

In The Name of God

Case Method: Participant-Centered Learning

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اولین همایش ملی

کاربرد مورد کاوی

در آموزش مدیران دولتی

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محورهای همایش

واکاوی مفهوم مورد کاوی

- چستی (ویژگی‌ها و استانداردها)
- کارکردها (اهداف و تأثیرات)
- نخله‌ها (تبارشناسی و رویکردها)

مطالعات مورد کاوی در خصوص تجارب مدیریتی

- افزایش بهره‌وری
- تربیت مدیر
- تعاملات بین سازمانی
- مردهمی‌سازی
- چابک‌سازی
- انگیزش

روایت تجربه مدیران در حوزه‌های نظام اداری

- آموزش توانمندسازی
- جریان خدمات
- جذب و انتصاب
- توسعه زیر ساخت فناوری و هوشمندسازی
- بهره‌گیری حداکثری از ظرفیت‌های مردهمی
- بهره‌وری
- اصلاح ساختار
- جانشین‌پروری

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موردکاوی : روش یادگیری مشارکت محور



تاریخ و مکان برگزاری:

دوشنبه ۲۳ بهمن ماه ساعت ۱۰ الی ۱۲
تالار ملک الشعراء بهار دانشگاه بجنورد

ارائه دهنده: دکتر محمد شیخ زاده
(رئیس دانشگاه بجنورد)

دانشگاه بجنورد و مرکز آموزش مدیریت دولتی
با همکاری دانشکده حکمرانی دانشگاه تهران برگزار می کند:



دکتر محمد شیخ زاده
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کاربرده موردکاوی در آموزش
تئوری های مدیریت



دکتر علی اصغر بور عزت
(رئیس دانشکده حکمرانی دانشگاه تهران)

ارزش شکست ها و پیروزی ها

تاریخ و مکان برگزاری:

چهارشنبه ۱۶ اسفند ساعت ۱۰ الی ۱۲
دانشکده حکمرانی دانشگاه تهران - سالن دکتر عادل آذر واقع در خیابان ۱۶ آذر
نرسیده به خیابان پورسینا، درب پارکینگ - دانشگاه تهران

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دکتر محمد شیخ زاده
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دکتر اسدالله گنجعلی
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دانشگاه امام صادق)

تاریخ و مکان برگزاری:

سه شنبه ۱۵ اسفند ساعت ۱۵ الی ۱۷
دانشگاه امام صادق - دانشکده معارف اسلامی و مدیریت

دانشگاه بجنورد و مرکز آموزش مدیریت دولتی
با همکاری دانشکده مدیریت و اقتصاد دانشگاه تربیت مدرس
برگزار می کند:

موردکاوی : روش یادگیری مشارکت محور



دکتر محمد شیخ زاده
(رئیس دانشگاه بجنورد)



دکتر حسن دانایی فرد
(رئیس دانشکده مدیریت و اقتصاد دانشگاه تربیت مدرس)

تاریخ و مکان برگزاری:

چهارشنبه ۱۶ اسفند ساعت ۱۳:۳۰ الی ۱۵
دانشکده مدیریت و اقتصاد دانشگاه تربیت مدرس

موردکاوی: آسیب شناسی آموزش رشته مدیریت در ایران

• عنوان طرح: «بررسی آسیب‌ها (ضعف‌ها و تهدیدها) در رشته مدیریت»

• مجری: معاونت پژوهشی دانشگاه شهید بهشتی

• کاربر: دبیرخانه شورای عالی انقلاب فرهنگی

• واحد علمی: شورای تحول و ارتقاء علوم انسانی

• با همکاری: کارگروه مدیریت

• پژوهشگران: شمس، غلامرضا؛ فروزنده دهکردی، لطف‌الله؛ خلیجیان، صدف؛ قلیچ لی، بهروز

آسیب‌های آموزشی موجود در رشته مدیریت

- عدم تناسب محتوای دروس با نیازهای جامعه و بازار کار
- **عدم کاربردی بودن محتوا و برنامه آموزشی رشته مدیریت**
- **ضعف محتوای آموزش در پرورش مهارت های تخصصی و کاربردی**
- عدم ارائه آموزش مبتنی بر کار آفرینی
- توجه کم به برنامه‌های کارآموزی در تدریس
- **فقدان فرصت عملی برای یادگیری**
- تکراری بودن مباحث تئوری رشته مدیریت
- عدم نقد و بررسی محتوای درسی

