrative MBA and executive education programs and providing a significant revenue stream through sales of cases to business schools around the world. HBS and its case method are important symbols of business schools' neoliberal embrace, argues McDonald (2017) in *The Golden Passport*, a stinging attack on HBS' failure to "foster a meaningful ongoing discussion of the nature of capitalist society and the role of the firm within it" (p. 4). For McDonald, the case method is at the core of this failure, since it privileges the perspective and interests of capitalist firms and fails to link management actions to wider societal concerns.

We agree with McDonald that the case method, with its narrow focus on training students to solve business problems, is not fit for purpose in a post-neoliberal consensus world. Rather than argue for its abandonment though, we make the case for rejuvenation, so that it can be the medium through which students critically evaluate the relationship between business and society. In doing so, we look to the case method's past as a source of inspiration for its future development. After all, there are strong parallels with events of nearly a century ago—a period of free market capitalism followed by financial, economic, and social crises, greater intervention by the State in the economy and the ascension of populist politicians who attack the establishment and promise to make their countries "great again." However, as Bridgman, Cummings, and McLaughlin (2016) note, it is difficult for management educators to learn the lessons of the past, because of the histories available to us. A belief in management prerogative, private enterprise and a limited role for the state has underpinned the field of management studies since its inception, with the result that events inconsistent with this narrative are often either misrepresented in histories of our field, or omitted completely. So, we need to explore fragments of the past that have been overlooked by history and use those fragments as a tool for creative thinking about our present challenges.

To fulfill the case method's promise, we argue a more expansive role for theory is required. We briefly review the narrow debate over theory at HBS, with it seen as either having no role, or merely providing a tool for managerial problem solving. Neither approach can address the challenges of today's turbulent times, yet while critical management educators see little to celebrate in the history of HBS, we argue that by looking again at HBS during the crisis of the 1920s and 1930s, we can draw inspiration for a rejuvenated, more critical

case method. Our brief foray into HBS' past highlights the limitations of the case method in its dominant, problem-solving form. When faith in free market capitalism was shaken nearly a century ago, the school's leader recognized the case method's firm-level focus was insufficient. Rather, discussion was needed on the pressing, fundamental issues concerning the relationship between business, government, and society. This promise for a reformulated case method was not fulfilled, but given the parallels between those times and today, we can learn from this past to articulate a new role for theory.

We present this as three ways in which case writing and teaching can be different, combining insights from the historical analysis with our own experiences of writing and teaching cases. Our cases are not just about managers, but also employees, customers, unions, not-for-profit organizations, and government. They do not limit students to solving business problems, but instead require an engagement with theory to understand management and organization from multiple perspectives. They also encourage students to question critically the structures of capitalism, challenging students' preconceived notions of what the study of management is about. By bringing together insights from the case method's past with learning from our own case method practice, we aim to rejuvenate the case method for today's turbulent times.

## **The Case Method's Relationship With Theory**

Nearly 100 years ago, HBS Dean Wallace Donham outlined his vision for the school as "giving the student training for practice in dealing with business problems" (1920, as cited in Copeland, 1958, p. 77). Fast forward nearly 100 years and not much seems to have changed. The case method develops judgment, defined as the ability to make tough, business decisions in a highly competitive global market (Anteby, 2013; Simons, 2013). The importance of this bias for action, the "raison d'être of the case method" (Garvin, 2003, p. 62), designed to simulate the reality of corporate leadership, is reflected in submission criteria to leading case journals and competitions. Typically required is a compelling story about a protagonist facing a dilemma, requiring decisions to be made and action taken (Lundberg, Rainsford, Shay, & Young, 2001).

Developments in the case method throughout the past century have largely taken this managerial decision-making focus as given. *Journal of Management Education* has been an important forum for these advancements, which include: developing case videos (Rappaport & Cawelti, 1998), getting students to write cases rather than just analyze them (Bailey, Sass, Swiercz, Seal, & Kayes, 2005; Vega, 2010), adapting case teaching to online environments (Rollag, 2010; Watson & Sutton, 2012), incorporating design thinking

into case writing (Sheehan, Gujarathi, Jones, & Phillips, 2017), and using students' own experiences as the case material (Foster & Carboni, 2009). And while new modes of delivery such as simulations and experiential learning now supplement the case method, they are refinements of the same approach—training students to solve business problems.

This singularity of purpose has led to criticism that the case method, with its “profit-maximization toolkit” (Koris, Örténblad, & Ojala, 2017, p. 183), breeds managers who value greed over ethics (Contardo & Wensley, 2004), who struggle to see beyond a reductionist and financialized perspective (Hühn, 2014) and whose actions caused the financial crisis and turbulence we see today (McDonald, 2017). As a result, it tends to be seen by those committed to a critical management education, with its tenets of antiperformativity, reflexivity, and denaturalization (Fournier & Grey, 2000), as being beyond redemption, since it cannot accommodate a challenge to managerialism and neoliberalism (Contardo & Wensley, 2004). This is frustrating for those, including ourselves, who see the potential for a radically different case method.

