**RETHINKING THE ROLE OF THEORY IN CRITICAL CASE WRITING AND TEACHING**

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**Abstract**

The case method of teaching management education is celebrating its centenary but while it has survived, it has not thrived. Case writing and teaching techniques have been refined to a high level of sophistication, but there has been little substantive innovation. Despite its continued popularity, the case method is out of step with today’s turbulent environment. In the classic Harvard Business School approach, the narrow focus on training students to solve business problems has become problematic in a world where business schools are expected to produce graduates with a deeper understanding of the ethics of business, social responsibility and sustainability. To address this deficit, we argue for a reconceptualization of the case method’s relationship with theory. At Harvard this has taken two forms throughout its history– a hostility to any inclusion of theory in case analysis, and an approach which uses theory as an instrument for profit maximisation. We propose a third form, inspired by a re-examination of Harvard’s response to the turbulence of the 1930s and illustrate this by drawing on cases that we have written and taught with.

**Keywords:** case method; theory; business schools; management history; Harvard Business School.

**Introduction**

In the last decade we have witnessed a global crisis second only to the economic depression of the 1930s. Whilst the initial shock passed quickly, the crisis triggered a series of events including sovereign debt worries, money printing on an unprecedented scale, austerity budgets and record low interest rates, which have led to housing bubbles and rapid growth in wealth inequality. More recently we have experienced the rise of populist political candidates who offer voters an illusion that they can end this turbulence.

The question guiding this special issue is ‘as educators, what should we be doing, and helping future managers learn how to do, to deal with turbulent times’? Our response, as management education scholars interested in history, is that we should learn from the past, since turbulence is not unique to our times. Clearly, some lessons have been learnt from the global financial crisis and its aftermath. The 1930s experience educated macroeconomists that government intervention in the financial system and stimulatory policies can help limit contagion, restore confidence and allow the private sector time to recover.

But what lessons have we, the community of management educators, learnt? Whilst not wanting to absolve business schools from their responsibilities, it is difficult for management educators to learn the lessons of the past, because of the histories available to us. A belief in management prerogative, private enterprise and a limited role for the state has underpinned the field of management studies since its inception, with the result that opinions and events inconsistent with this narrative are often either misrepresented in histories of our field, or omitted completely. This limits our ability to learn from the past, especially from those periods of upheaval that mirror, in important respects, what we face today.

This essay investigates the case method of teaching, the most dominant mode of management education throughout the past century. It originates from Harvard Business School (HBS) and is inseparable from the HBS brand, being the cornerstone of its lucrative MBA and executive education programmes and providing a significant revenue stream through sales of cases to business schools around the world. As a learning approach, the case method remains under-theorised (Burgoyne & Mumford, 2001) and there has been little substantive innovation. Nearly 100 years ago Wallace Donham, shortly after assuming the deanship, described in a memorandum to faculty his vision of the school as “giving the student training for practice in dealing with business problems” (1920, in Copeland, 1958, p.77). Fast forward nearly 100 years and not much seems to have changed. The case method develops judgement, defined as the ability to make tough, business decisions in a highly competitive global market (Anteby, 2013, Simons, 2013). For its advocates, this problem solving focus is the key to its longevity and success. However, for others, Harvard’s case method represents everything wrong with business education. Business schools, particularly HBS, are accused of breeding managers who sacrifice ethics and responsibility in the pursuit of profit (Currie, Knights, & Starkey, 2010; Ghoshal, 2005; McDonald, 2017; Starkey, 2015). There has been much debate and a little action. Business ethics and corporate social responsibility have more emphasis in the curriculum and the Principles of Responsible Management Education movement has gained momentum. From our vantage point, however, it is now largely ‘business-schooling as usual’. Whilst new modes of delivery such as simulations and experiential learning now supplement the case method, they are refinements of the same approach – training students to solve business problems. This provision of “a profit-maximization toolkit” (Koris, Ortenblad, & Ojala, 2017, p.174) is out of step with what students and other stakeholders rightfully expect and risks undermining the legitimacy of business schools (Bridgman, Cummings, & McLaughlin, 2016).

