

Case Method: Concept, Diffusion and Application at ESPM

Método do Caso: Conceito, Difusão e Aplicação na ESPM

Ed de Almeida Carlos
Raíssa Helena Paiva Apolinario
Samara de Carvalho Pedro

GIACOMINI, Gaspar. **Case method: concept, diffusion and application at ESPM** [electronic resource] / Gaspar Giacomini – São Paulo: ESPM, 2021. p. 137.

The work presents itself as a pertinent initiative raised by the author, once it enables the synthesis of the Case Method based on experiences related to the adoption and application of the method in the School of Higher Education in Advertising and Marketing (ESPM, *Escola Superior de Propaganda e Marketing*). It enables a unique undertaking applied to the pedagogical reality of our country (with emphasis on classroom performances), with active methodologies centered on the participant, environments, and procedures based on praxis. In addition, it presents technical aspects related to the institutional process of adopting the methodology. The work presents the definition and differences among other similarly named methods, essential points, and appropriate steps for the two involved parties of the method: the teacher and the student. The order and composition of the chapters adopted by the author demonstrate the essence of the Case Method, the conditions for its effective application, and essential points such as the importance of teaching-learning, interactivity, and collaborative work.

The book is divided into six chapters: the first two chapters focus on a general view of the Case Me-

Submitted: 30/11/2021
Accepted: 29/12/2021

Ed de Almeida Carlos 
edalmei@gmail.com
PhD – FIA
Mestrado – FIA
São Paulo / SP – Brazil

Raíssa Helena Paiva Apolinario 
raissah.paiva@hotmail.com
Msc – Centro Universitário FEI
Mestrado – Centro Universitário FEI
São Paulo / SP – Brazil

Samara de Carvalho Pedro 
samara.c.pedro@gmail.com
Msc – Centro Universitário FEI
Mestrado – Universidade Nove de Julho
São Paulo / SP – Brazil

thod (mainly on the definition of the method and its components) and the contextualization over the experience of applying the cases. The following chapters focus on teacher preparation, the capacitation of ESPM institution, and the importance of writing and grading in this method. The last two chapters discuss practical knowledge, in which the guidelines of the writing process based on the experience of the teachers are shown as a synthesis of good practices and innovations in its applications, such as new application formats as a form of evolution over time. In the end, the work displays a conclusive chapter of critical thinking on the discussions of the previous chapters, the competencies raised upon the debate of the cases, and the recommendation of good pedagogical practices. The book may be of interest to those who want to know more about active methodologies centered on participants, whether teachers or students, and whether for its application or not.

The book focuses on presenting guidelines on this teaching-learning method, with no intention of being a fully prescriptive manual, but to contribute to reflections and debates about real situations the student will experience outside the classroom. The book presents complex situations in which knowledge must be gathered, and a diagnosis will have to be made for the effective development of critical thinking and other skills and abilities necessary to formulate and solve problems (there is no correct answer for this exercise). It clarifies that the method has a high potential for engagement, offering a differentiated experience for both the teacher and the student due to its dynamism and ease in dealing with complex issues, emphasizing practical issues. This method breaks the tradition of the pedagogical culture of filling, in which the content and knowledge are transferred only by the teacher. It states the importance of the student for the execution of the Case Method since their engagement is essential for the method to reach its transformative potential in the classroom.

Chapter one presents an overview of the Case Method, that is, it makes clear the method is an interactive, teaching-learning approach that requires the active participation of students. It initially discusses the characteristic of stimulating debates and reflections based on inductive reasoning, from specific information to a general conclusion, to first problematize a topic and then introduce concepts that help solve the problem, thus stimulating student engagement. It also presents the history of the emergence of the method as a good form of contextualization. Another interesting point of this chapter is that the author not only discussed the method

but also showed a contrast between two other types of methods with similar names that confuse both teachers and students. He explained in a comparative table the fundamental characteristics of the three main types of case: the illustrative case (to exemplify), the research case (to create knowledge), and the teaching case (to support the debate).