In a business environment where the continued dominance of a neoliberal worldview can no longer be assumed, business schools face fresh challenges to their legitimacy (Pettigrew & Starkey, 2016). Since the financial crisis, business schools have given business ethics, corporate social responsibility (CSR), and sustainability more emphasis in the curriculum. There is also a growing Principles of Responsible Management Education movement, which promotes an inclusive and sustainable global economy, society, and environment, and is underpinned by the values of the Union Nations global compact. These are welcome developments, yet the case method is still celebrated for being the same as it ever was, in terms of training students to solve business problems (Simons, 2013). It is out of step with the critical, reflexive, multi-perspectival view that students now expect of their management education (Koris et al., 2017). Radical innovation of the case method is required and we argue that can be achieved through a new rapprochement with theory.

To date, there have been two dominant approaches regarding the use of theory in case teaching: permissive and structured. The permissive approach has its origins in Donham's first formulation of the case method and its purpose for HBS. A graduate of Harvard Law School, Donham believed its case-based approach would be ideally suited for his mission of the business school—delivering a practical training in solving business problems. Students would learn how to determine the relevant facts of each case, generate a series of options for resolving the problem, and then, crucially, deliver their judgment in the form of action (Copeland, 1958).

Donham encouraged his students to read widely in the social sciences, but he did not want them to apply theory (in the form of principles, concepts, or

frameworks) to cases. Partly this was due to the state of business administration theory in 1920. Research was dominated by economists and there was little study of the business executive's perspective. In the main, however, it was Donham's distaste for the lecture method, which he saw as stultifying the enthusiasm of students and preventing them from taking responsibility for their own learning (Donham, 1949). Donham propagated his view among his HBS colleagues. Ulrich (1953, pp. 25-26) found that if students were asked to apply theory to cases, "the majority responds to each case problem according to some stereotyped approach." Bailey (1953)<sup>1</sup> agreed, saying this was appropriate for a liberal arts college, but not for a business school.

Donham's conception of the case method was not universally shared, however. Wray (1953), in a review of Kenneth Andrews' (1953) book describing HBS' approach, was "alarmed at the anti-scientific and anti-intellectual connotations" of focusing case discussions on how individuals should act (Wray, 1953, p. 459). This "exercise in amateur psychoanalysis" was encouraged by "the deliberate discouragement of the use of principles or generalizations for analytical purposes" (p. 458).

Gradually, Donham's permissive approach was supplanted by a structured approach, which involved students applying a concept, model, or framework to the real-world situation (Griffiths, 1963; Ramsey & Dodge, 1981). In contrast to the dearth of human relations theory in 1920, by the 1950s the field was flourishing, leading Griffiths to conclude "there is no longer any reason why a person should say he does not have any theory or concepts with which to handle administrative situations" (Griffith, 1963, p. 85). Advocates of the structured approach agreed with Donham that business education should be a practical training in solving business problems, but they wanted to use the tools that this science of management was producing (Roethlisberger, 1954).

The structured approach was given further momentum by changes in the professional advice industry. During Donham's tenure, firms such as McKinsey & Co hired experienced, midcareer managers. Following McKinsey's death in 1937 Marvin Bower, an HBS graduate, took control of the struggling firm and in a radical shift, set about hiring fresh business school graduates with a sharp intellect, enthusiasm, and an entrepreneurial mind-set. Their job would involve creating and selling management ideas—specialist tools that could solve corporate problems—and Bower's close ties with HBS gave him access to the school's top graduates, the Baker Scholars. The structured approach to the case method was a perfect fit in this new environment (McDonald, 2017; O'Shea & Madigan, 1997).

The limitations of the structured approach were debated in the pages of this journal in 1981. HBS' Arthur Turner (1981a) lamented that while students became skillful at applying complex theories, this bore little resemblance to what managers actually did when solving organizational problems. Turner (1981b, p. 36) concluded that "using case discussion mainly to 'teach' conceptual ideas is not only inefficient; it can interfere, perhaps fatally, with accomplishing the other purposes for which the case discussion process is best suited."

If the purpose of a management education is solely to be trained in solving business problems, both the permissive and structured approach have their merits. Critics of the structured approach are correct when they highlight Argyris and Schön's (1974) theories of action and their distinction between espoused theory and theory-in-use to make the point that managers do not typically consult theoretical models when solving problems. However, if the purpose of a management education involves more than that, such as critically questioning the merits of the rules of the game within which organizations operate (i.e., the structures of capitalism), the myopic focus of the case method in these forms becomes problematic. The theory-free, permissive approach provides no space or resource for "questioning the underlying assumptions sustaining managerialism or acknowledging problems that may subvert the dominant capitalist system" (Contardo & Wensley, 2004, p. 212). The structured approach is not much better, for while it gives theory a role in case analysis, it is also wedded to the problem-solving, profit-maximizing approach.