We believe that for substantial innovation of the case method to occur, there has to be a reappraisal of the role of theory. We are not the first to have suggested this (Jackson, 2011; Greenhalgh, 2015; Rendtorff, 2015), but our contribution is novel for looking at HBS for inspiration, since it is assumed their case method is “not interested in theory” (Rendtoff, 2015, p.40). As we illustrate in the next section, two views about the place of theory in case analysis have competed throughout its past – in one theory has no role and in the other it is used as an instrument for profit maximisation. Both are problematic, reinforcing the critics’ view of the HBS case method as amoral, instrumental and managerial and essentially a lost cause for those committed to a critical management education which aims to challenge this status quo (Fournier & Grey, 2000). Our historical research, however, revealed a past that is absent from most histories of HBS (Copeland, 1958) and the case method (Garvin, 2003; Grandon Gill, 2011; Merseth, 1991; Mesny, 2013). In the 1920s and 1930s, in response to social and economic crisis, there was vigorous debate about the need for a theoretically-informed examination of capitalism and the ethical and social responsibilities of managers, as well as hope that the case method could deliver this. By recovering this past that HBS seems keen to forget, we hope to stimulate debate on what the case method could be, and to provide legitimacy to alternative forms of case writing and teaching that hitherto have been regarded as inferior to the ‘gold standard’ of the Harvard method.

**Exploring the case method’s relationship with theory**

The catalyst for our research into the case method’s past was our experiences as case writers and teachers. We began writing cases, rather than purchase them from case libraries or use the ones in textbooks, because there were few cases from our geographic location and we wanted students to study management in context. Our cases were based on high profile organizations and often involved controversy. They were not just about management, but also employees, customers, unions, not-for-profit organizations and government. We wanted our students to understand management from multiple perspectives, so theory was always important in analysing them – including often-used organizational behaviour and strategy concepts, but we also drew from the fields of ethics, employment relations, anthropology, political science and sociology. These lenses generated radically different understandings of management and organizations and often challenged students’ preconceived notions of what the study of management was about.

Our early cases were well received, so we attended case writing and teaching workshops to further develop our skills. At one, which we were told was based on the classic Harvard approach, case analysis took place in a theoretical vacuum. Topic areas such as strategy, human resource management, and organizational behaviour were mentioned, but the ‘lessons learnt’ were generated from an analysis of the case without explicit reference to any concept, theory, framework or model. In comparison, the teaching techniques were highly sophisticated. We learnt about the crucial importance of the opening question for drawing students into analysis of the case and the need for careful consideration of follow-up questions to probe various aspects. We learnt how to develop a whiteboard plan – which was effectively pictures of how the instructor’s whiteboard would look at the end of the session. This was the art of case teaching – working with the contributions of the class and shaping them so that all the analysis and insights from the case were teased out.

Having received instruction on an approach very different to our own practice in the classroom, and puzzled about the place of theory in the case method, we decided to delve deeper into its development at HBS. While expecting continuity, we found instead a genuine contest of ideas about the form it could, and should take. Recovering these debates, we feel, offers a means of reformulating the case method to be a better fit with the needs of management education today.

Donham was the central figure in this debate. A graduate of Harvard Law School, he believed its case-based approach would be ideally suited for what he saw as the mission of the business school – delivering a practical training in solving business problems. Students would learn how to determine the relevant facts of each case, generate a series of options for resolving the problem, and then, crucially, deliver their judgment in the form of action (Copeland, 1958).

Donham encouraged his students to read widely in the social sciences, but he did not want them to apply theory (in the form of principles, concepts, or frameworks) to cases. Partly this was due to the state of business administration theory in 1920. Research was dominated by economists and there was little study of the business executive’s perspective. In the main, however, it was Donham’s distaste for the lecture method, which he saw as stultifying the enthusiasm of students and preventing them from taking responsibility for their own learning (Donham, 1949). If asked to apply theory to cases, “the majority responds to each case problem according to some stereotyped approach” (Ulrich, 1953, p.25-6). This was appropriate for a liberal arts college, but not for a business school (Bailey, 1953).

