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If You Can't Beat Them Join Them – Managing the Challenges of AI to Enhance Case Teaching

A Technical Note

Dr Scott Andrews

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If You Can't Beat Them Join Them – Managing the Challenges of AI to Enhance Case Teaching

The use of AI in management education is evolving at a significant pace and there is no doubt that this has generated huge opportunities and challenges for learning and teaching. In many cases, universities and colleges have struggled to keep up with the pace of change with new policies, process and practices being adopted and adapted as greater access to AI technologies opens a Pandora's Box for students.

Perhaps not surprisingly, this has had an impact on the evolving nature of the case method in management education. In many contexts the adoption of cases for assessment purposes has been seen as an antidote to rising incidents of academic misconduct through what many institutions believe to be improper use of AI technologies to inform student assessments. On the other hand, while universities and colleges struggle to develop appropriate guidance for students, academics and educators are making greater use of AI to enhance student experiences in the case classroom, assisting in case design and construction, developing case teaching plans, and providing in-class tutor support for case participants.

The case method was introduced to management education more than 100 years ago and ever since it has been constantly adapting and evolving. Case teaching has been widely adopted by universities and colleges across the world and at all levels of learning. In my 25 years of working with the case method as an educator and learning facilitator I have experienced significant changes. Including its adaptation for undergraduate teaching and learning, for online learning, as well as changes in the types and formatting of cases from its original text and paper-based context to new forms of digital media cases. However, I am reasonably confident that this 'technical note' will soon be superseded by new practices as the pace of change through AI continues to increase.

One thing for sure, in this otherwise ever-changing context, is that AI is here to stay, and so we need to be confident about how to use such technologies and how to guide our students as they seek to engage with AI.

This technical note begins by exploring how AI can be adopted by educators to support case writing albeit with a cautionary message to avoid over-reliance on technology without due regard for some of the key theories, principles and practices of effective case writing. Every well-constructed case study is little more than a carefully crafted story without a well-developed teaching plan (or teaching note) to enable the tutor to facilitate a journey through the case data for classroom discussion. The next part of this note considers the role that AI plays in enhancing the construction of the teaching note. AI can also be used to support the development of visual cues and digital media that might accompany a carefully crafted narrative to enhance the classroom experience, as well as providing in-class tutoring support and translation functions (which are of particular value for international students).

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Case assessments are increasing in popularity and AI can provide functional support for assignment questions as well as some low-level support for grading. Finally, this note explores the need to develop an ethical framework for students to ensure they can manage the complexities of working with AI and confidently avoid trip-hazards.

Developing your own case

I wanted to personally explore the challenges of engaging AI in the case writing process and an opportunity arose when a colleague asked for assistance to develop a case for his PR class on a global brand which was struggling with a catalogue of highly publicised incidents of malpractice. This company had experienced extreme product failure with whistle-blowers providing damaging testimony to undermine the brand's long-established, world-leading reputation.

Given the level of information in the public arena, it seemed an ideal fit for a case supported by AI. In the first instance I registered onto a Generative AI (GenAi) platform and entered the following command: *What problems are ABC Company facing in 2000 words.* Within seconds I had a carefully constructed report with sub-headed sections that provided very generalised comments related to the company and its industry. These descriptive statements lacked any specific detail of the most recent product failures and whistleblower reports, but did provide some interesting generalisations and, to my surprise, a suitable working title for my case study.

I then entered my second command: *What whistleblowers are saying about ABC Company and how the authorities are responding in 2000 words.* This time the response began with the statement: *'As of my last update in January 2022, ABC Company has faced...'* This made clear to me that most recent reported data was missing and would therefore not inform the outputs that this platform was able to generate. I made one further attempt as I cited a major product failure from January 2024, to which the response was: *'It's possible that this event occurred after my last update in January 2022, and I don't have access to real-time information.'*

I then explored other versions of GenAi that were available with more up-to-date access to real-time and current market information. At the same time I gathered a broad range of different articles that were available in the public domain that showcased many of the most recent failures of the company and I collated all these articles into one very large file.

Then I added the following command: *Turn the following text into a 2000 word case study entitled: Can ABC Company Recover its World-Leading Reputation? Using the following text....* [and I added the text from the very large file of articles I had previously generated]. This time the GenAi platform provided me with a very comprehensive case study report which included an introduction, a conclusion and sections of data under seven other subheadings.

At this point I paused to reflect on the basic principles of case writing to which I had adhered for more than 20 years. Former Harvard professor, English literature major and case scholar, Professor Malcolm McNair frequently commented that the purpose of the management case study was to

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foster interest with students and to create a *willing suspension of disbelief*. He went on to suggest that to achieve this four basic case structures needed to be explored (McNair, 1971; Heath 2015):

1. The narrative structure – the telling of a story to encapsulate the reader.
2. The time structure – the historical sequence of events.
3. The expository structure – the disclosing, unearthing and communication of information to provide opportunities for discovery.
4. The plot structure - the clash of people and ideas which provides the elements of drama within a case, typically concerning the actions and motivations of the “actors” in the case situation.