Their limitations are exposed during periods of turbulence like we face today. At these moments, the problem-solving approach becomes problematic, because it is concerned with making assumptions rather than examining them (Jacques, 1996). Those who recognize this and want a different case method see HBS as a lost cause. Greenhalgh (2007) points the finger at HBS for breeding the scientific problem-solving approach and suppressing problem posing, creative alternatives. And while Rendtorff (2015) and Jackson (2011) share our interest in thinking about the potential for the case method to engage meaningfully with theory, they conclude that HBS is not interested in theory. We depart from these studies in one important respect—they all see innovation as coming from somewhere other than HBS. It is our contention that HBS has a more diverse and interesting past that is conveniently forgotten by supporters, and therefore unseen by the critics—a past which can inspire a rejuvenated role for theory and a case method that is a better fit for today's challenging times.

## Recovering a Critical, Reflexive Role for Theory

Donham was greatly influenced by Alfred North Whitehead, a faculty member of Harvard's Philosophy Department between 1924 and 1937 who is recognized for providing the intellectual foundation for the case method's action orientation (Barnes, Christensen, & Hansen, 1994; Cruikshank, 1987). Whitehead saw it as a mistake to distinguish between institutions that pursued abstract knowledge and those concerned with its application. He wished for the university to be a place where "purposeful activity, intellectual activity, and the immediate sense of worth-while achievement, [is] conjoined in a unity of experience" (Whitehead, 1933, p. 444). Whitehead took an interest in Donham because HBS and its case method illustrated perfectly his argument.

Not mentioned in most historical accounts of Whitehead's ties with HBS is his views on the developing crisis in the United States. In *Science and the Modern World* (1925), Whitehead (1925) described the dangers to democratic societies caused by rapid change combined with an increasing specialization of knowledge, which "produces minds in a groove" (p. 275). What was needed was "to strengthen habits of concrete appreciation of the individual facts in their full interplay of emergent values," rather than the traditional approach studying abstract ideas divorced of values. This was particularly pressing in the era of scientific materialism and the ascent of free market principles, where an obsession with "material things and of capital" (p. 284) had excluded a consideration of values: "they were politely bowed to, and then handed over to the clergy to be kept for Sundays" (p. 284).

Donham's own thinking was greatly influenced by Whitehead. He invited him to present a lecture at HBS, which subsequently appeared as an introduction in Donham's (1931) book *Business Adrift*. In it, Whitehead outlined this theory of foresight: "such a reflective power is essentially a philosophic habit: it is the survey of society from the standpoint of generality" (Whitehead, 1931, pp. xxvi-xxvii). What he advocated was not a study of business in society, but a study of society, based on a philosophic outlook, in which business plays an important part. While at the start of his tenure as dean, Donham had defined "judgment" narrowly as being able to make decisions and take action to solve business problems, as the social and economic crises of the 1920s and 1930s escalated, destabilizing the capitalist system and raising the genuine possibility that it might topple, he came to realize that a more expansive notion of judgment was required of HBS faculty and students. The breakdown of capitalism could be overcome, he believed, "but not without leadership that thinks in terms of broad social problems instead of in terms of particular companies" (Donham, 1932, p. 207).

Donham recognized that if managers each pursued profit-maximization strategies in the short term, the crisis would worsen. In *Business Adrift* he called on managers to maintain their workforces despite falling demand for their products, and to reduce working hours while maintaining workers' pay, so they could stimulate demand by spending money in their leisure time. Reviews of the book noted its "radical, indeed socialistic" ideas ("Dean Donham's speech," 1932) and the "philosophical undercurrent" beneath the learning at HBS ("Review of *Business adrift*," 1931, p. 46). Whitehead's tribute to Donham on his retirement in 1942 (p. 236) credited him for shifting the purpose of a business education from "decisions once based on the personal interests of industrial leaders" to a deeper and more sophisticated understanding of the role of business in society.

This aspect of HBS' past is curious for two reasons. First, while Donham and Whitehead feature prominently in histories of the HBS and the case method, their normative views about the state of capitalism and an expanded conception of business education do not. It is this past, forgotten by history, which can help us rethink the form of the case method today, as we shall explain shortly. Second, while Donham came to understand the limitations of the case method as he originally conceived it, there is no evidence it became something different as a result. He looked to other areas of the curriculum for cultivating foresight amongst the student body, while the case method remained theory-free and focused on training students to solve business problems (Cruikshank, 1987).<sup>2</sup>

This was a disappointment for Ordway Tead, a theorist of workplace democracy who had taught with Donham at HBS and had seen great promise for it as a vehicle to deliver Whitehead's vision. In his review of Andrews' (1953) book, Tead (1953) argued that all judgment depended on social values, but at HBS "there is no adequate scrutiny of preconceptions and values" (p. 105). Tead (1953) concluded it "a pity that there is no longer an Alfred North Whitehead to help to lead the technicians out of the bleak wilderness of techniques" and until a more philosophical outlook was incorporated into business education "the method of instruction, including the provocative case method, will remain thin and inconclusive" (p. 106).