برخی آسیب‌های مرتبط با متون و محتوا

آسیب‌های آموزشی موجود در رشته مدیریت

- قدمت اهداف آموزشی رشته و عدم توجه به مباحث به روز مدیریت
- **عدم انطباق اهداف آموزشی با اهداف و نیازهای جامعه، اقتصاد و صنعت و نداشتن قابلیت اجرایی**
- ابهام و سردرگمی در هویت و اهداف رشته مدیریت
- قدمت و عدم تناسب سرفصل‌ها با نیازهای جامعه و بازار کار
- ابهام، کلی‌گویی و سطحی بیان کردن سرفصل‌ها
- **کاربردی نبودن سرفصل‌های موجود**
- **عدم همخوانی درست سرفصل‌ها با دنیای واقعی**
- عدم توجه به خواسته‌های اساتید و دانشجویان در تهیه سرفصل‌ها، اهداف و محتوای آموزشی
- فقدان نظام ارزشیابی درست

برخی آسیب‌های مرتبط با اهداف آموزشی و سرفصل‌ها

آسیب‌های آموزشی موجود در رشته مدیریت

- عدم اطلاع اساتید از تجربه‌های مدیریتی جدید در سازمان‌ها
- ضعف و نارسایی‌های موجود در روش‌های تدریس
- **عدم استفاده از روش‌های تدریس تأثیرگذار و تأکید صرف بر استفاده از روش تدریس قدیمی**
- عدم وجود نیروی انسانی متخصص در زمینه تدریس در این رشته
- **عدم استفاده از تجارب مدیران موفق در آموزش مدیران و دانشجویان**
- عدم برگزاری کلاس‌های عملی و کارگاه مهارت‌آموزی و تیم‌های کاری برای آموزش عملی به دانشجویان
- توجه کم به برنامه‌های کارآموزی در تدریس (فقدان فرصت عملی برای یادگیری) و تأکید بر آموزش تئوریک
- فقدان سنت نقد، تضارب آراء و پرسشگری
- **عدم بکارگیری موردکاوی‌های تجربی مدیریتی در تدریس توسط اساتید**
- نامطلوب بودن وضعیت تعاملات دانشگاهی مانند ارتباط بین استاد و دانشجو
- عدم ارائه بازخورد به موقع به دانشجو و عدم ترغیب دانشجو به تفکر

برخی آسیب‌های مرتبط با ویژگی‌های اساتید و مدرسان

تاملی در آموزش مدیریت در جهان

- آموزش عالی با رویکرد میان رشته‌ای و جهت‌گیری کارآفرینی: تجربه‌ای از دانشکده کسب و کار دانشگاه کلارکسون، کنفرانس ملی نقش مطالعات میان‌رشته‌ای در توسعه علمی و کارآفرینی کشور، ۲۸ آبان ۱۳۹۷
- ارائه چارچوبی برای توسعه تعاملات درون دانشگاهی و برون دانشگاهی در دانشکده‌های علوم انسانی: الگوبرداری از دانشکده کسب و کار دانشگاه کلارکسون، نخستین همایش علوم انسانی، تولید و صنعت، ۵ و ۶ اسفند ۱۳۹۷
- الگوبرداری از موسسات اعتبارسنجی و تضمین کیفیت رشته مدیریت در جهان برای ارتقای کیفیت و اثربخشی آموزش مدیریت در ایران، پانزدهمین کنفرانس ارزیابی و تضمین کیفیت، ۱۹ و ۲۰ آبان ۱۴۰۰
- چارچوبی برای تدوین و بازنگری کتب درسی مدیریت با رویکرد کاربردی و مهارت‌افزایی (مطالعه موردی و تطبیقی: کتب مدیریت رفتار سازمانی)، پژوهش‌نامه انتقادی متون و برنامه‌های علوم انسانی، شماره ۲۲، سال ۱۴۰۱، ص ۳۳۹-۳۷۲



پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

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الگوبرداری از موسسات اعتبارسنجی و تضمین کیفیت رشته مدیریت در جهان برای ارتقای کیفیت و اثربخشی آموزش مدیریت در ایران