It would be misleading to suggest, however, that Donham was anti-theory. Paradoxically, he believed in the case method as a means of generating theory, as had been the case in law, with general principles derived from the study of individual cases. The first article in the first ever issue of *Harvard Business Review* detailed his plans for developing “a broad executive theory” (1922, p.1); “business needs not less theory, but much more” (p.2).

Donham’s conception of the case method was not universally shared. The views of Ulrich and Bailey above were included in *The Case Method of Teaching Human Relations and Administration: An Interim Statement* (1953), a collection of papers, edited by Kenneth Andrews, by those who taught and researched human relations at HBS. One reviewer was “alarmed at the anti-scientific and anti-intellectual connotations” of focusing the case discussions on how individuals should act (Wray, 1953, p.459). This “exercise in amateur psychoanalysis” is “actually encouraged by staff emphasis on the uniqueness of each case situation and the deliberate discouragement of the use of principles or generalizations for analytical purposes” (p.458).

Wray’s was not a lone voice. By this time, Donham’s ‘permissive’ approach was being supplanted by a ‘structured’ approach that gave theory a more prominent role (Griffiths, 1963). In contrast to the dearth of human relations theory in 1920, by the 1950s the field was flourishing, leading Griffiths to conclude “there is no longer any reason why a person should say he does not have any theory or concepts with which to handle administrative situations” (1963, p.85). Advocates of the structured approached agreed with Donham that business education should be a practical training in solving business problems (in the analogy of Barnes Christensen, and Hansen (1994), HBS knew it wanted to train carpenters rather than to create wood theorists), but they wanted to use the tools that this science of management was producing (Roethlisberger, 1954). Donham remained unconvinced, reflecting at the end of his career that “the case system as it has grown under constant trial and error has little or no place for the use of cases by the instructor to illustrate his theories” (1949, p.147).

The structured approach was given further momentum by changes in the professional advice industry. During Donham’s tenure, firms such as McKinsey & Co hired experienced, mid-career managers. Following McKinsey’s death in 1937 Marvin Bower, also a graduate of HBS, took control of the struggling firm and in a radical shift, set about hiring fresh business school graduates with a sharp intellect, enthusiasm and an entrepreneurial mindset. Their job would involve creating and selling management ideas – specialist tools that could solve corporate problems – and Bower’s close ties with HBS gave him access to the school’s top graduates, the Baker Scholars. The structured approach to the case method was a perfect fit in this new environment (O’Shea & Madigan, 1997; Schleier, 2000).

**Recovering the case method’s forgotten past**

So far, our historical survey has shown that while the history of HBS’ case method is celebrated for its continuity, there were different ideas about its relationship to theory. However, neither the permissive nor the structured approach resemble the way we have worked with theory in our own case teaching. Is not there more to studying management than solving business problems? And surely theory can have a use beyond being a tool to deliver maximum profits?

There is another interesting but largely untold story about the case method at HBS, which can inspire a rejuvenated role for theory. Donham was greatly influenced by Alfred North Whitehead, a faculty member of Harvard’s Philosophy Department between 1924 and 1937 (Cruikshank, 1987). Whitehead is recognised for providing the intellectual foundation for the case method’s action orientation (Barnes Christensen, & Hansen, 1994). Whitehead saw it as a mistake to distinguish between institutions which pursued abstract knowledge and those concerned with its application and wished for the university to be a place where “purposeful activity, intellectual activity, and the immediate sense of worth-while achievement, [is] conjoined in a unity of experience” (1933, p.444). Whitehead took an interest in Donham because HBS and its case method illustrated perfectly his argument.

Not mentioned in most historical accounts of Whitehead’s ties with HBS is his views on the developing crisis in the United States. In *Science and the Modern World* (1925), Whitehead described the dangers to democratic societies caused by rapid change combined with an increasing specialization of knowledge, which “produces minds in a groove” (p.275). What is needed is “to strengthen habits of concrete appreciation of the individual facts in their full interplay of emergent values”, rather than the traditional approach studying abstract ideas divorced of values. This was particularly pressing in the era of scientific materialism, the ascent of free market economics and of greed, where an obsession with “material things and of capital” (p.284) had excluded a consideration of values: “they were politely bowed to, and then handed over to the clergy to be kept for Sundays” (p.284).

