



Because Wisdom Can't be Told

So he had grown rich at last, and thought to transmit to his only son all the cut-and-dried experience which he himself had purchased at the price of his lost illusions; a noble last illusion of age.

Balzac

The essential fact which makes the case system ... an educational method of the greatest power is that it arouses the interest of the student by making him an active rather than a passive participant.

Dean Donham

Students must be accepted as the important part of the academic picture. This article about the case system of instruction of the Harvard Graduate School of Business Administration is concerned therefore with the effects that the case system has upon students. The object is not to describe the cases themselves, the methods of their collection, or even the routine of their classroom use. For the benefit of those unfamiliar with business school cases, it is merely necessary to explain that, as now used, a case typically is a record of a business situation that *actually* has been faced by business executives, together with surrounding facts, opinions, and prejudices upon which executive decisions had to depend. These real and particularized cases are presented to students for considered analysis, open discussion, and final decision as to the type of action that should be taken. Day by day the number of atomic business situations thus brought before the students grows and forms a backlog for observing coherent patterns and drawing out general principles.

It can be said flatly that the mere act of listening to wise statements and sound advice does little for anyone. In the process of learning, the learner's dynamic cooperation is required. Such cooperation from students does not arise automatically, however. It has to be provided for and continually encouraged.

Thus, the key to an understanding of the Harvard Business School case plan of teaching is to be found in the fact that this plan dignifies and dramatizes student life by opening the way for students to make positive contributions to thought and, by so doing, to prepare themselves for action. Indeed, independent, constructive thinking on the part of students is essential to the sound operation of the plan. This result is achieved in two ways.

In the first place, students are provided with materials which make it possible for them to think purposefully. They are not given general theories or hypotheses to criticize. Rather, they are given the specific facts, the raw materials, out of which decisions have to be reached in life and from

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which they can realistically and usefully draw conclusions. This opportunity for students to make significant contributions is enhanced by the very nature of business management. Business management is not a technical but a human matter. It turns upon an understanding of how people—producers, bankers, investors, sellers, consumers—will respond to specific business actions, and the behavior of such groups always is changing, rapidly or slowly. Students, being people, and also being in the very stream of sociological trends, are in a particularly good position to anticipate and interpret popular reactions.

In the second place, the desired result of student participation is achieved by the opening of free channels of communication between students and students, and between students and teachers. The confidence the student can be given under the case system that he can, and is expected to, make contributions to the understanding of the group is a powerful encouragement to effort. The corollary fact that all members of the group are in the same situation provides the student with exercise in receiving as well as in giving out ideas. In short, true intercommunication is established.

In these facts lies the answer to the unique values of the case system, and from these facts also arise certain difficulties encountered in its use. It is not easy for students to accept the challenge of responsible activity in the face of realistic situations. Nor is it always easy for teachers to preserve the needed openmindedness toward their students' contribution. Nevertheless, the very existence of the assumption, implicit in the case system, that students are in a position to and will exert themselves to think with a lively independence toward a useful end in itself provides a real stimulus. By the same token, the stage is so set as to simplify the teacher's task of encouraging students to participate actively in the process of learning. The students are given the raw materials and are expected to use them. The teacher, for his part, has every opportunity and reason to demonstrate an encouraging receptivity as well as to inform and guide.

Thinking out original answers to new problems or giving new interpretations to old problems is assumed in much undergraduate instruction to be an adult function and, as such, one properly denied to students. The task of the student commonly is taken to be one chiefly of familiarizing himself with accepted thoughts and accepted techniques, these to be actively used at some later time. The instruction period, in other words, often is regarded both by students and teachers as a time for absorption.

Thus many students entering graduate schools have become habituated to the role of the receiver. The time inevitably arrives, however, when young people must engage in practical action on their own responsibility. Students at professional schools have a little time—at the Harvard Graduate School of Business, two years—to achieve the transition from what may be described as a childlike dependence on parents and teachers to a state of what may be called dependable self-reliance.

If the hearts of the students entering a graduate school of business administration could be clearly read, it is likely there would be found in many a cherished hope that upon graduation they would find positions of authority and power awaiting them. This is a carefully guarded hope, because for some reason there is a general feeling that it is an unseemly one for anyone to harbor. Yet, although the students who possess this hope may be said to be unrealistic under conditions as they exist, they cannot be said to be other than logical. For if a person is to occupy a humble position in the business hierarchy more or less permanently, he can make better use of two years of his time than spending it at a school of business administration. The apprentice system is open in a fuller way to the person who wishes to enter business than it is to the person who seeks to work in the field of law or of medicine, for example. Except in a few instances, such as the plumbing and electrical trades, there are no restrictions on who can start in business, whereas budding doctors and lawyers must study for and pass their respective medical or bar exams first. And, if those who are to spend their lives as salespeople, floorwalkers, clerks, or minor officials have several years to devote to acquiring background, they are likely to find that study of sonnets, or operas, or fishing, or philosophy will be more sustaining to the soul than a broad knowledge of business operations.

