



## Direct Bearing Network Resource

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### Contact Information

Publisher

Direct Bearing Incorporated

7466 River Road, RR1

Palmer Rapids, ON

K0J 2E0 Canada

Email: [publisher@directbearing.ca](mailto:publisher@directbearing.ca)

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### The Direct Bearing Network



The Direct Bearing Network represents a group of people responsible for risk management in their organizations.

Members gain access to risk management related articles, studies, tools, templates and links to quality resources that have been vetted by the Direct Bearing Team.

The Network also serves to put you in touch with other people working in similar areas with challenges not unlike your own.

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## THE CASE EXERCISE PROCESS

A case is:

...a description of an actual situation, commonly involving a decision, a challenge, an opportunity, a problem or an issue faced by a person...the case allows you to step figuratively into the position of a particular decision maker. (Erskine, Leenders, Mauffette-Leenders, 2001, p. 2)

Case exercises are ideal for building judgment and decision making skills from an adventure leadership perspective because it allows the students to analyze, debate and decide a variety of problems as though they were actually there, without the risk of a poor decision causing harm. In effect, it helps build experience.

Case exercises test an individual's ability to *analyze* a situation – sort through details to pinpoint a problem and separate that from contributing or complicating factors. It practices *decision making skills* and contributes towards building *judgment*. Finally, it *applies theory*, and is an opportunity to put class notes and ideas to work.

A case exercise is a process and learning opportunity. The case story is purposely vague, offering only enough detail to get you started. The correct decision is rarely obvious, and in many cases several different solutions could work, provided they are implemented wisely. The point of case learning is to *develop* skills, not find the right answer.

### THE CASE PROCESS – 3 STEPS

#### STEP 1: Individual Analysis

Read the case exercise individually. Take time to think about the problem presented - the attached *Case X Worksheet* is designed to help you methodically analyze the story.

Fill this out as your work, and don't be afraid to revise your earlier ideas. Point form is sufficient.

#### STEP 2: Group Discussion

Bring your completed *Case X Worksheet* to the group meeting. All members of your group will sign off on your sheet, as proof that you arrived to the meeting prepared. This signed worksheet will be handed in with your group report.

This is where the real learning takes place – in the group discussion. All members share their ideas and evaluate the different options. The more in-depth the discussion, the more learning you will gain from any one case. A superficial 'get it done' attitude does nothing to build your analytical, decision making or judgment skills – in fact it likely reinforces your 'novice like' decision making (bad!).

#### STEP 3: Case summary

After your group has thoroughly discussed the issues, causes, options and solution, the information must be written up and submitted for grading. As this is a *process* oriented exercise, your write up needs to explain how you came to your decisions – which is much more important than the decision itself. In particular, how you ranked your 'immediate issues', your 'cause analysis', 'decision criteria' and 'alternative assessment' all need to be explained in detail. Your 'implementation' plan should be thorough. One summary will be submitted for the group. See the attached marking rubric for assistance in the summary.

#### References:

Erskine, J., Leenders, M., Mauffette-Leenders, L. (2001). *Learning with Cases*, 2<sup>nd</sup> ed. London, Ont.: Ivey Publishing.

# CASE X WORKSHEET

Case Title: \_\_\_\_\_

## A: ISSUES

### Immediate

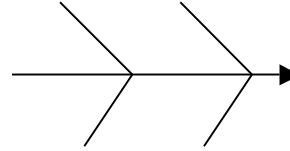
- 1.
- 2.
- 3.
- 4.
- 5.

### Underlying

- 1.
- 2.
- 3.
- 4.
- 5.

Issue Rating Scale:		IMPORTANCE	
		HIGH	LOW
URGENCY	HIGH	I	II
	LOW	III	IV

## B: CAUSE ANALYSIS



## C: PROBLEM DEFINITION?

## D: POSSIBLE ALTERNATIVES

- 1.
- 2.
- 3.

## E: DECISION CRITERIA

- 1.
- 2.
- 3.

## E: ALTERNATIVE ASSESSMENT

Pro / Con	Crit 1	Crit 2	Crit 3	Accept / Reject
Alternative #1				
Alternative #2				
Alternative #3				

## G: PREFERRED ALTERNATIVE

## H: IMPLEMENTATION

Who  
What  
Where  
When  
How

Predicted outcome:

- Best
- Likely
- Worst

Missing information:

Assumptions:

Student name: \_\_\_\_\_ Group sign off: \_\_\_\_\_

CASE RUBRIC	20-40%	60%	80%	100%	MARK / 100
Problem definition	Fails to clearly define any problem	Identifies issues or factors but infers underlying problem	Clearly defined problem; lacks connection to key concept	Clearly defines problem that shows insight and understanding of environment, group or self	/ 10
Issues and urgency	Dwells on missing info.; mismatched issues to problem	Reports info.; deals with problem and issues on a concrete level	Extends info.	Shows conceptualization and interpretation of problem; extends info. given	/ 20
Cause analysis	Lacks insight and understanding of issues related to problem	Factual interpretation of scenario or reiterates issues	Considers issues as a whole and synthesizes problem cause	Shows conceptualization and interpretation of cause; extends info. given; applies theory; shows understanding of relations among factors	/ 20
Possible alternatives	Misses obvious solutions or does not address problem; shows lack of effort	Suggests obvious solutions; factual interpretation of info.; addresses problem	Extends info.; addresses problem and issues	Shows insight and creativity; addresses problem and issues; extends and interprets info. given	/ 10
Evaluation of alternatives / Decision criteria	Fails to connect criteria and alternatives in any meaningful way; ignores problem resolution; omits or contradicts info. given; ignores implications; does not apply theory	Connects criteria to alternatives in superficial manner; does not focus on problem resolution; limited to info. given	Shows understanding of implications of solutions; solves problem; extends info. given	Shows conceptualization of relationship between criteria and alternatives; extends info. given; focuses on problem resolution; shows understanding of implications of solutions; applies theory	/ 20
Recommendation / implementation	Recommendation does not address problem; ignores issues and factors; implications ignored	Recommendation addresses base problem but not all issues; makes leaps in logic or overlooks underlying assumptions; implications not addressed	Addresses problem and issues; solid implementation; leaves minimal factors unsolved	Shows understanding of implications; recognizes assumptions underlying decision; relates all factors to problem resolution; shows commitment to recommendation	/ 10
Professional presentation	Minimal acceptable – several errors in spelling or grammar; poor layout	Minor errors in grammar or layout	No errors	Flawless, highly professional; impressive submission	/ 10

Group: \_\_\_\_\_