We believe Tead's concerns remain as valid today as they did then. While the management *curriculum* is evolving to give more emphasis to a consideration of values, the potential for the case method, as a *pedagogical tool* to deliver a philosophically informed, critically reflexive experience for students, is yet to be fully realized. This is much needed, given the parallels between the events of the 1930s and today. So what might a case method, grounded in this critical philosophical pedagogy look like in practice? In the

following section, we focus on three features and illustrate these by drawing on our case writing and teaching experiences.

## **How Case Writing and Teaching Could Be Different**

### *Seeing Cases as a Means for Developing Understanding of Organizations and Their Place in Society, Rather Than Just for Training Future Managers*

As we have shown through our brief historical survey, throughout most of its 100-year history, the case method has been seen as a tool for training future managers. We think this assumption, shared by the call for this special issue, is worth reflecting on. Is education *for* management, as opposed to an education *of* management, really our mission? Only a proportion of our students will become managers, but virtually all will, or have already, become employees. Rather than the standard approach of writing cases that position students in the “shoes” of a manager, why not put them in the shoes of an employee? Or why position them as any individual in a case? Or why place the organization at the center of the analysis? While some case writers have moved away from a shareholder perspective of the firm and adopted a stakeholder lens to engage with issues of sustainability, CSR, and ethics, this remains an organizational-centric perspective, where the interests of other stakeholders are to be assessed and taken into account when making a decision for what is best for the organization. While it is important that students are exposed to this perspective, Donham, Whitehead, and Tead came to understand the need for a deeper analysis of the relationship between business and society, where the interests of business do not take priority over the interests of other stakeholders, where students are invited to consider competing interests as inevitable and legitimate in a democratic society, and where the assumptions and practices of contemporary capitalism might be critically engaged. We have found that unpacking the complex relationship between business and society is helped by drawing on theoretical tools from beyond the mainstream of the business school curricula, such as sociology, political economy, law, and industrial relations.

Some of our most successful cases do not have a central protagonist and invite students to consider a range of conflicting interests from multiple perspectives. One is about the industrial dispute over the filming of *The Hobbit* in New Zealand in 2010, where following the passing of a “do not sign the contract” motion by the International Federation of Actors in pursuit

of collective bargaining and an improvement in terms and conditions of employment, Warner Brothers threatened to relocate the production offshore. In doing so, Warner Brothers was able to extract from the New Zealand government a change in labor law, which effectively removed all employment rights from anyone working in the film industry, and an additional NZ\$33 million in taxpayer subsidies on top of the \$60 million already secured. This is a case which lends itself to an analysis of the power of multinational corporations and the influence they can have over government policy. It highlights the value of a critical approach to the study of globalization in its exploration of issues of power, conflict, and inequality. It considers the tensions between attracting foreign direct investment and protecting workers' rights, and the extent to which the pursuit of economic outcomes by government should take account of equality and fairness. And it assesses the possibilities for workers to organize collectively in trade unions both locally and internationally to counter the power of global capital and to prevent social dumping and a "race to the bottom" in labor standards.

### *Problematize Assumptions About the Desirability and Inevitability of Neoliberalism*

A recurring response by business schools, accreditation agencies, and the consulting industry to economic crises and business scandals through the past three decades of neoliberalism has been assurances that managers are professionals who can be trusted and, relatedly, that the free market and a minimalist role for the state is desirable. According to prominent businessman Charles Handy (2002, p. 55), unless managers act ethically, "democratic pressures may force governments to shackle corporations . . . and we shall all be the losers." Following Enron and other scandals the Association to Advance Collegiate Schools of Business (2004, p. 7) said that "at issue is no less than the future of the free market system, which depends on honest and open enterprise to survive and flourish." And in the aftermath of the global financial crisis, Dominic Barton (2011, p. 86), global managing director of McKinsey & Co warned business leaders of the potential for "the social contract between the capitalist system and the citizenry [to] truly rupture" with governments stepping in to assume control. We do not wish to deny the legitimacy of a neoliberal view, but we find it disturbing that the ideological preference of business leaders, business schools, and their accrediting bodies has attracted such little scrutiny, especially in a world where Brexit and the election of Trump signal a growing unease with this model of capitalism.

Donham's (1931) very public criticism of laissez-faire capitalism in *Business Adrift* seems incongruous given the almost uncontested view of HBS as a cheerleader for the free market (McDonald, 2017). It was appropriate then to question the inevitability and desirability of the prevailing capitalist model and we believe it is appropriate again today. We have learnt, from our own writing and teaching efforts, that such questioning can be accommodated and fostered by the case method. One of our cases looked at the closing of a call center in Ireland by TalkTalk, one of the United Kingdom's largest telecommunications providers, with the loss of 575 jobs and 30 days' notice. Under Irish redundancy law, companies must enter into a period of consultation of at least 30 days with employees in a redundancy situation, so that the parties can consider alternatives to redundancy. TalkTalk met the minimum legal notice period requirement, though there was no meaningful consultation and the decision was irrevocable, despite lobbying from senior government ministers who asked them to reconsider or at least extend the period of notice, which might allow for the call center to be sold as a going concern and the jobs saved. Government ministers and high-ranking civil servants claimed this was irresponsible corporate behavior by TalkTalk, but when pressed on enhancing employment rights their response was that ethical behavior, rather than more regulation, was all that was needed.