The work of a graduate school of business consequently must be aimed at fitting students for administrative positions of importance. The qualities needed by business people in such positions are: the ability to see vividly the potential meanings and relationships of facts, both those facts having to do with persons and those having to do with things; capacity to make sound judgments on the basis of these perceptions; and skill in communicating their judgments to others so as to produce the desired results in the field of action. Business education, then, must be directed to developing in students these qualities of understanding, judgment, and communication leading to action.

Furthermore, since those who contemplate entering a graduate business school customarily have an alternative opportunity to enter business immediately, the business school must be able to do more for its students than could be accomplished in a corresponding period of actual business experience. Formal professional education necessarily postpones the time of responsible action. Yet a principal object of professional education is to accelerate the student's ability to act in mature fashion under conditions of responsibility. One who completes a professional course is expected to demonstrate a more mature judgment, or to demonstrate mature judgment at an earlier period, than the person who enters upon a career of action without benefit of formal training. The presumption in this situation obviously must be that it is possible to arrange programs of training in such a way as to do more than offset the effect of prolonging the student's period of ostensible immaturity.

It would be easy to accept the unanalyzed assumption that, by passing on to young people of intelligence the accumulated experience and wisdom of those who have made business their study, the desired results could be achieved. Surely if more or less carefully selected young people were to begin their business careers with the advantage of having been provided with information and general principles in lectures and readings that it has taken others a lifetime to acquire and develop, they might be expected to have a decided head start over their less informed contemporaries.

This assumption, however, rests on another decidedly questionable one; namely, the assumption that it is possible by a simple process of telling to pass on knowledge in a useful form. This is a stumbling block of the ages. If the learning process is to be effective, something dynamic must take place in the learner. The truth of this statement becomes more and more apparent as the learner approaches the inevitable time when he or she must go into action.

We are all familiar with the popular belief that it is possible to learn how to act wisely only by experience—in the school of hard knocks. But everyone knows that, from a practical point of view, strict adherence to the literal meaning of this belief would have a decidedly limiting effect upon the extent of our learning. Time is all against it. So we all try to tell others what we know or what we think we know. A great part of our educational system, perhaps necessarily, rests on this basis. It is the simple, obvious way of passing the torch of culture from hand to hand.

Entirely aside from the seemingly sound logic of this course, there exists a natural and strong tendency for people to tell others what is what—how to think, or feel, or act. Often this tendency seems, to the one having it, like an urge to duty. A friend of ours, for example, may remark that he is worried because he doesn't seem to be getting anywhere with the president of the company. "He doesn't seem to know I'm around," our friend explains. Ah ha! We know the answer to that one and will tell our friend how to solve his problem. "Look here, old boy, the trouble with you is you are too shy. Just speak up, loudly and firmly. Tell him what's what. The old buzzard won't ignore you then!"

It is possible that our desire to pass on our knowledge springs in part from the fact that such activity places us, for the time being, in the superior position. From our earliest beginnings there have been people around to tell *us* what to do, to pass on to us their experience and wisdom. There is no little gratification in turning the tables. For a while we will be the parents and someone else can be the child. It is only necessary to listen to a six-year-old lecturing a three-year-old to see vividly the strength of this pleasure.

Teachers, since it is their avowed objective to extend the knowledge boundaries of others, are particularly beset by the temptation to tell what they know—to point out right paths of thought and action. The areas in which their help is called for are ones they have penetrated many times. They have reflected, presumably, upon their subjects from all angles. They feel that they know the answers and, with unselfish abandon, they are willing to tell all. Their students thus will be saved all the time and effort it would have taken them to work things out for themselves, even granting they ever could work out such excellent answers.

Yet no amount of information, whether of theory or fact, in itself improves insight and judgment or increases ability to act wisely under conditions of responsibility. The same statistical tables covering all aspects of a business may be available to every officer of the organization. Nevertheless, it does not follow that it makes no difference to the business which officer makes the decisions. Likewise, the whole body of generally accepted business theory may be equally familiar to all executives, yet the decisions reached by the various individuals are unlikely to be the same or to have equal merit.

