

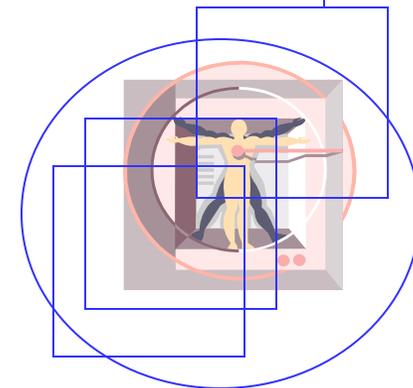
# TEACHING CASES IN HR

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# Why Use Cases?

## Principles of Adult Learning

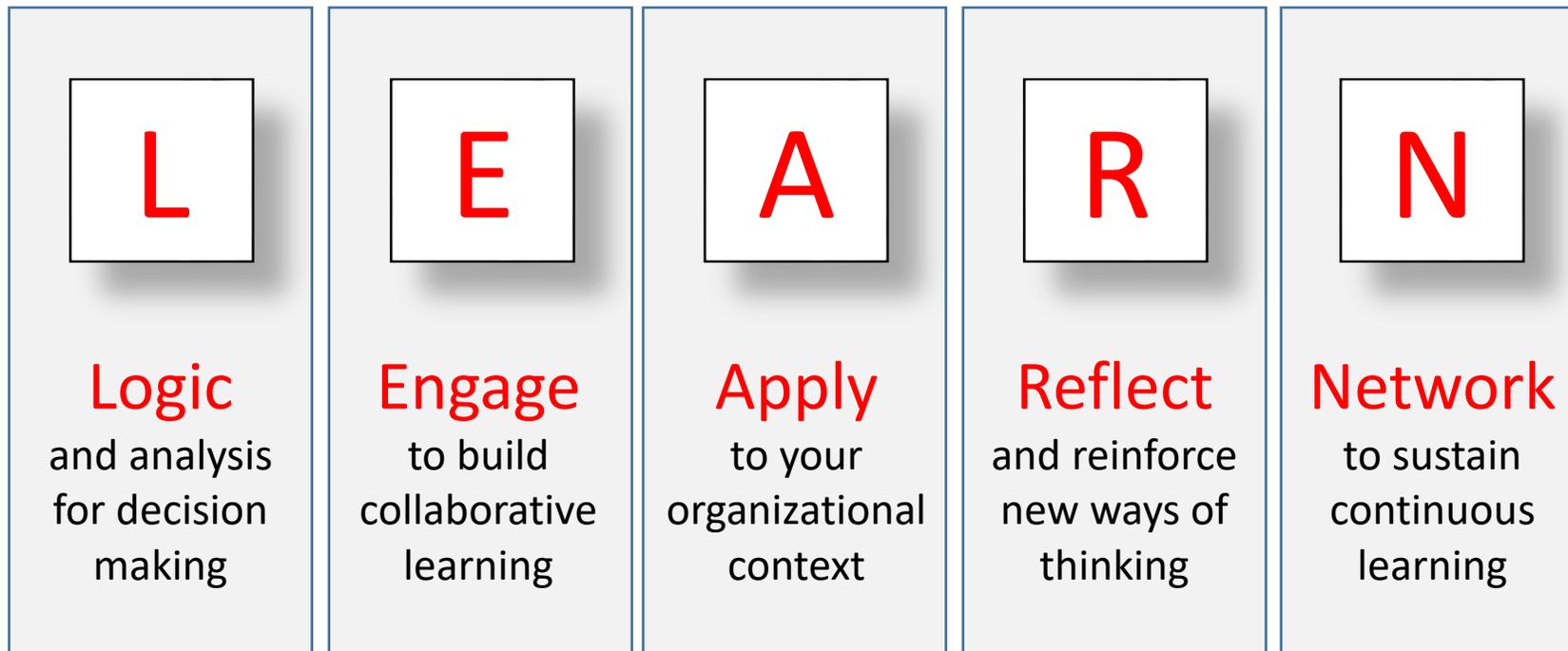
- Self-directed
- Problem-focused (not theory)
- Collaborative (learn from each other interactively)
- Change framing (new ways of looking at issues)

→ Socratic Method



# Course Design: Expectations

- [Why...?]
- How do you incorporate cases into the design of your courses?
- What expectations do you set for your students
- What kinds of assessments and grading procedures do you use?