We present TalkTalk's CSR philosophy and invite students to consider the extent to which CSR is a genuine attempt on the part of organizations to engage with important social and ethical issues as opposed to window-dressing behavior. We also ask them to consider the role of regulation in protecting the interests of other stakeholders in a democratic society. One of the most significant policy debates over the past 15 years has been between voluntarist approaches and "hard law" when it comes to aligning corporate behavior with the interests of society. The discourse of "better regulation principles" has led to a shift away from legislation toward "light touch" regulation, self-regulation, and other forms of "soft" governance, with firms encouraged to go "beyond compliance" and adopt a long term or "enlightened shareholder value" approach to performance (McLaughlin & Deakin, 2012). We ask our students to draw on regulation theory and debates over hard and soft law in considering how effective that shift has been in this case.

### ***Writing Cases That Encourage Students to Challenge the Agency of Managers***

The case method, when viewed as a training in solving business problems, makes one further assumption that is worth reflecting critically on in

turbulent times: that managers have high levels of agency—in other words, that they are powerful people whose decisions have a large impact on their organizations. Make well-considered decisions and the problem will be solved, make poor decisions and the problem will worsen, perhaps threatening the viability of the organization. This assumption that “managers matter” underpins much mainstream theorizing. In leadership, this is attested to by the emphasis given to transformational leadership, and more recently authentic leadership—the assumption being that charismatic and genuine leaders can transform their companies by generating high levels of commitment. In culture, there is a prevailing view that strong and skillful leaders can shape organizational cultures according to their desires, and that if the culture is dysfunctional, then leaders have both the responsibility to fix the problem and the power to do it (Schein, 2004). Yet contradicting this image of the all-powerful manager is the growing recognition of “wicked problems,” whose size, complexity, and interconnectedness with other problems, makes them very difficult or even impossible to solve (Churchman, 1967). Donham learnt this through his experience of labor unrest and financial crisis and through his intellectual engagement with Whitehead. While Donham’s initial formulation of the case method ascribed much power to managers, and while he always believed that business leaders had a vital role to play in society, he also understood the power of macro-economic and political forces.

Theory can play a useful role in helping students problematize assumptions about the agency of managers. For example, in our case about culture change in a national police organization following sexual abuse allegations involving officers, we first place students in the position of the Police Commissioner and ask them to devise a culture change initiative. We then introduce them to critical approaches that see culture as evolving over time and being created by all members of the organization as they make sense of their experiences. This enables us to discuss with students the limits of the Commissioner’s power, given the large, old and geographically dispersed nature of the organization, as well as the dangerous nature of frontline policing and how this shapes the shared values of police officers. This case also lends itself to drawing on theorization around power, resistance, and identity.

We have also written cases that consider the wider structural features of global capitalism and how the short-term focus of capital markets on quarterly reporting and the fear of hostile takeover incentivizes managers to avoid long-term value creation strategies, such as investing in sustainability or more ethical employment standards. As Reich (2008) argues in his book *Supercapitalism*, our current economic system is good at increasing returns for investors, but poor at dealing with the social and environmental issues of

our time because of the relentless systemic pressures for firms to lower costs and increase profits. Understanding the relationship between managerial agency and financial capitalism is important for gaining insight into organizational decisions, but these cases need theory to illuminate their dynamics. This need not be telling students what to think, as Donham feared, but of providing them conceptual lenses to unpack these complex features and see them from multiple perspectives. The result is a more realistic view of practice resulting from the engagement with theory.

## **Conclusion**

In thinking about what we should be doing to advance management education in today's turbulent times, we have argued for a reformulation of the case method as an extension of a critical management pedagogy. In doing so, we contribute to the literature on developing critical reflexivity (Cunliffe, 2004; Duarte, 2009; Hibbert, 2012) and highlight the possibilities for the case method to be a medium for teachers and students to engage in an examination of the impacts of macro forces on organizations and managers and how this shapes the micro level of attitudes, emotions, and behaviors by managers and employees.

In this quest, we would be wise to look to history for guidance. The difficulty is that some of the best lessons that could be drawn from the upheaval of the 1920s and 1930s have been airbrushed out of management's history. The only event that has garnered major coverage from this period is the experiments conducted at the Hawthorne Works by Elton Mayo from HBS, where it was discovered (supposedly) that a happy worker is a productive worker, and that by allowing employees to satisfy their social needs, significant productivity gains can accrue.<sup>3</sup> You cannot learn from management textbooks, or most institutional histories of HBS (Copeland, 1958), or most histories of the case method (Garvin, 2003; Gill, 2011; Merseth, 1991; Mesny, 2013), about the past that we have shone a light on in this article—of an HBS dean whose mind was preoccupied by the social and economic catastrophe unfolding around him. Of a dean dismayed by a capitalism that seemed out of control and by business leaders complicit in feeding its excesses. And you cannot learn of his belief in the need to fundamentally rethink the relationship between business and society, and the role of business schools.