Then, the work defines what the teaching case is, emphasizing the didactic property of the cases, which is a beginning for the discussion of situations that simulate the practice, but are “incomplete” since the history presents a dilemma: a challenging decision that encourages students to think about possible and diverse solutions.

By representing a decision process under a scenario of uncertainties, students are encouraged to reflect through a dramatic atmosphere, offering a gradual, non-linear learning process of individual and collective evolution.

As notable characteristics of this method, the text highlights questioning as a mechanism to instigate critical thinking of students, as well as to guide the use of analytical reasoning in the foreground of learning, followed by the gradual introduction of theoretical concepts throughout the discussion. Therefore, the ability of the teacher to link the students’ comments to theoretical-conceptual elements is essential. A high point of the text is that it presents a table with the ten main features of the Case Method as a summary for consultation. After conceptualizing the theme and its characteristics, the author indicates when to use this method pedagogically and articulates it for the use of the method in the learning processes. It is clear the responsibility of both the teacher and the student in adopting the Case Method. Prior to the classroom discussion, the student needs to know and reflect individually to efficiently participate in the group and plenary stages. On the part of the teacher, it is necessary to dedicate time to study the teaching grade and the lesson plan – in which the planning is defined with the real-time performance of the class. Complementary aspects for the success of the Case Method are the resources offered by the institution that can interfere in the dynamics of the method, such as boards to write the comments of the students and the possibility of changing the layout of the room. Therefore, despite the requirements for applying the method, it is possible to understand that by adopting the Case Method, learning becomes transformative since it engages and makes a difference in the experience of students and teachers.

The theme of Chapter 2 is practical and technical since it presents data on the application of the Case Method in the ESPM educational institution, its evolution in the database content, and its use. The institution has invested in the growing use of the method both in acquiring new international databases and in the professional training of professors with the academy on cases project (*academia dos casos*). The text presents research data that prove the consistency of the use of the method in the classroom at the institution, considering undergraduate and graduate courses. A graph demystifies the idea that “it is impossible to use this method at the undergraduate level, therefore, this method is used mostly at the graduate level”. From the data, it is possible to see that the adoption rate was practically equivalent. The chapter highlights real aspects, presenting the research on the Case Method at ESPM, in which it monitors the experience of the professors, offering significant insights into the work since gradual aspects can be observed (e.g., the use of the method by professors of ESPM, the frequency of its use, the proficiency in conducting the cases, and the greatest difficulties in using the method). Thus, these data present an overview of the adoption of the method in the institution, with real aspects guiding future plans and directions. The data also emphasize the importance of the Case Method, guide the training of professors, and can be used as an input for administrative management of institutions interested in adopting the method.

Chapter three talks specifically about “The ESPM Academies on the Case Method”, focusing on the professional training of the professor. It presents a lesson plan of the theoretical-conceptual module aimed at professors who work in postgraduate courses with a basic knowledge of the Case Method. The beginning of this plan explores the “overview” of the method as a summary of the information already exposed in chapter one. It is known that the adoption of active methodologies presents itself as challenging. Even though the chapter is technical, it presents a variety of illustrative figures of the presented concepts in a didactic way aiming at the preparation of the professor.

The innovation of this chapter is the introduction of new concepts related to the case: technical summaries aiming at the practice. The first one discusses the three types of teaching cases (Field-Based, Library Case, and ArmChair) and allows the professor to understand the crucial differences among them so that it is possible to choose the best case to use. The second new content is the descrip-

tion of the Case Triangle – a framework that characterizes three points of attention of the professor when choosing a teaching case: (1) problem-question, with the immediate question and the fundamental questions; (2) learning objectives; and (3) theories and concepts.