# Case Studies on Strategic HR



HARVARD | BUSINESS | SCHOOL

9-304-049

REV: NOVEMBER 3, 2006

CHRISTOPHER A. BARTLETT  
ANDREW N. MCLEAN

## GE's Talent Machine: The Making of a CEO

For more than a century, General Electric (GE) had been recognized as one of the world's leading diversified businesses, and regularly found itself at or near the top of America's and the world's most admired corporations. From its founding in 1878 by Thomas Edison, the company grew to be a titan in the world of electrical generation, distribution, and use—and a widely followed model of modern management practice. GE was a pioneer of centralized corporate control in the 1930s, an exemplar of the decentralized multidivisional organization form in the 1950s, a leader in strategic planning in the 1970s, and a model of the lean and agile global competitor of the 1990s.

Throughout its history, GE always promoted its top leaders from its own ranks. The company's much admired executive development practices were rooted in the cultural values put in place by Charles Coffin, the CEO who succeeded Edison in 1892. Over the next 20 years, Coffin's commitment to creating a meritocracy based on measured performance became the foundation for a culture that was to make GE "a CEO factory" as one observer called it.<sup>1</sup> Throughout the 20<sup>th</sup> century, this machine produced a pool of skilled managers that not only met the company's own needs, but also became a major source of CEO talent for corporate America. So powerfully enduring was Coffin's accomplishment that a 2003 *Fortune Magazine* article named him "the greatest CEO of all time."<sup>2</sup>

On September 7, 2001, when 44-year-old Jeff Immelt was named the company's twelfth leader after Edison, he faced a daunting challenge. Not only would he be leading a \$130 billion global company managing businesses from lighting to aircraft engines to financial services, but he would do so following Jack Welch, a legendary CEO who, over two decades, had generated an average annual total return to shareholders of more than 23%. (See **Exhibit 1** for selected financial data.)

As Immelt took on one of the biggest management jobs in the world, some wondered whether GE's vaunted management development process had prepared him to lead such a complex organization. But for the new CEO, the bigger question was, how could he ensure that GE's talent machine kept developing executives who could continue driving the company's superior performance?

### Building the Talent Machine: History of GE's HR Practices

Building on the foundation laid by Coffin, GE's human resource (HR) policies and practices underwent significant development and change in the last half of the 20<sup>th</sup> century. Four successive CEOs each made the development of management talent a high priority, and in doing so, made GE's human resource management processes among the most sophisticated in the world.

Professor Christopher A. Bartlett and Research Associate Andrew N. McLean prepared this case. The helpful input of Jim Ettamara, MBA Class of 2003, is gratefully acknowledged. HBS cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

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9-409-039

REV: JULY 7, 2011

BORIS GROYSBERG  
DAVID A. THOMAS  
ALISON BERKLEY WAGONFELD

## Keeping Google "Googley"

Kim Scott, director of Google's AdSense online sales and operations, had just returned from one of Google's quarterly meetings in 2008 and her mind was racing. The company was continuing to launch new products and services at a rapid pace, and it was hard to keep up with the innovation happening around her on a daily basis. Scott had started at Google during the summer of 2004. At the time the company had approximately 3,000 employees, and most were based at the company's headquarters in Mountain View, California. In just four years, Google's employee count had grown to over 17,000, and more than 40% were based outside of the U.S. Revenue growth was on an even faster trajectory, with \$3.2 billion annual revenues in 2004 growing to a \$20 billion run rate for 2008.

Scott had pursued a variety of entrepreneurial roles since she graduated from Harvard Business School in 1996, and she joined Google because she was attracted to the innovative culture and the can-do attitude of everyone she met. She was hired to help plan and manage the growth of Google AdSense ("AdSense"), one of Google's two major advertising services. Scott shared the business leadership with her functional counterparts in product management and engineering. Nearly all important decisions were made together as a leadership team. She explained, "Google is a fast-moving, consensus-based organization. I thought those were mutually exclusive qualities before I got here."