محمد شیخ زاده

استادیار گروه آموزشی مدیریت بازرگانی، دانشگاه بجنورد





پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

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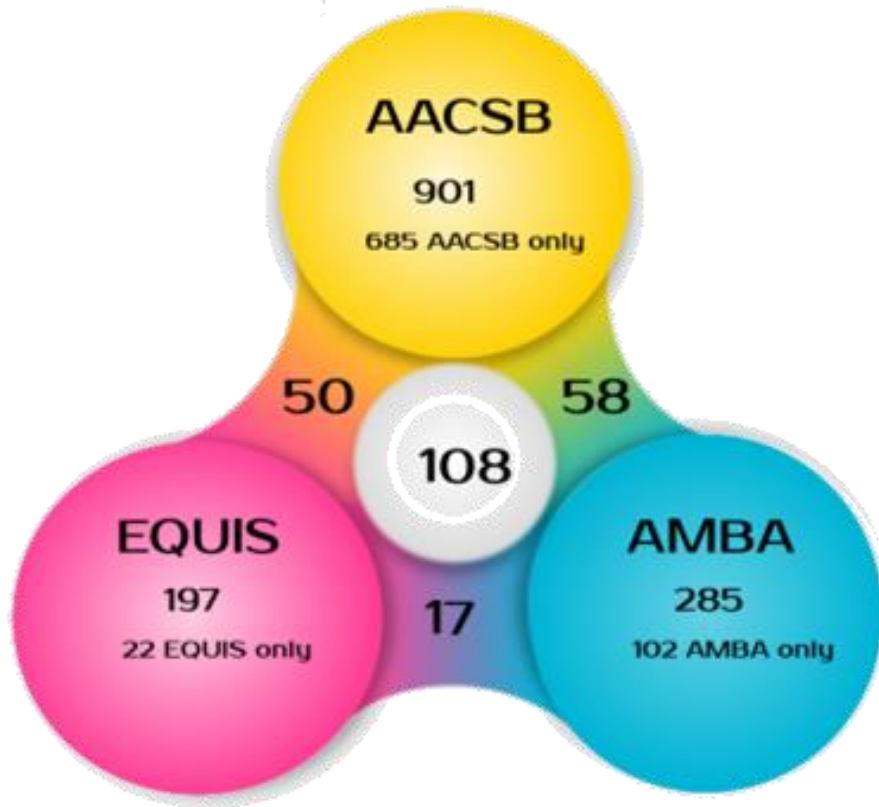
موسسات اعتبارسنجی و تایید صلاحیت حرفه‌ای مطرح رشته مدیریت در جهان

ردیف	نام موسسه	سال تاسیس	نوع سازمان	دفتر مرکزی	تعداد دانشگاه‌های عضو	تعداد دانشگاه‌های تایید صلاحیت شده	منبع: وب سایت موسسه
۱	AACSB	۱۹۱۶	غیرانتفاعی	فلوریدا، آمریکا	۱۷۰۰ دانشگاه	۹۰۱ دانشگاه	www.aacsb.edu
۲	AMBA	۱۹۶۷	غیرانتفاعی	لندن، انگلیس	۳۵۰ دانشگاه	۲۸۵ دانشگاه	www.associationofmbas.com
۳	EFMD	۱۹۷۲	غیرانتفاعی	بروکسل، بلژیک	۸۹۰ دانشگاه از ۸۸ کشور	-	www.efmdglobal.org
	EQUIS	۱۹۷۲				۱۹۷ دانشگاه	
	EPAS	۲۰۰۵				-	
۴	ACBSP	۱۹۸۹	غیردولتی	کانزاس، آمریکا	۱۲۰۰ دانشگاه	۸۷۰ دانشگاه / برنامه	www.acbsp.org
۵	IACBE	۱۹۹۷	غیردولتی	آمریکا	بیش از ۱۸۰ دانشگاه	۱۸۰۰ برنامه در ۱۵۰ دانشگاه	www.iacbe.org
۶	FIBAA	۲۰۰۲	غیردولتی	بن، آلمان	-	-	www.fibaa.org





اعتبارسنجی سه گانه - Triple Crown accreditation



اعتبارسنجی سه گانه یا سه ستاره، ترکیبی از سه اعتبارسنجی است که توسط حدود ۱۰۰ دانشکده مدیریت در سراسر جهان (کمتر از یک درصد از همه دانشکده‌های مدیریت) همزمان از سه موسسه بزرگ و مهم اعتبارسنجی شامل AACSB، AMBA و EQUIS دریافت شده است.