Donham’s own thinking was greatly influenced by Whitehead. He invited him to present a lecture at HBS, which subsequently appeared as an introduction in Donham’s (1931) book *Business Adrift*. In it, Whitehead outlined this theory of foresight: “such a reflective power is essentially a philosophic habit: it is the survey of society from the standpoint of generality” (p.xxvi-xxvii). What he advocated was not a study of business in society, but a study of society, based on a philosophic outlook, in which business plays an important part.

While at the start of his tenure, Donham defined ‘judgment’ narrowly as being able to make decisions and take action to solve business problems, as the social and economic crises of the 1920s and 1930s escalated, destabilizing the capitalist system and raising the genuine possibility that it might topple, he came to realise that a more expansive notion of judgment was required of HBS faculty and students.

Our present situation both here and in all the great industrial nations of the world is a major breakdown of capitalism. Can this be overcome? I believe so, but not without leadership that thinks in terms of broad social problems instead of in terms of particular companies.” (Donham, 1932, p.207).

Donham recognised that if managers each pursued profit-maximisation strategies in the short term, the crisis would worsen. In *Business Adrift* he called on managers to maintain their workforces despite falling demand for their products, and to reduce working hours while maintaining workers’ pay, so they could stimulate demand by spending money in their leisure time. Reviews of the book noted its “radical, indeed socialistic” ideas (*Harvard Crimson*, September 21, 1932) and the “philosophical undercurrent” beneath the learning at HBS (*Time*, 1921, p.46). Whitehead’s tribute to Donham upon his retirement in 1942 (p.236) credited him for shifting the purpose of a business education from “decisions once based on the personal interests of industrial leaders” to a deeper and more sophisticated understanding of the role of business in society.

This aspect of HBS’ past is curious for two reasons. First, whilst Donham and Whitehead feature prominently in histories of the HBS and the case method, their normative views about the state of capitalism and an expanded conception of business education do not. It is this past, forgotten by history, that can help us rethink the form of the case method today, as we shall explain shortly. Second, while Donham came to understand the limitations of the case method as he originally conceived it, there is no evidence it became something different as a result. He looked to other areas of the curriculum for cultivating foresight amongst the student body, but the case method retained its focus on training students to solve business problems (Cruikshank, 1987).

This was a disappointment for Ordway Tead, a theorist of workplace democracy who had taught with Donham at HBS and had seen great promise for it as a vehicle to deliver Whitehead’s vision. In his review of Andrews’ (1953) book, Tead argued that all judgement depended on social values, but at HBS “there is no adequate scrutiny of preconceptions and values” (p.105). Tead concluded it “a pity that there is no longer an Alfred North Whitehead to help to lead the technicians out of the bleak wilderness of techniques” and until a more philosophical outlook was incorporated into business education “the method of instruction, including the provocative case method, will remain thin and inconclusive” (p.106).

This aspect of HBS’ forgotten past resonated with us because it is suggestive of a case method that is much needed in today’s business schools. Donham wanted his students to think independently, critically and creatively and not be bound by existing thinking. Whereas he saw his theory-free case method as stimulating innovation, we believe it has the opposite effect. As McGregor argued eloquently in *The Human Side of Enterprise* (1960), all managerial behaviour is based upon a theory or perspective: ‘The insistence on being practical really means, “Let’s accept *my* theoretical assumptions without argument or test.” The common practice of proceeding without explicit examination of assumptions leads, at times, to remarkable inconsistencies in managerial behaviour’ (1960, p.7, emphasis in original).

The limitation of a theory-free approach is that students’ thinking is bound within a particular set of assumptions about the case method. As Contardo & Wensley (2004, p.212) argue, the case method, conceived in this way, cannot accommodate innovation, “where innovation is understood as questioning the underlying assumptions sustaining managerialism or acknowledging problems that may subvert the dominant capitalist system”. The structured approach that came to rival Donham’s permissive approach was not much better, for while it gave theory a formal part in the case method presentation, it was also wedded to the problem-solving approach. While this pragmatism might have greater legitimacy in times of stability, its limitations are exposed during periods of turbulence, as Donham found out. At these moments, the problem-solving approach becomes problematic, because it is concerned with making assumptions rather than examining them (Jacques, 1996).