When Scott started at the company in 2004, she wondered if she would still be there in several years, because she had never been at the same company for more than three years in the past. Yet, now it was the middle of 2008, and she was pleased that Google still had the same entrepreneurial atmosphere it had when she started. Founders Sergey Brin and Larry Page and CEO Eric Schmidt established a culture that rewarded innovation and continuous improvement, and all job applicants were screened for "Googley" qualities that would enable them to thrive in such an environment. Some observers assumed that the increased size would inevitably lead to more bureaucracy, but Scott was pleased that employees throughout the company worked hard to keep the potential negative by-products of rapid growth to a minimum. As Scott walked past some young employees chatting in the courtyard, she reflected on what enabled Google to maintain its culture as the company kept doubling in size. She hoped she would still love working at Google in another four years and asked herself, "What else can we do to ensure that Google remains the same kind of entrepreneurial place that excited me in 2004?"

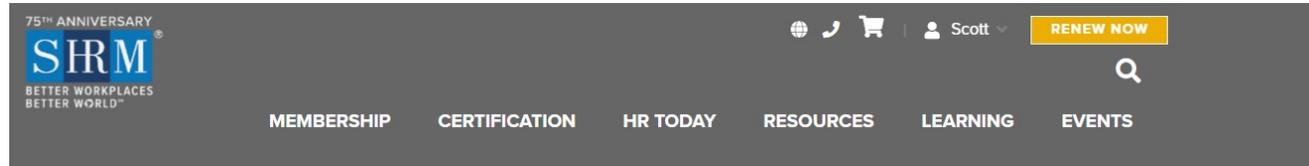
Professors Boris Groysberg and David A. Thomas and Alison Berkley Wagonfeld, Executive Director of the MBS California Research Center, prepared this case. MBS cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

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- Plan questions
- Business first...
- Principles not practice
- System solution



# SHRM Case Study Collection



<https://www.shrm.org/certification/educators/pages/teaching-resources.aspx>



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SHRM-SCP**

Chief Knowledge Officer  
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| CERTIFICATION     |   |
|-------------------|---|
| DECIDE            | ▼ |
| GET CERTIFIED     | ▼ |
| PREPARE           | ▼ |
| RECERTIFY         | ▼ |
| FOR EDUCATORS     | ▲ |
| FOR ORGANIZATIONS | ▼ |

## How to Use These Resources in Your Classroom

**Case studies** take an in-depth look at a specific topic or challenge faced by an organization. Case studies include instructor resources as well as a corresponding student workbook.

**Learning modules** are provided as a resource for HR faculty to supplement a current teaching plan, to add a new HR content topic to an existing course, or to create a new course. A learning module includes PowerPoint slides, teaching notes, syllabus, recommended readings and instructor's manual. In some instances, the learning module includes accompanying case studies, exercises, progress checks and quizzes. While each learning module is designed to be complete and ready-to-use, we anticipate instructors will invest preparation time in order to customize the module to his or her own teaching style.



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# How I use cases when I teach HR & Staffing

**Dr. Beth A Livingston**

June 2, 2023

# My first HR class

- Spring 2008 (4<sup>th</sup> year of grad school)
- HR + Diversity applied to HR
- Assignments + Cases

## Grading:

1. Cases/Homework: 150 points (30%)
  - a. Includes brief case analyses & [assignments](#)
  - b. Between 2-4 pages each
  - c. See grading rubric at end of [syllabus](#)
  - d. Each is worth 15 points (10 total)
2. Participation: 100 points (20%)
  - a. Contributions to discussions (quality and quantity)
  - b. Attendance
  - c. Pop quizzes (5 of them—lowest quiz will be dropped)
  - d. Respectfulness towards classmates and instructor
  - e. Participation in in-class group assignments/cases
  - f. Earn around 3 points per class period (more on quiz days)
  - g. This is not a “gimme”!
3. Individual Project: 150 points (30%)
  - a. Individual Diversity Experience Response
    - i. Instructions included at end of [syllabus](#)
    - ii. Proposed experience must be submitted by **Feb 21st**
    - iii. Final paper due by **April 29<sup>th</sup>** at **5pm** via ELearning
4. Group Project 100 points (20%)
  - a. Group Human Resources Analysis
    - i. Instructions on ELearning website
    - ii. Group presentations begin **April 15, 2007**
    - iii. Select groups by **Feb 21<sup>st</sup>**
    - iv. PPT slides due **April 14** by **11:59pm** via [ELearning](#)

# My first “cases”

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→ Cañas, K. A. & Sondak, H. (2008). Opportunities and challenges of workplace diversity.