A further review of traditional Harvard and Ivey principles for case writing reminded me of the value of bringing cases alive with real actors, reported speech and elements of suspense, with the caveat that the case writer should carefully leave out of the case their own opinions and evaluation, which were to be saved for the teaching note (Ellet, 2018; Mauffette-Leenders, Erskine and Leenders, 2007; Schmenner, 2002). Clearly my GenAi case study had failed to observe many of these time-honoured approaches in favour of a more descriptive report.

This GenAi case report certainly contained some elements of these four structures but there were still many components missing that demonstrated to me that a reasonable degree of finessing would be needed if this product was to serve the expected purpose of a case study for classroom discussion.

A number of further modifications were needed which included:

- Amending the tense – to ensure consistency throughout the case narrative.
- Introducing a new case opener, to provide an element of drama, urgency and suspense.
- Removing/editing content to further develop the expository structure
- Re-introducing real stakeholders by name
- Introducing quotations from reports related to some stakeholders
- Reframing the case report to provide three chronological, sequential cases: Case A, Case B and Case C, to enable some data to be temporarily withheld and to allow students to form their own unbiased judgements.

GenAi was able to accommodate some of these requests through detailed commands to revise the existing case report, but most of these actions needed to be completed independent of GenAi. I was also mindful at this stage that I could make further use of GenAi to allow the case to be redeveloped in alternative languages, to suit the needs of a wider international student group.

Developing the teaching note

The teaching plan (or teaching note) is an essential part of the case construction process forming a map that the tutor can use to navigate a student journey through the case data. I have always maintained that the core content of the teaching note or case map should be constructed in parallel

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to the development of the case study. I've often found that as my case is in mid-construction, new ideas are formed about how this could be used in the classroom, which need to be captured during the case writing process to inform the development of the teaching note. This enables the case author to provide a unique insight into the case situation and a very personalised approach to classroom delivery. This can be a time-consuming labour of love, but it does normally ensure that the final product is a highly customised learning tool which can be very effective for classroom learning.

By contrast, on this occasion I took my now finalised version of the *ABC Company* case study and added the pretext command: *In 2000 words produce a teaching plan for the following case study.....* Within ten seconds my teaching note was produced, complete with a synopsis of the case, its purpose, learning objectives and key themes, a teaching approach and session structure (with timed sections), opportunities for student presentations, group discussion, role play and reflection. There was a case analysis section with discussion points and case questions covering five themes, assignment suggestions and overall evaluations.

While recognising that this was far from my personally customised learning tool, I was also aware that it had saved me several hours of hard labour and would require only a modest degree of finessing to ensure it met with all my intended expectations for class delivery. The temptation is to leave it exclusively to GenAI to save the author significant time and pressure by generating the teaching plan. But I remain convinced that a critical reflective eye to modify the final GenAI version and customise it to the author's intended personal expectations will pay dividends.

Designing visual and auditory content

So far, these explorations have focused on the written word but there is no doubting that AI can take this text and enhance it through a range of visual and auditory approaches. AI platforms have developed the capability to receive instruction and to generate new visual imagery to reflect an impression of the context in which the case situation is set. Similarly, text related to reported speech can be enhanced by generating sound bites or digital avatars that provide a multi-media experience for the student.

"Recent technological breakthroughs now allow the creation of AI-based educational avatars. LLMs or other generative AI models drive these avatars, which embody a human, can act in a shared virtual world with the user, and follow educational prompts." (Fink, Robinson and Ertl, 2024)

But remember such adaptations need to be subject to approvals where they seek to reflect the spoken word of real stakeholders within a case situation. The peril of overindulging the student with digital media-enhanced resources is that it may risk violations of privacy, misinformation and potential harmful bias.

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Case Tutorial support

One interesting example of how students are taking responsibility into their own hands by accessing the tutoring capability of GenAi is showcased by an undergraduate student from Austin, Texas. She spoke with Harvard Business Publishing editors about her engagement with GenAi, stating: *'I'm able to create my own GPT with ChatGPT Plus or ChatGPT Pro that's trained on class slides, practice exams, and other materials from my teacher. Because this custom GPT can draw directly from these materials when answering prompts, I use it as a personalized tutor, asking it to explain course concepts or quiz me with practice problems. It's really great because it can be tailored to any class.'* (HBP 2024). She continued to explain that *'in a regular classroom, a teacher can rarely give individualized attention to every student. With generative AI, every student has a personal tutor in their pocket.'*

It could be argued that the institutional challenges presented by this should ensure all students have fair and open access to GenAi resources and that, where possible, AI is built into the institution's operating models (Neeley, 2023).

The use of in-class AI tutoring support can also include real-time translation functions that ensure international students can keep up with the pace of a case discussion without cumbersome delays to allow for interpretation of key terms and phrases.