We cannot effectively use the insight and knowledge of others; it must be our own knowledge and insight that we use. If our friend, acting solely on our advice, undertakes to tell the president what is what, the chances are he will make himself conspicuous but not impressive. For him to use our words effectively, granting our diagnosis of the situation is sound, they must become his own through a process of active thought and feeling on his part. Then, if he agrees with us, he will be able to act as we suggest, not on our advice, but from his own heart. The outstanding virtue of the case system is that it is suited to inspiring activity, under realistic conditions, on the part of the students; it takes them out of the role of passive absorbers and makes them partners in the joint processes of learning and of furthering learning.

The case plan of instruction may be described as democratic in distinction to the telling method, which is in effect dictatorial or patriarchal. With the case method, all members of the academic group, teacher *and* students, are in possession of the same basic materials in the light of which analyses are to be made and decisions arrived at. Each, therefore, has an identical opportunity to make a contribution to the body of principles governing business practice and policy. Business is not, at least not yet, an exact science. There is no single, demonstrably right answer to a business problem. For the student or business person it cannot be a matter of peeking in the back of a book to see if he has arrived at the right solution. In every business situation, there is always a reasonable possibility that the best answer has not yet been found—even by teachers.

Exercise of mature judgment obviously is inconsistent with a program of blindly carrying out someone else's instructions. Moreover, no matter how worthy those instructions may be, they cannot cover every exigency. Tommy's mother says: "On your way home from school never cross the street until the policeman tells you to and, when he does tell you to, run." Perhaps one day no policeman is there. Is Tommy to wait forever? Or, perhaps a driver fails to observe the policeman's signals. Is Tommy to dash under the speeding wheels?

So far as responsible activity in the business world is concerned, it is clear that a fund of readymade answers can be of little avail. Each situation is a new situation, requiring imaginative understanding as a prelude to sound judgment and action. The following sad limerick, aimed at describing what might happen to business students without benefit of cases, has been contributed by a friend who prefers to remain anonymous.

A student of business with tact
Absorbed many answers he lacked.
But acquiring a job,
He said with a sob,
"How *does* one fit answer to fact?"

A significant aspect of democracy in the classroom is that it provides a new axis for personal relationships. No longer is the situation that of the teacher on the one hand and a body of students on the other. The focus of the students' attention is transferred from the teacher to each other, their contemporaries. It is not a question of dealing more or less *en masse* with an elder; it is a question of dealing with a rather large number of equals whose criticisms must be faced and whose contributions need to be comprehended and used. Everyone is on a par and everyone is in competition. The basis is provided for strong give and take both inside and outside the classroom. The valuable art of exchanging ideas with the object of building up some mutually satisfactory and superior notion is cultivated. Such an exchange stimulates thought, provides a lesson in how to learn from others, and also gives experience in effective transmission of one's own ideas.

Under the case system, the instructor's role is to assign the cases for discussion, to act as a responsible member of the group delegated to provoke argumentative thinking, and to guide discussion by his own contributions and questions toward points of major importance; and, if he chooses, to take a final position on the viewpoints which have been threshed out before him. The more powerful are the student arguments, the heavier is the burden on the instructor; he must understand and evaluate each contribution, many of which are new to him, regardless of how thoroughly he has studied the cases or how many times he has used them with previous classes. To the instructor, every class meeting is a new problem and a new opportunity both to learn and to help others to learn. The important question under these circumstances is not whether students' answers please the instructor, but whether they can support their views against the counter-attacks and disagreements of others in the group, or, failing to do so, can accept cooperatively the merits of their antagonists' reasoning.

For both teachers and students, the disciplines of the case method of learning are severe. Sometimes the shock is devastating to students who previously have been dominated by patriarchal representatives and thus have been faced merely with the relatively simple task of more or less verbatim reception and repetition of facts and ideas. Not all students can bear the strain of thinking actively, of making independent judgments which may be challenged vigorously by their contemporaries. Many people will always prefer to have answers handed to them. Teachers, for their part, particularly those unused to the system, sometimes find it straining to leave the safe haven of dogmatism and meet their students on a democratic plane. The inherently dramatic and challenging character of the case system, however, although producing anxiety and confusion for the newcomer, also arouses his deep interest and leads him to make the effort required for adjustment.

In making the adjustment to the democratic disciplines of the case system, students typically pass through at least three objectively discernible phases. The first phase is that of discovering the inability of the individual to think of everything that his fellow students can think of. In many instances, to be sure, the challenge to original thought is pleasing from the first. Yet perhaps more often confusion and a feeling of helplessness set in: "But it's so discouraging to prepare a case as well as I can and then listen for an hour in class to other students bringing out all sorts of interpretations and arguments that I had never thought of."