**Case 2: Texaco A and B**

**Case 5: Cracker Barrel**

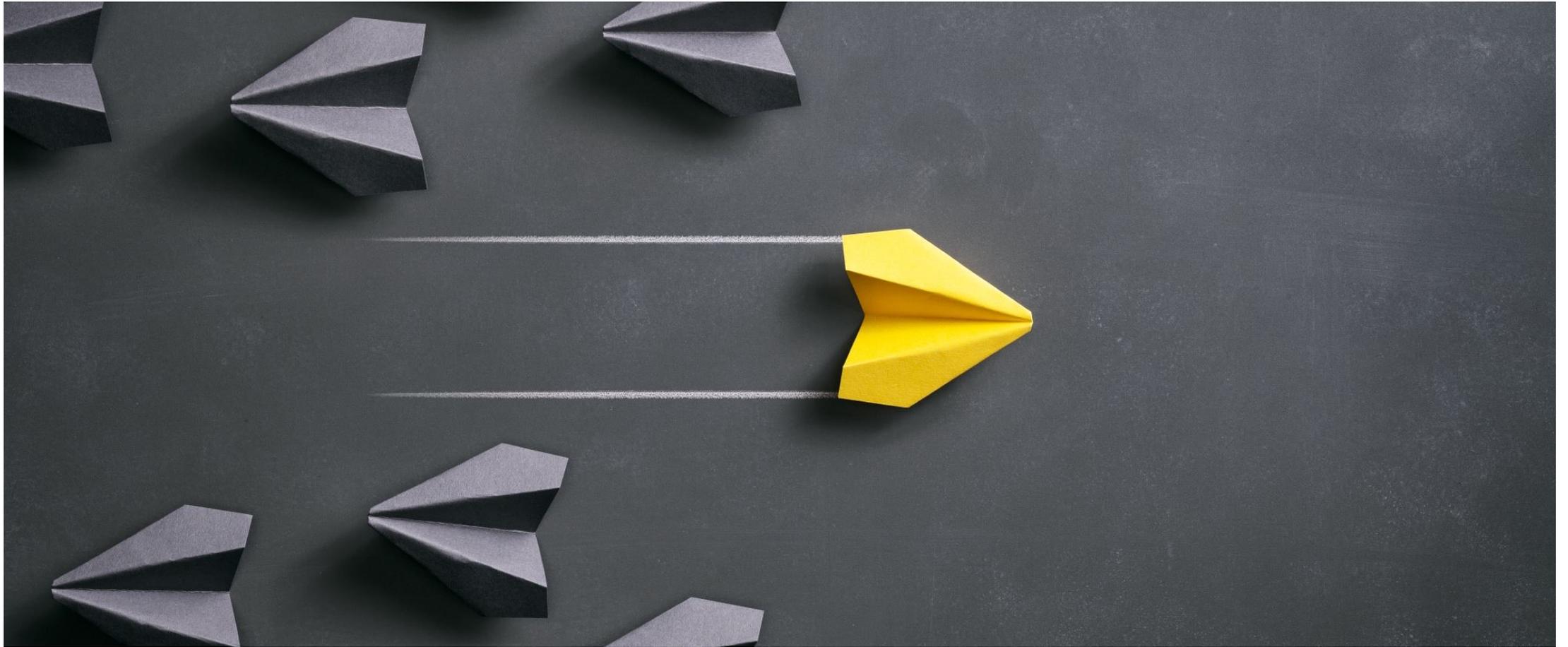
**Case 6: Eye of the Perfect Storm**

# What did I learn?

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- Books with cases make it easy to start
- Clear learning goals make it easy to teach
- Comprehensive rubrics make it easy to grade

**Consider flipping the classroom, even a little!**



# Cases should serve your learning goals.



# Cases can be complex or simple.

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# Practice asking good questions.



# Sample cases I use (MBA class)

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- [A Day in the Life of Alex Sander: Driving in the Fast Lane at Landon Care Products](#)
  - How do you deal with a recalcitrant “star”?
- [Mabel's Labels: Leading in a Results-Only Work Environment](#)
  - How do you maintain a strong culture with a ROWE approach?
- Role Play: [Confronting a Necessary Evil: The Firing of Alex Robins \(A\)](#)
  - How do you fire someone?