A large part of why this particular forgotten past is important to us now is because of the similarities between those times and today. In the last decade, we have experienced a financial crisis and the move to a more active State in regulating the economy. There are also concurrent fears, in the rise of Trump and in Brexit, of a repeat of a more sinister movement toward isolationism

along the lines of that witnessed in Europe and America in the middle of the 20th century. In these times, we need to question and debate our systems of governance and economic management, as Donham, Whitehead, and others did. Although they did not utilize the case method for this purpose, we can—and we must if we are to develop a case method that is fit for purpose. To do this requires a rapprochement with theory. Not in the way Donham originally intended, which was to use the case method as a means of developing general principles of managing. And not in the structured approach which became institutionalized after World War II, where models, concepts, and frameworks are applied in a mechanistic, instrumental way to business problems. Rather, we can use theory as an important lever to problematize the status quo.

We support Parker and Parker's (2017) call for critical case writing that highlights alternative forms of managing and organizing, and alternative business models, such as for-profit Benefit Corporations (which meet higher standards of accountability and transparency), cooperatives, not for profits, NGOs and public sector organizations. While positive cases such as these are important and can be inspirational, we also learn from past mistakes. Thus, we need also cases which focus on worst practice, not only so that our students learn about unethical and irresponsible management behavior but also that they consider questions of managerial and corporate power and how it might be socially desirable to place limits on that power in order to improve societal outcomes, whether that be through government regulation or empowering other social actors, such as trade unions or NGOs, to act as a countervailing force. We need cases that demonstrate how our understanding of the pressing issues society faces is enhanced by taking into account a wider range of perspectives, including employees, consumers, civil society, local communities, government, and the natural environment. And we need cases that encourage our students to question current forms of capitalism, rather than to place such questioning outside the bounds of legitimate analysis. The approach to the case method we have outlined, and illustrated with cases that we have written and taught with, can achieve this.

We are not the only ones advancing this agenda. We know from our own experimentation with the case method, and talking with others about their experiences, that cases are used in a myriad of ways. While diversity is beginning to take hold, unfortunately there is a dominant orthodoxy which reduces these alternative approaches to second-class status. We realized this when we considered entering leading case competitions, most of which see decision-forcing cases written on companies and approved by them for publication as being the "gold standard." While there are exceptions, such as the Dark Side competition<sup>4</sup> organized by the critical management studies division at the Academy of Management, this blinkered view of what constitutes a

high-quality case is the norm, rather than the exception, a norm reinforced by submission guidelines for leading case journals (Bridgman, 2010).

The challenge remains then, of how to gain legitimacy for a critical, reflexive, philosophically informed case method that is radically different to the current HBS variant, which appears to have 100 years of history on its side. We suggest looking at HBS' past with fresh eyes. It is not just that today's turbulence parallels what was experienced by Donham and Whitehead. It is that they saw the need for a business education that questioned capitalism. In this way, the case method we have articulated here is not a departure from HBS' past, but a return to it. We can realize the promise that was not fulfilled back then. To do all of this, to seize the window of opportunity that turbulent times present, we need theory to play a new, active, critical, and creative role in the case writing and teaching process.

### Declaration of Conflicting Interests

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

### Funding

The author(s) received no financial support for the research, authorship, and/or publication of this article.

### ORCID iD

Todd Bridgman  <https://orcid.org/0000-0003-3120-0075>

### Notes

1. It would be misleading to suggest, however, that Donham was antitheory. Paradoxically, he believed in the case method as a means of generating theory, as had been the case in law, with general principles derived from the study of individual cases. The first article in the first issue of *Harvard Business Review* detailed his plans for developing "a broad executive theory" (Donham, 1922, p. 1); "business needs not less theory, but much more" (p. 2).
2. Bridgman et al. (2016) explore other reasons for the unfulfilled promise of the case method, including the onset of a Second World War, a period of relatively stable capitalism following that war, and pressures on business schools to generate rigorous research to improve their legitimacy within universities.
3. This simplistic narrative is challenged by Hassard's (2012) account, which shows that American industrialists were aware of the influence of social factors on the workplace before Mayo's experiments at Hawthorne.
4. The competition aims to recognize case writing that investigates the dark side of contemporary capitalism. Details are at <http://cms.aom.org/awards-and-competitions/dark-side-case-writing-competition/>