The second phase is that of accepting easily and without fear the need for cooperative help. During the last half of the first year and the first half of the second year, students learn to draw more and more fully upon each other's ideas in the working out of problems. Competition for high academic standing grows more keen, to be sure, but the mutual giving and taking of assistance ceases to be a matter of secret anguish. The students are making common cause and thereby learning the pleasure of group pooling of intellectual efforts.

The third and final phase in the march toward maturity usually comes well into the second year with the recognition that the instructors do not always or necessarily know the "best" answers and, even when they do seem to know them, that each student is free to present and hold to his own views. When this phase is reached, students are ready to make independent progress and to break new ground on their own account. They are operating as responsible members of the community,

taking help, to be sure, from both contemporaries and elders, but making their own decisions without fear of disapproval or search for an authoritative crutch to lean upon.

This sequence of student development is not peculiar to the use of business cases. Other schools using the case system apparently have a similar experience so far as initial confusion among students is concerned. For instance, Dr. Redlich,¹ professor of law at the University of Vienna, investigated the case system of teaching law for the Carnegie Foundation and reported, in part, as follows:

I am just as positive that, if all first attempts are difficult, this is especially true of legal education according to the case method. Eminent professors of law have repeatedly explained to me that it takes a long time before the excellent effects of instruction by law cases are evident. The beginners are, as a rule, rather confused by what is demanded of them in class, and usually for a considerable period only the particularly quick or talented students take part in the debate; but after some weeks or months, things become clearer to the others also . . . and there soon follows the hearty cooperation of the majority.²

An outstanding effect of the case system, in other words, is to put upon students the burden of independent thinking. The initial impact of such mental activity upon a mind not used to it has been described by Chekhov in the words of one of his characters in the story "Lights":

It appeared that I . . . had not mastered the technique of thinking, and that I was no more capable of managing my own brain than mending a watch. . . .

For the first time in my life I was really thinking eagerly and intensely, and that seemed to me so monstrous that I said to myself, "I am going off my head."

No method is foolproof. A badly handled case system cannot but be an academic horror. Improperly handled, a case is merely an elaborate means for confusing and boring students. If, moreover, the teacher insists on being a patriarch—with the only right answers—and if the teacher visualizes his or her task as one of forcing the students, the case facts, and his or her answers into an affectionate rapport—it will be found that the out-and-out lecture system is infinitely less costly and less straining to everyone concerned. Such use of cases perverts the unique characteristics of the system. The opportunity that this system provides the students, of reaching responsible judgments on the basis of an original analysis of the facts, is sacrificed.

In addition to the possibility that the case system will be misused, and so become merely a wasteful way of telling the students what the teacher thinks, it must be recognized that the case does not provide a perfect replica of a business situation. In the properly conducted class using business cases, the students are put in the position of the executives who must arrive at definite conclusions to be followed by specific actions whose merits will be tested by resulting developments. There is no escaping the fact that the students' decisions are not tested in this way. As Winston Churchill is reported to have remarked recently, there is a great deal of difference between being responsible for an order which may lose several valuable ships and expressing an opinion without such responsibility. It is too much to expect that anything except experience can be exactly like experience.

¹Josef Redlich, J.U.D. (Univ. Of Vienna) '91, Lecturer on Government, 1908–09; Godkin Lecturer, 1910–11; Professor of Comparative Public Law, 1926–29; Charles Stebbins Fairchild Professor of Comparative Public Law, 1929–35.

²Quoted by C. F. Allen, in "The Case System for the Study of Law," from *Proceedings of the Society for the Promotion of Engineering Education*, Vol. 27, 1919, p. 55.

Nevertheless, a training period that allows students this relative irresponsibility has great advantages. Serious students get the essential background for responsible decisions without the risks to themselves and to their industry that stem from amateurish action. They are led to active consideration of a tremendous number of diverse and related real situations, which it would take them at least a lifetime of experience to encounter, and they are thus given a basis for comparison and analysis when they enter upon their careers of business action.

The case system, properly used, initiates students into the ways of independent thought and responsible judgment. It faces them with situations which are not hypothetical but real. It places them in the active role, open to criticism from all sides. It puts the burden of understanding and judgment upon them. It provides them the occasion to deal constructively with their contemporaries and their elders. And, at least in the area of business, it gives them the stimulating opportunity to make contributions to learning. In short, students, if they wish, can act as adult members of a democratic community.

As for the teachers, the case method of instruction richly provides them with the basic means of research. Not only does the existence of a stream of recorded business experiences enable them to keep in touch with business life and to make continuous necessary modifications in their inductions and general conclusions, but in addition, the relations which the case system sets up between teacher and students give the teacher the continual benefit of fresh, imaginative points of view which always hold the possibility of true advance.