# Sample cases I use (undergrad)

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- “Tanglewood case” (accompanying “Staffing Organizations” book, written by John Kammeyer-Mueller)
  - From staffing strategy to data analysis to selection decision making
- Treadway Tire Company: Job Dissatisfaction and High Turnover at the Lima Plant
  - Satisfaction --> Turnover

**IOWA**

BethALivingston.com

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**Thanks!**

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# Teaching Cases in HR

**Sebastian Reiche, IESE Business School**  
*[sreiche@iese.edu](mailto:sreiche@iese.edu) – [blog.iese.edu/expatriatus/](http://blog.iese.edu/expatriatus/)*

## My own case teaching journey

- Postgraduate teaching context
  - Degree programs vs. Executive Education
- Case method is main instructional approach
  - 60-70% of sessions are typically case based
  - Foundational lectures and exercises complement cases
- Training on case teaching and regular teaching groups
- Most courses follow a general management perspective
  - HR taught to a managerial audience, *not* to HR specialists
- Student expectations:
  - Case as primary reading *BEFORE* class
- Grading approach:
  - Class participation – case as vehicle to stimulate learning
  - Team assignments: HR analysis of a start-up/scale-up company

# What makes for a rich case

1. Challenges of finding a real gem
2. Fungibility/versatility: case lends itself across audiences and courses
3. A decision problem that splits the class
4. Attractive setting



# Classic HR cases that I use



Harvard Business School

9-300-004

Rev. January 8, 2001

## Microsoft's Vega Project: Developing People and Products

In March 1998, Jim Kaplan, product unit manager for Microsoft Group, was deep in thought as he left one of his regular meetings: 5-year Microsoft veteran. MacLellan had spent the past three development of an innovative interactive learning system design and retention. Kaplan felt a great deal of pride in the project experience I've had as a manager—"not only because the product even more important, because he'd been able to coach and develop

Now, however, his young protégé had just told him that management role and wanted to concentrate on writing software Engineer (SDE), as they were more formally designated. Walkir sort through the questions and concerns racing through his mind support such a radical career shift when Matt had five years of experience but had never worked as a professional software developer manage such a move, not only to Matt's satisfaction but also in particular concern was the performance level he could justify for his deep knowledge of the company's products, technologies applied software development experience would make it hard to current compensation package. It was an issue Kaplan realized hard.



Harvard Business School

## Bain & Company, Inc.: Making

*We'd like to think promotions are only fact-based, but both fact-based and judgmental.*

*Partnership promotion is a make-or-break decision for us.*

—Tom Tierney,  
Bain Worldwide Managing Director

In June 1998 Bain's Compensation and Promotion Committee (CPC) met at a beachside resort in Hawaii to review nine candidates for elevation to the rank of vice president, the consulting firm's equivalent of partner.<sup>1</sup> Committee chairman Phyllis Yale, a 16-year Bain veteran and partner in the Boston office, knew that for Bain the stakes were high: partnership was a long-term commitment. Having served on the committee for nearly three years, she realized that its decisions not only had an impact on the strength of the firm's 175-member worldwide partnership, but also sent a powerful signal to Bain's consultants and managers. Maintaining a pool of top quality seasoned consultants was crucial to Bain, which held a leadership position in management consulting, a rapidly evolving industry with revenue growth of nearly 18% per annum and annual turnover of about 15%.



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9-496-023

REV. SEPTEMBER 30, 2021

JAY W. LORSCH  
JOHN J. GABARRO

## Cambridge Consulting Group: Bob Anderson

As the 737 circled and climbed eastward out of Los Angeles International Airport, Bob Anderson began to unwind from the grueling 48 hours in Los Angeles. As managing partner of the Technology Group of the Cambridge Consulting Group (CCG), he had spent two long days defining a consulting project for a rapidly growing biotech company. Now, while some of the junior members of his team were doing preliminary data gathering, he was flying back to Boston to meet with another client.

Since the seat next to him was empty, Bob was left to his own thoughts as he settled into the 6-hour flight. His thoughts quickly turned to CCG and the Technology Group. He began to reflect on how he had performed during his second year as group head. Despite the great year his group had, he began to wonder how well he was doing in managing them for the future. Were they positioned to handle the intensifying competition, and was he developing younger staff for the changes the organization would require given the rapidly growing number of clients?