It is a pity that this promise for a philosophically informed, critically reflexive case method was not fulfilled. However, given the parallels between their turbulent times and our present conditions, their thinking remains relevant. By learning from this past, how could the case method be different today? In the following section we focus on three features and illustrate these by drawing on our case writing and teaching experiences.

*Seeing cases as a means for developing understanding of organizations and their place in society, rather than for training future managers.*

Throughout its 100-year history, HBS has assumed that it is training future managers and this assumption is reflected in its case method. We think this assumption, shared by the call for this special issue, is worth reflecting on. Is education *for* management really our mission, or are we in the business of providing an education *of* management? Only a proportion of our students will become managers, but virtually all will, or have already, become employees. Rather than the standard approach of writing cases that position students in the ‘shoes’ of a manager, why not put them in the shoes of an employee – what better place to learn about the complex task of managing? Or why position them as any individual in a case? Or place the organization at the centre of the analysis? Many case writers have moved away from a shareholder perspective of the firm and adopted a stakeholder lens to engage with issues of sustainability, CSR and ethics. This remains an organizational-centric perspective, where the interests of other stakeholders are to be assessed to make a decision for what is best for the organization. While it is important that students are exposed to this perspective, we would also advocate a deeper and reflective analysis of the relationship between business and society, where the interests of business do not take priority over the interests of other stakeholders, where students are invited to consider competing interests as inevitable and legitimate in a democratic society, and where the assumptions and practices of contemporary capitalism might be critically engaged. Unpacking the complex relationship between business and society would be helped by drawing on theoretical tools from beyond the mainstream of the business school curricula, such as sociology, political economy, law, and industrial relations.

Some of our most successful cases do not have a central protagonist and invite students to consider a range of conflicting interests from multiple perspectives. One is about the industrial dispute over the filming of *The Hobbit* in New Zealand in 2010, where following the passing of a ‘do not sign the contract’ motion by the International Federation of Actors (FIA) in pursuit of collective bargaining and an improvement in terms and conditions of employment, Warner Brothers threatened to relocate the production offshore. In doing so, Warner Brothers was able to extract from the New Zealand government a change in labour law under urgency, which effectively removed all employment rights from anyone working in the film industry, and an additional $33 million in taxpayer subsidies on top of the $60 million already secured. This is a case which lends itself to an analysis of the power of multinational corporations and the influence they can have over government policy. It highlights the value of a critical approach to the study of globalisation in its exploration of issues of power, conflict and inequality. It considers the tensions between attracting foreign direct investment and protecting workers’ rights, and the extent to which the pursuit of economic outcomes should take account of equality and fairness. And it assesses the possibilities for workers to organise collectively in trade unions both locally and internationally to counter the power of global capital and to prevent social dumping and a ‘race to the bottom’ in labour standards.

Whilst we know from our own experimentation with the case method, and talking with others about their experiences, that cases are used in a myriad of ways, unfortunately there is a dominant orthodoxy which reduces these alternative approaches to second-class status. We realized this when we considered entering leading case competitions. The CEEMAN Writing Competition ‘compulsory submission criteria” states that “All cases should be *teaching cases* based on *a real situation in a real company*, with a *clear decision-making* situation” (emphasis in original). The Emerald Emerging Markets case studies “aim to solve a business problem” and should “describe the actions of a central protagonist who makes management decisions”. While decision-forcing cases undoubtedly have their place in business education, sadly this blinkered view of what constitutes a high quality case is the norm, rather than the exception. As we have seen, in times of crisis, Donham realised that more was required of HBS students. They were required to assert a leadership role in society, which meant looking beyond the instrumental concerns of particular companies.

Viewing the case method as a vehicle for generating an understanding *of* management, rather than as a training *for* management, need not come at the expense of the employability of our students. Employers we talk to want graduates highly skilled in analysis, critical thinking and creativity, with these core skills easily supplemented by job-specific training. We believe this would be best accomplished by moving beyond an assumption that we are training future managers.