## References

- Andrews, K. R. (1953). *The case method of teaching human relations and administration*. Cambridge, MA: Harvard University Press.
- Anteby, M. (2013). *Manufacturing morals: The values of silence and business school education*. Chicago, IL: Chicago University Press.
- Argyris, C., & Schön, D. A. (1974). *Theory in practice: Increasing professional effectiveness*. San Francisco, CA: Jossey-Bass.
- Association to Advance Collegiate Schools of Business. (2004). *Ethics education in business schools: Report of the Ethics Education Task Force to AACSB International's Board of Directors*. Retrieved from <http://www.aacsb.edu/~media/AACSB/Publications/research-reports/ethics-education.ashx>
- Bailey, J., Sass, M., Swiercz, P. M., Seal, C., & Kayes, D. C. (2005). Teaching with and through teams: Student-written, instructor-facilitated case writing and the signatory code. *Journal of Management Education, 29*, 39-59.
- Bailey, J. C. (1953). A classroom evaluation of the case method. In K. Andrews (Ed.), *The case method of teaching human relations and administration: An interim statement* (pp. 35-40). Cambridge, MA: Harvard University Press.
- Barnes, L. B., Christensen, C. R., & Hansen, A. J. (1994). *Teaching and the case method* (3rd ed.). Boston, MA: Harvard Business School Press.
- Barton, D. (2011, March). Capitalism for the long term. *Harvard Business Review*. Retrieved from <https://hbr.org/2011/03/capitalism-for-the-long-term>
- Bradshaw, D. (2017). Foreword. In D. Bradshaw (Ed.), *Rethinking business education: Fit for the future* (pp. 4-5). London, England: Chartered Association of Business Schools.
- Bridgman, T. (2010). Beyond the manager's moral dilemma: Rethinking the "ideal type" business ethics case. *Journal of Business Ethics, 94*, 311-322.
- Bridgman, T., Cummings, S., & McLaughlin, C. (2016). Re-stating the case: How revisiting the development of the case method can help us think differently about the future of the business school. *Academy of Management Learning & Education, 15*, 724-741.
- Churchman, C. W. (1967). Wicked problems. *Management Science, 14*(4), B141-B142.
- Contardo, I., & Wensley, R. (2004). The Harvard Business School story: Avoiding knowledge by being relevant. *Organization, 11*, 211-231.
- Contu, A. (2017). ". . . The point is to change it"—Yes, but in what direction and how? Intellectual activism as a way of "walking the talk" of critical work in business schools. *Organization*. Advance online publication. doi:10.1177/1350508417740589
- Copeland, M. T. (1958). *And mark an era: The story of the Harvard Business School*. Boston, MA: Little, Brown and Company.
- Cruikshank, J. L. (1987). *A delicate experiment: The Harvard Business School 1908-1945*. Boston, MA: Harvard Business School Press.
- Cunliffe, A. (2004). On becoming a critically reflexive practitioner. *Journal of Management Education, 28*, 407-426.

- Dean Donham's speech. (1932, September 21). *The Harvard Crimson*. Retrieved from <http://www.thecrimson.com/article/1932/9/21/dean-donhams-speech-pyesterday-dean-donham/>
- Donham, W. B. (1922). Essential groundwork for a broad executive theory. *Harvard Business Review*, 1(1), 1-10.
- Donham, W. B. (1931). *Business adrift*. New York, NY: McGraw-Hill.
- Donham, W. B. (1932). *Business looks at the unforeseen*. New York, NY: McGraw-Hill.
- Donham, W. B. (1949). Why experiment? The case system in college teaching of social science. *Journal of General Education*, 3, 145-156.
- Duarte, F. (2009). Rekindling the sociological imagination as a pedagogical package in management education. *Journal of Management Education*, 33, 59-76.
- Fleming, P., & Oswick, C. (2014). Educating consent? A conversation with Noam Chomsky on the university and business school education. *Organization*, 21, 568-578.
- Foster, P., & Carboni, I. (2009). Using student-centered cases in the classroom: An action inquiry approach. *Journal of Management Education*, 33, 676-698.
- Fournier, V., & Grey, C. (2000). At the critical moment: Conditions and prospects for critical management studies. *Human Relations*, 53, 7-32.
- Garvin, D. A. (2003, September-October). Making the case: Professional education for the world of practice. *Harvard Magazine*. Retrieved from <https://harvardmagazine.com/2003/09/making-the-case.html>
- Gill, T. G. (2011). *Informing with the case method: A guide to case method*. Santa Rosa, CA: Informing Science Press.
- Greenhalgh, A. M. (2007). Case method teaching as science and art: A metaphoric approach and curricular application. *Journal of Management Education*, 31, 181-194.
- Griffiths, D. E. (1963). The case method of teaching educational administration: A re-appraisal, 1963. *Journal of Educational Administration*, 1, 81-89.
- Handy, C. (2002, December). What's a business for? *Harvard Business Review*. Retrieved from <https://hbr.org/2002/12/whats-a-business-for>
- Hassard, J. (2012). Rethinking the Hawthorne Studies: The Western Electric research in its social, political and historical context. *Human Relations*, 65, 1431-1461.
- Hibbert, P. (2012). Approaching reflexivity through reflection: Issues for critical management education. *Journal of Management Education*, 37, 803-827.
- Hühn, M. P. (2014). You reap what you sow: How MBA programs undermine ethics. *Journal of Business Ethics*, 121, 527-541.
- Jackson, G. (2011). Rethinking the case method. *Journal of Management Policy and Practice*, 12, 142-164.
- Jacques, R. S. (1996). *Manufacturing the employee: Management knowledge from the 19th to 21st centuries*. London, England: Sage.