Another fundamental point for the professor when deciding among cases is complexity, which can be: analytical, conceptual, and presentational. It is worth mentioning that there is no specific rule to be followed, and therefore, it is up to the professor to choose the case, allowing this decision to be made based on their knowledge.

Chapter four explores the essential components of a Teaching Note, an essential item for the Case Method. Teaching notes are the “best practices” for conducting the teaching case so that the instructor can address the planned theories and discussions. It is a structured script about the case that presents the main questions, analyses, and strategies that should be brought to the discussion. It is a functional chapter that presents an example (Magazine Luiza case) with valuable information for instructors who already use the teaching case or enthusiasts who want to start using this method. It is full of information and guidelines for different situations and possible questions from students and points to be addressed throughout the case. In each discussion question, the chapter fulfills the function of showing and discussing all the steps that involve the effective use of the Case Method, from the preliminary preparation of the students to the closing of the plenary session. This chapter is very well articulated with the previous chapter, being a useful complement to training on the Case Method.

In the sequence, chapter five presents nine tips on the construction of cases and teaching notes, based on the experiences of professionals from ESPM who adopted the Case Method. In other words, a content rich in real information on preparing good teaching material. This material links concepts already presented in previous chapters, and when it needs to present the concept again, it summarizes important points. The author details a guide with reflections and guidelines for instructors and teaching case authors of the most varied levels and skills.

The last chapter explores the production of video cases, presenting the growing novelties and innovations of this methodology when dealing with the new way people expect to receive content arising from the dynamics of social media

and technologies. One of the greatest difficulties pointed out by the student for this method is the low propensity to read (preparation before class), which compromises all the progress of the development of the Case Method. Based on these information consumption patterns, the work points out different, important, and innovative references using videos as a strategy. The text discusses examples of databases that already use this innovation - "Multimedia Cases" - external or internal (examples from the ESPM institution itself), presenting its main characteristics and differences between them.

This type of innovation is interesting for classes, but it presents new challenges for the teacher. Since the dynamics of conducting the class seems to be slightly affected by the new video narrative format, it requires some adjustments in the method. Some bases use videos for previous preparation, others to be watched during the class. Therefore, the work presents itself attuned to showing an incursion into this new world of innovations of the Multimedia Case, producing debates and critical thinking on the possibilities of implementing the Method of Case. It should consider the intense transformation and the different factors, such as digital transformation (accelerated by the Coronavirus pandemic also in Higher Educational Institutions) and new ways of consuming information and technologies, but always with the teacher and student at the center of the debate.

This book supports teachers and people interested in the Case Method, with a didactic and transformative purpose. As a guide, but far beyond a prescriptive one, the book presents the teacher with clear nuances of the method, a step-by-step of training. The reading of the book is fluid, with short and technical chapters. In addition, it contains summaries that help understand the concepts presented in each item. It is worth mentioning that there is the possibility of reading the chapters separately, as specific queries for each topic, but each chapter is a complement of content and synthetically reinforces the guidelines and main concepts when you need to quote them again in the book.

Even though it was mentioned in the book, there is a lack of content focused on the perspective of the student. It is mentioned in the preface of the book that the method is focused on teaching-learning in which both the teacher and the student transmit knowledge. The book points out that the professors of the institution apply a questionnaire together with the students to document and register the perception

about the recently held debate. It would be interesting to add this perspective to the content to help the reader understand and apply the Case Method, whether student or teacher. We suggest incorporating a chapter or more information in the perspective of the student regarding the use of the method.

The limitations of the work pointed out here do not diminish the relevance and notoriety of the subject and the way it was developed. Its content is unique, as this topic will rarely be presented in such a straightforward and technical way, based on the real experiences of an institution.

We certainly encourage the reading of this book for those who want not only to have further information but to delve deeper into the Case Method and its nuances. We encourage the author to update the work in the near future since, in our view, it should be mandatory reading in courses that want to train professionals capable of teaching in an active way and with a transforming purpose.

Have a great read!