# Benefits of using your own cases

## American Express: Deciding on a Hybrid Work Model After the COVID-19 Crisis (A)

John Almandoz  
Sebastian Reiche  
Larisa Tatge

In the fall of 2021—after leading his team through 18 turbulent months pandemic—Juan Orti, CEO of American Express (Amex) in Spain, and his cour (CET) had to address what the new way of working would look like for their t a companywide discussion about what the “new normal” would look like . faced with determining to what extent Amex Spain employees should ad arrangements. Their conclusions, along with those from other Amex country an important role in formulating the final company-wide policy.

Since the onset of the health crisis, Amex Spain’s colleagues had been worki home—amazingly so, Juan felt. Both productivity and profitability at Ame However, among Amex managers, there was concern that the company’s could erode, and operations could be affected if a certain level of in-pers maintained. Outside the company, the pros and cons of different work arra effects on morale, performance, and innovation were being widely debated and academics alike.

## Towards the Top End by Being Down Under: Haier's Acquisition of Fisher & Paykel Appliances

B. Sebastian Reiche  
Yih-teen Lee  
Carlos Sánchez-Runde

Harry Hou was sitting at one of the many round tables in the spacious Grand Harbour Restaurant in downtown Auckland, New Zealand. In his role as director and owner of the Oceania microenterprise<sup>4</sup> for Haier Group, a leading multinational consumer electronics and home appliances company headquartered in Qingdao, he was contemplating the future of the group’s acquisition of Fisher & Paykel Appliances (FPA). A delegation of Haier representatives, with whom he had spent the day discussing collaborations between Haier and FPA, had just left, allowing him a few moments to reflect on the past and future journey.

## Myer and Flanagan (A): High-Stake Recruitment at the Top

In the late spring of 2014, the Australian department store Myer was going through a major reshuffle of its senior management team. More than 20 senior managers had left the company over the previous two years, and the exodus of some key members of the executive team was thought to have accelerated after CEO Bernie Brookes decided in its position, cancelling his previous plans to hand over the reins several of Myer’s senior executives with the potential to be the asingly difficult to identify promotion opportunities. At the same in the retail sector meant that several opportunities were arising the industry.<sup>1</sup>

veral senior managers from Myer, many roles needed to be filled.

DPO-420-E  
Rev. 4/2019

*Available through IESE Publishing*

## Example case on R&S

- Setting: High-stake recruitment at the top – hiring a *chief strategy officer* for an Australian department store
- Hiring process together with Executive Search firm and Board involvement
- Written based on publicly available information
- Useful setting to combine case teaching with lecturing: effective selection methods and their limitations, especially regarding the recruitment interview



### Myer and Flanagan (A): High-Stake Recruitment at the Top

In the late spring of 2014, the Australian department store Myer was going through a major reshuffle of its senior management team. More than 20 senior managers had left the company over the previous two years, and the exodus of some key members of the executive team was continuing. The turnover was thought to have accelerated after CEO Bernie Brookes decided in February 2014 to remain in his position, cancelling his previous plans to hand over the reins of the company. As a result, several of Myer's senior executives with the potential to be the next CEO were finding it increasingly difficult to identify promotion opportunities. At the same time, challenging conditions in the retail sector meant that several opportunities were arising for experienced executives in the industry.<sup>1</sup>

DPO-352-E  
May 2015

## What you need to teach cases effectively

- Find your own style!
- Preparation is key – but when is it not...?
  - The right questions to tease out the most meaningful debate
  - Breadth: what possible issues may come up in the discussion?
  - Depth: background content, side points, related concepts, etc.
- Your role as an agile facilitator
  - Be attentive and listen well!
  - You need to build the storyline!
  - You manage the engagement levels
  - Be ready to improvise 😊
- Think Case Method+: Complement with other methods (mini-lecture, buzz groups, roleplays, simulations, debates, workshops)

## How to overcome typical challenges in (HR) case teaching

- The HR system I would like to develop on the board doesn't emerge from the discussion!
- Never teach a case until you have taught it 10 times 😊
- Help, no one has read the case!
- OMG, students were given the B case!
- There are still 30 minutes remaining, and I am done already!

Thank you!

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