*Problematise assumptions about a minimalist role for the state*

One of the benefits of looking back at the past is that certain patterns become evident, which helps us reflect critically on our present state. A recurring response by business schools, accreditation agencies and the consulting industry to economic crises and business scandals through the past 100 years has been assurances that managers are professionals who can be trusted and, relatedly, that a minimalist role for the state is desirable. Following the global financial crisis, Dominic Barton, global managing director of McKinsey and Co warned business leaders of the potential for “the social contract between the capitalist system and the citizenry [to] truly rupture” with governments stepping in to assume control. Following Enron and other scandals the Association to Advance Collegiate Schools of Business (AACSB, 2004, p.7) said that “at issue is no less than the future of the free market system, which depends on honest and open enterprise to survive and flourish”. Prominent business Charles Handy (2002, p.55) said that unless managers act ethically, “democratic pressures may force governments to shackle corporations… and we shall all be the losers.”

This is not to deny the legitimacy of a free market view, but we find it disturbing that this ideological preference attracts such little scrutiny. Was not one of the main causes of the global financial crisis a lack of government control over crucial aspects of the financial services sector, which enabled ‘too big to fail’ financial institutions to take massive risk in the pursuit of short-term profitability? This was a lesson from the 1930s that we should not have needed to learn again. While it could be argued that Donham’s response was just another attempt to save capitalism from its excesses, our historical research reveals back then there was more debate about the role of the state than we see today.

While the potential for the case method to address this issue remained unfulfilled in Donham’s time, it can be accommodated, as we have learnt from our own writing and teaching efforts. One case looked at the closing of a call centre in Ireland by TalkTalk, one of the UK’s largest telecommunications providers, with the loss of 575 jobs and 30 days’ notice. Under Irish redundancy law, companies must enter into a period of consultation with employees in a redundancy situation of at least 30 days. The aim of the consultation period is so that the parties can consider any alternatives to redundancy. TalkTalk met the minimum legal notice period requirement, though there was no meaningful consultation and the decision was irrevocable, despite lobbying from senior government Ministers who asked them to reconsider or at least extend the period of notice, which might allow for the call centre to be sold as a going concern and the jobs to be saved. Government Ministers and high ranking civil servants claimed this was irresponsible corporate behaviour by TalkTalk, but when pressed on enhancing employment rights their response was that ethical behaviour, rather than more regulation, was what was needed. We present the CSR employee philosophy of TalkTalk and invite students to consider the extent to which CSR is a genuine attempt on the part of organizations to engage with important social and ethical issues as opposed to window-dressing behaviour. We also ask them to consider the role of regulation in protecting the interests of other stakeholders. One of the most significant policy debates over the past 15 years has been between voluntarist approaches and ‘hard’ law when it comes to aligning corporate behaviour with the interests of society. The discourse of ‘better regulation principles’ has encouraged a shift away from law towards ‘light touch’ regulation, the promoting of self-regulation, the encouragement of firms to go ‘beyond compliance’ in order to improve competitiveness, and other forms of ‘soft’ governance (McLaughlin & Deakin, 2012). We ask our students to draw on regulation theory and debates over hard and soft law in considering how effective that shift has been in this case.

*Writing cases that encourage students to challenge the agency of managers*

The case method, when viewed as a training in solving business problems, makes one further

assumption that is worth reflecting critically on: that managers are powerful people whose decisions have a large impact on their organizations. Make well-considered decisions and the problem will be solved, make poor decisions and the problem will worsen, perhaps threatening the viability of the organization. This assumption that ‘managers matter’ underpins much mainstream theorising. In leadership, this is attested to by the emphasis given to transformational leadership, and more recently authentic leadership – the assumption being that charismatic and genuine leaders can transform their companies by generating high levels of commitment. In culture, there is a prevailing view that strong and skilful leaders can shape organizational cultures according to their desires, and that if the culture is dysfunctional, then leaders have both the responsibility to fix the problem and the power to do it (Schein, 2004).