تعداد دانشکده‌های مدیریت تایید صلاحیت شده توسط یک، دو و سه موسسه اعتبارسنجی معروف دنیا

معرفی مؤسسه ارزیابی علمی دانشکده‌های بازرگانی

- با پدید آمدن دوره‌های ام‌بی‌ای در آمریکا، سه سازمان هم‌مسئول بررسی صلاحیت و کیفیت این دوره‌ها در آن کشور شدند که تأیید هر کدام از این سازمان‌ها لزوماً به مفهوم عضویت یا تأیید سازمان دیگر نیست. قدیمی‌ترین و معتبرترین این سازمان‌ها مؤسسه ارزیابی علمی دانشکده‌های بازرگانی AACSB است که تقریباً تمامی دانشگاه‌های سطح بالای آمریکا مورد تأیید آن قرار دارند. با این حال این سازمان صرفاً اعتبار پنج درصد از دوره‌های آموزشی ام‌بی‌ای در جهان را تأیید می‌کند.
- مؤسسه ارزیابی علمی دانشکده‌های بازرگانی AACSB که از سال ۱۹۱۶ و با عضویت هفده دانشگاه آمریکایی پدید آمد، امروزه بیش از ۷۸۰ دانشگاه را در ۵۳ کشور جهان مورد ارزیابی و تأیید قرار می‌دهد. علاوه بر سازمان‌های فوق‌الذکر اعتبار دوره‌های آموزشی و مدارک علمی به تأیید سازمان‌های محلی و ملی کشورهای متبوع می‌رسد.
- دو سازمان دیگر به نام‌های انجمن ارزیابی دوره‌ها و دانشکده‌های بازرگانی ACBSP مجمع بین‌المللی ارزیابی دانشکده‌های بازرگانی IACBE نیز این دوره‌ها را در داخل آمریکا و دیگر کشورهای جهان ارزیابی می‌کنند.

The AACSB Landscape



Accreditation Around the World



2020 STANDARDS

STRATEGIC MANAGEMENT AND INNOVATION

Standard 1: Strategic Planning

1

Standard 2: Physical, Virtual and Financial Resources

2

Standard 3: Faculty and Professional Staff Resources

3

LEARNER SUCCESS

Standard 4: Curriculum

4

Standard 5: Assurance of Learning

5

Standard 6: Learner Progression

6

Standard 7: Teaching Effectiveness and Impact

7

THOUGHT LEADERSHIP, ENGAGEMENT, AND SOCIETAL IMPACT

Standard 8: Impact of Scholarship

8

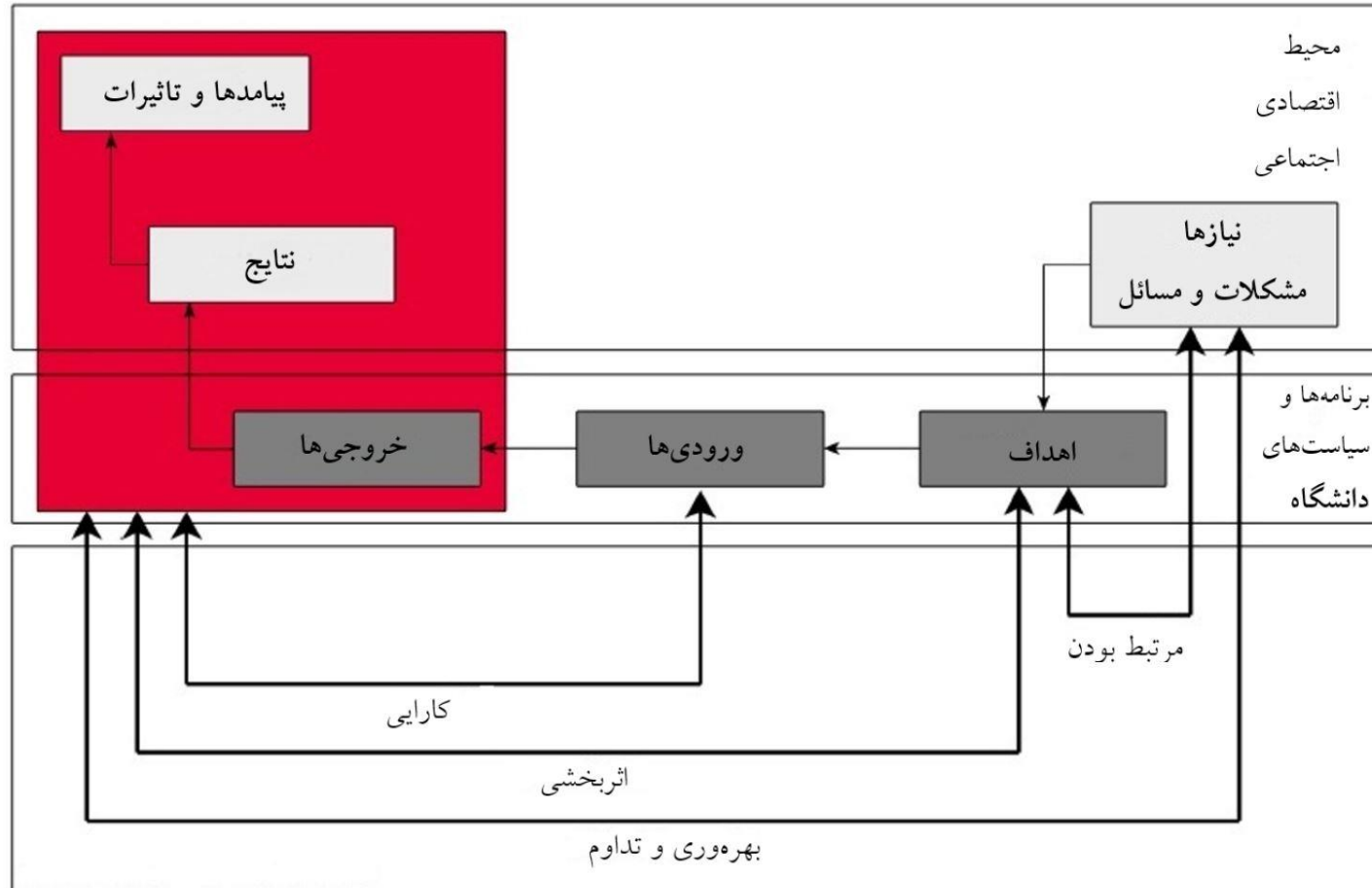
Standard 9: Engagement and Societal Impact