- Koris, R., Örtenblad, A., & Ojala, T. (2017). From maintaining the status quo to promoting free thinking and inquiry: Business students' perspective on the purpose of business school teaching. *Management Learning, 48*, 174-186.
- Lundberg, C. C., Rainsford, P., Shay, J. P., & Young, C. A. (2001). Case writing reconsidered. *Journal of Management Education, 25*(4), 450-463.
- McDonald, D. (2017). *The golden passport: Harvard Business School, the limits of capitalism, and the moral failure of the MBA elite*. New York, NY: HarperCollins.
- McLaughlin, C., & Deakin, S. (2012). Equality law and the limits of the "business case" for addressing gender inequalities. In J. Scott, S. Dex & A. Plagnol (Eds.), *Gendered lives: Gender inequalities in production and reproduction* (pp. 153-173). Cheltenham, England: Edward Elgar.
- Merseth, K. K. (1991). The early history of case-based instruction: Insights for teacher education today. *Journal of Teacher Education, 42*, 243-249.
- Mesny, A. (2013). Taking stock of the century-long utilization of the case method in management education. *Canadian Journal of Administrative Sciences, 30*, 56-66.
- O'Shea, J., & Madigan, C. (1997). *Dangerous company: The consulting powerhouses and the businesses they save and ruin*. London, England: Nicholas Brealey.
- Parker, S., & Parker, M. (2017). Antagonism, accommodation and agonism in Critical Management Studies: Alternative organizations as allies. *Human Relations, 70*, 1366-1387. doi:10.1177/0018726717696135
- Pettigrew, A., & Starkey, K. (2016). From the guest editors: The legitimacy and impact of business schools: Key issues and a research agenda. *Academy of Management Learning & Education, 15*, 649-664.
- Ramsey, V. J., & Dodge, L. D. (1981). Case analysis: A structured approach. *Exchange: The Organizational Behavior Teaching Journal, 6*, 27-29.
- Rappaport, A., & Cawelti, G. S. (1998). Cinematography and case videos: Some observations on selection and teaching. *Journal of Management Education, 22*, 104-112.
- Reich, R. (2008). *Supercapitalism: The transformation of business, democracy and everyday life*. New York, NY: Vintage Books.
- Rendtorff, J. D. (2015). Case studies, ethics, philosophy, and liberal learning for the management profession. *Journal of Management Education, 39*, 36-55.
- Review of *Business drift*. (1931). *Time*, pp. 45-46.
- Reynolds, M. (1997). Towards a critical management pedagogy. In J. Burgoyne & M. Reynolds (Eds.), *Management learning: Integrating perspectives in theory and practice* (pp. 312-328). London, England: Sage.
- Roethlisberger, F. J. (1954). *Training for human relations*. Boston, MA: Harvard Business School.
- Rollag, K. (2010). Teaching business cases online through discussion boards: Strategies and best practices. *Journal of Management Education, 34*, 499-526.
- Schein, E. (2004). *Organizational culture and leadership*. San Francisco, CA: Jossey-Bass.

- Sheehan, N. T., Gujarathi, M. R., Jones, J. C., & Phillips, F. (2017). Using design thinking to write and publish novel teaching cases: Tips from experienced case authors. *Journal of Management Education, 42*, 135-160. doi:10.1177/1052562917741179
- Simons, R. (2013). The business of business schools: Restoring a focus on competing to win. *Capitalism and Society, 8*(1), 2.
- Tead, O. (1953). Book review: The case method of teaching human relations and administration. *Personnel Journal, July/August*, 105-106.
- Thrift, N. (1997). The rise of soft capitalism. *Cultural values, 1*(1), 29-57.
- Turner, A. N. (1981a). The case discussion method revisited (a). *Exchange: The Organizational Behavior Teaching Journal, 6*(3), 6-8.
- Turner, A. N. (1981b). The case discussion method revisited (b). *Exchange: The Organizational Behavior Teaching Journal, 6*(4), 33-38.
- Ulrich, D. N. (1953). The case method. In K. Andrews (Ed.), *The case method of teaching human relations and administration: An interim statement* (pp. 25-34). Cambridge, MA: Harvard University Press.
- Vega, G. (2010). The undergraduate case research study model. *Journal of Management Education, 34*, 574-604.
- Watson, S., & Sutton, J. M. (2012). An examination of the effectiveness of case method teaching online: Does the technology matter? *Journal of Management Education, 36*, 802-821.
- Whitehead, A. N. (1925). *Science and the modern world*. New York, NY: Macmillan.
- Whitehead, A. N. (1931). Introduction: On foresight. In W. B. Donham (Ed.), *Business adrift* (p. xi-xxix). New York, NY: McGraw-Hill.
- Whitehead, A. N. (1933). *Adventures of ideas*. New York, NY: Macmillan.
- Whitehead, A. N. (1942). The professionalization of business. *Harvard Business School Alumni Bulletin, Summer*, 235-236.
- Wray, D. E. (1953). Review of "The Case Method of Teaching Human Relations and Administration: An Interim Statement." *American Sociological Review, 18*, 458-459.