Theory can play a useful role in helping students problematize this assumption. For example, in our case about culture change in a national police organization following sexual abuse allegations involving officers, we first place students in the position of the Police Commissioner and ask them to devise a culture change initiative. We then introduce them to critical approaches which see culture as evolving over time and being created by all members of the organization as they make sense of their experiences. This enables us to discuss with students the limits of the Commissioner’s power, given the large, old and geographically dispersed nature of the organization, as well as the dangerous nature of front-line policing and how this shapes the shared values of police officers. This case also lends itself to drawing on theorisation around power, resistance and identity.

We have also written cases that consider the wider structural features of global capitalism and how the short-term focus of capital markets on quarterly reporting and the fear of hostile takeover incentivises managers to avoid long-term value creation strategies, such as investing in sustainability or more ethical employment standards. As Reich (2008) argues in his book *Supercapitalism*, our current economic system is good at increasing returns for investors, but poor at dealing with the social and environmental issues of our time because of the relentless systemic pressures for firms to lower costs and increase profits. Understanding the relationship between managerial agency and financial capitalism is important for gaining insight into organizational decisions, but these cases need theory to illuminate their dynamics. This need not be telling students what to think, as Donham feared, but of providing them conceptual lenses to unpack these complex features and see them from multiple perspectives. The result is a more realistic view of practice resulting from the engagement with theory.

**Conclusion**

In thinking about what we, management educators, should be doing in today’s turbulent times, we would be wise to look to history for guidance. The difficulty is that the lessons from the upheaval of the 1920s and 30s that has parallels with what faces us now have been airbrushed from management history. Scan the pages of most introductory management textbooks and you will find little written about the New Deal in the United States (Marens, 2010; Mills, Weatherbee, Foster, J, & Helms Mills, 2015). The only event that garners major coverage are the experiments conducted at the Hawthorne Works by Elton Mayo from HBS, where it was supposedly discovered that a happy worker is a productive worker, and that by allowing employees to satisfy their social needs, significant productivity gains can accrue. You will not learn from those textbooks, or most institutional histories of HBS (Copeland, 1958), or most histories of the case method (Garvin, 2003; Grandon Gill, 2011; Merseth, 1991; Mesny, 2013) about the past that we have shone a light on in this paper – of an HBS dean whose mind was preoccupied by the social and economic catastrophe unfolding around him. Of a dean dismayed by a capitalism that seemed out of control and by business leaders complicit in feeding its excesses. And of his belief in the need to fundamentally rethink the relationship between business and society, and the role of business schools.

In times of turbulence, we need to question capitalism, as Donham, Whitehead and others were doing in the 1930s. Although they did not utilise the case method for this purpose, we can – and we must if we are to develop a case method that is fit for purpose. To do this requires a rapprochement with theory, not in the way Donham originally intended, which was to use the case method as a means of developing general principles of managing. And not in the structured approach which became institutionalised after World War II, where models, concepts and frameworks are applied in a mechanistic way to business problems. Rather, we can use theory to problematize the status quo.

We need cases which focus on worst practice, as well as best practice, because we often learn most from failure. We need cases that look from the perspective of employees and other stakeholders, including government, and not just from management. And we need cases that encourage our students to question the form of the capitalist system, rather than to place such questioning outside the bounds of legitimate analysis. These cases will encourage students to reflect on the power of structures, and not assume agents are all powerful. To do all of this, we need theory playing an active, critical and creative role in the case writing and teaching process.

Our paper is a challenge not just to the mainstream of management studies, which many would see HBS as being the leader of, but also to more critical approaches. For Contardo and Wensley there is no hope for change at HBS since “the case methodology is pervasive and not questioned because it is too central for the whole institution.” (p.225). Greenhalgh (2007) points the finger at HBS for breeding the scientific problem solving approach and suppressing problem-posing, creative alternatives. And while Rendtorff (2015) and Jackson (2011) share our interest in thinking about the potential for the case method to engage meaningfully with theory, they conclude that HBS is not interested in theory.

We depart from these studies in one important respect – they all see innovation as coming from somewhere other than HBS. It is our contention that HBS has a more diverse and interesting past that is conveniently forgotten by supporters, and therefore unseen by the critics – a past that can be drawn upon to rethink the case method for today and the future.

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