9

The importance of Societal Impact

AACSB's vision of societal impact is that **business schools contribute their specialized expertise to help mitigate some of society's most pressing** economic, social, human, and environmental **problems**.

رویکرد سیستمی ارتباط دانشگاه و جامعه



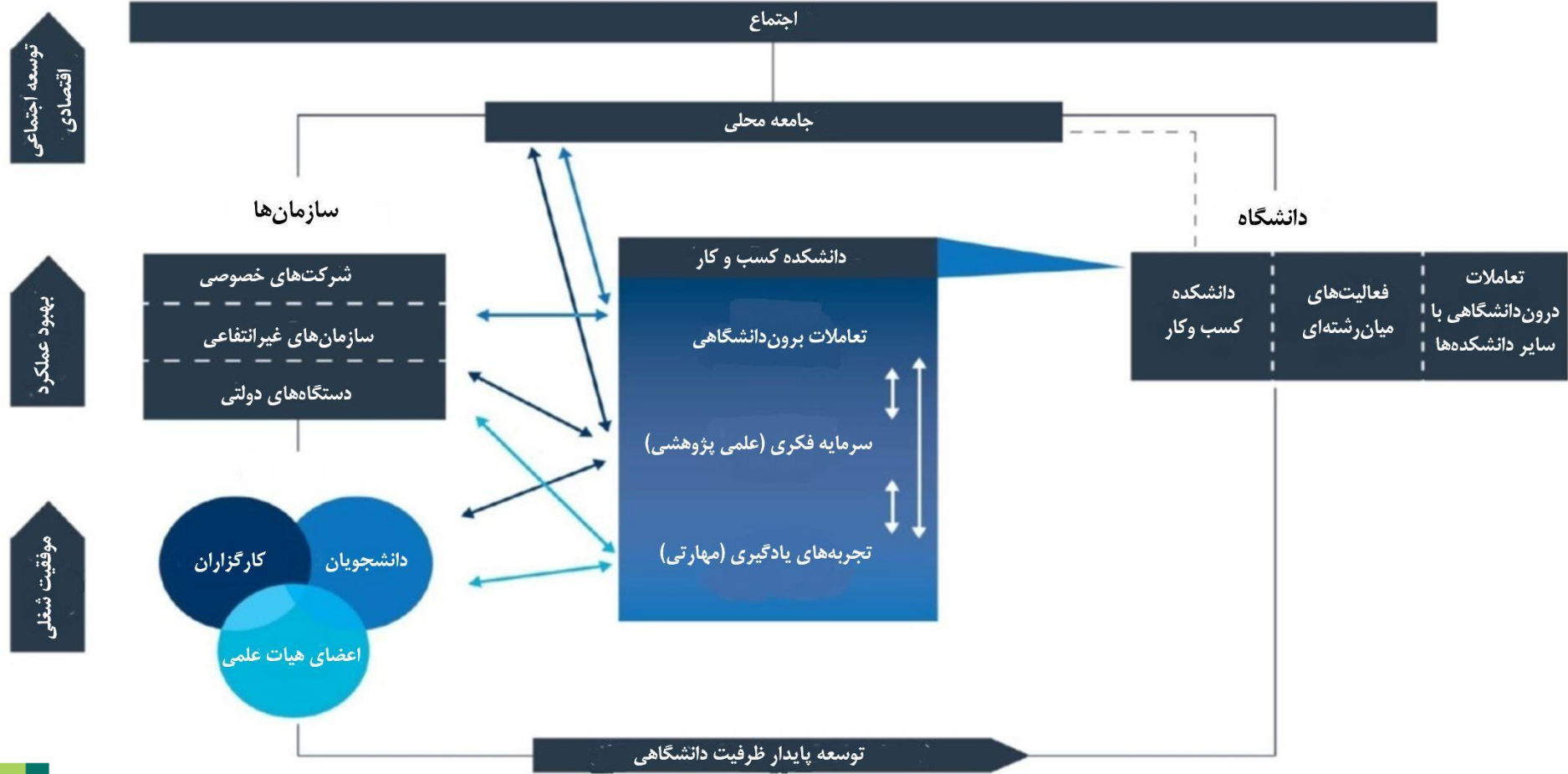
شکل (۱) - همکاری دانشگاه و جامعه مبتنی بر رویکرد سیستمی (Tijssen, 2017)