Developing assignment material

As one article from AACSB points out: *'Artificial intelligence enables educators to prepare exam questions, assignments, and model essay responses in minutes, freeing up our time and energy to help students refine their analyses and recommendations.'* (Berry, 2024)

As with all assignments in management education, the first challenge for a case study assignment is to be clear about what is being assessed. The case method has been recognised for its capacity to address a number of what might be referred to as *employability skills* including:

- Problem identification and analysis
- Problem solving
- Looking at situations from multiple perspectives
- Handling assumptions
- Decision making
- Evidence based judgements between different courses of action
- Relating theory to practice

Assessment planning should take account of how these skills might be deployed and evaluated through engagement with the case method (Andrews, 2021). Besides seeking reports that offer descriptions, explanations and predictions, the case method enables students to demonstrate awareness, depth and breadth of knowledge, the ability to identify and draw from relevant data, perceptions, judgment skills and creativity in formulating recommendations for action. (Heath, 2015)

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One thing for sure, the case method has been trumped as a potential antidote to AI-related concerns about behaviour leading to academic misconduct. The argument suggests that the case method enables educators to **customise a student experience** in an immersive experiential learning context, with hand-crafted questions that can then be used to drive a very specific journey through case data, for the purpose of an assessment while ensuring students are still drawing from all their individual and personally developed management skills and practices, to address a management challenge, which may be enhanced and facilitated with AI technologies. Better still, rather than simply assessing a written reflective report, let's be brave and consider how we can better integrate live in-class (whether virtual or physical) assessment techniques that appraise the students real-time ability to respond to a management situation through in-class contributions, small group work, role play and presentations – the type of stuff that provides a genuine and authentic assessment **for** learning rather than just an assessment of learning.

Developing an ethical framework for student engagement with AI

In May 2023, Harvard Business Review produced an article entitled *8 Questions About Using AI Responsibly, Answered*, (Neeley, 2023). By 30th June 2023 the numbers seem to have risen with Harvard publishing *13 Principles for Using AI Responsibly*, (Spisak, Rosenberg and Beilby, 2023). Even within my own institution, ethical guidance for engaging with AI has been re-written several times over the past couple of years. Neeley affirms that “*the power of AI introduced by OpenAI, Microsoft, and Nvidia — and the pressure to compete in the market — make it inevitable that your organization will have to navigate the operational and ethical considerations of machine learning, large language models (LLM's), and much more.*” On the matter of LLM's, she points out that there are some serious risks when engaging with LLM's including:

- **perpetuate harmful bias** by deploying negative stereotypes or minimizing minority viewpoints
- **spread misinformation** by repeating falsehoods or making up facts and citations
- **violate privacy** by using data without people's consent

More recently Harvard's Faculty lounge released an article exploring: *How Students Are Actually Using Generative AI*, (HBP, 2024). HBP Editors brought together five US based students to explore how they are navigating the challenges of AI. One Masters graduate commented: “*I think the greatest weakness of generative AI is that it is not yet regulated and not yet well understood. There are so many ways that students can use generative AI unethically.*”

As a Board Member for my local Chamber of Commerce, I interact with business leaders across a range of sectors on a regular basis through which I have become very aware that all sectors are regularly engaging with AI in their business practices. So, if we as educators and academics are to be supporting future employability for our students then providing an appropriate context for them to develop their digital skills using AI technologies has become an important responsibility for us. But as with the evolution of all new technologies, they are prone to abuse and misuse and so it is incumbent upon us to ensure that our students are able to safely engage with AI technologies within

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a clearly defined ethical framework. Cutting to the quick, if we as educators are using AI to speed-up and sometimes even short-cut some of the otherwise cumbersome processes of developing and refining the narrative styles of our teaching resources then why shouldn't we be expecting our students to adopt similar practices. The challenge therefore is not so much how we penalise for misuse of AI, but rather how we ensure appropriate engagement with AI to enhance students' capacity for learning and development, rather than simply providing a shortcut for assignment writing.

As one tech entrepreneur who sits on my Business School's Board of Advisors recently stated, AI highlights a need for a paradigm shift in how we think about learning and assessment. He suggested that the sector is less interested today in graduates that can answer questions correctly and more interested in **recruiting graduates who know how to ask the right questions**. If this is the case, then we need to be thinking about how we are developing such skills and capabilities in our students, through a framework that is enabling rather than artificially restrictive.

Perhaps rather than seeking to restrict or even penalise engagement with AI in assessments, we need to be thinking about revising our assessments to enable our students to showcase how they confidently engage with AI, what functions AI and related technologies can play in their responses to real business situations, and how they then critique such crafted artefacts to ensure they are fit for purpose to address the management challenges raised in their assignment.

However, we must accept that with or without our permission, students are going to engage with AI, and so it is essential that our institutions have a well-informed set of ethical guidelines and frameworks and that these have been clearly articulated to our students. Harvard editors asked a group of US students what advice they would give to educators about engaging with AI, to which one commented:

"It's not just that AI is here to stay; AI will only get better. Structure your courses accordingly—not by banning generative AI, but by embracing it." (HBP, 2024)

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