The importance of Societal Impact

Business schools will continue to prepare learners for gainful employment as an outcome of their investment in business education; however, numerous segments of the population have placed greater emphasis in recent years on ensuring that business schools also prepare learners with **knowledge and skills that mitigate societal problems**.

Further, companies have realized that they have a responsibility to improve the lives of all **stakeholders**, not only **shareholders**.

چارچوبی برای توسعه تعاملات درون دانشگاهی و برون دانشگاهی دانشکده های مدیریت



Looking Forward: Societal Impact Plans

01

This is not about more service. This is about your school bringing its business expertise in a ***chosen focus area*** to the table to help solve societal problems.

02

Expect peer review teams to ask what your chosen focus area(s) is for societal impact and ***how you plan to measure success***.

03

Societal Impact metrics for success are ***context specific***. You are empowered to create a vision and decide how you will measure success.

Societal Impact Roadmap



Step 1 – Choose one or more focus areas

Choosing a focus area is probably the most important step, but it is the step we see schools most likely to skip. Don't skip this step! Otherwise, a school might come up with a list of activities that are not strategically connected to the school's mission, resources, and stakeholder interest.

Step 1 – Choose one or more focus areas

To maximize the school's impact, **the focus area** should be reflected across the **curriculum, scholarship, and internal and external engagement activities**, thus unifying the school's vision for societal impact.

Importantly, this is not to say that a school must stop all other activities that don't relate to the societal impact focus area.

Step 2 – Identify desired impact and measures of success

When the focus area is clearly identified and named, the school needs to determine its desired impact and how it will measure success.

Developing an impact statement is a good device for accomplishing this goal and is very useful at the very beginning of your societal impact plans

Step 3 – Identify focus area initiatives and embed in curriculum, scholarship, and activities

When the focus area is clearly identified and named, the school needs to determine its desired impact and how it will measure success.

Developing an impact statement is a good device for accomplishing this goal and is very useful at the very beginning of your societal impact plans.

Societal Impact Roadmap

Step 4 – Create a plan and system for tracking outputs, outcomes, and impact



Societal Impact Roadmap

Step 5 – Assess your outcomes and impact as you prepare for your AACSB peer review visit





پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

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استانداردها و معیارهای اعتبارسنجی مورد استفاده در موسسات اعتبارسنجی مدیریت

▶ مدیریت راهبردی:

▶ مدیریت منابع:

▶ مدیریت آموزشی:

▶ مدیریت کیفیت:

▶ مدیریت تعاملات و مسئولیت اجتماعی:



پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

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مدیریت راهبردی:

- برنامه ریزی راهبردی (شامل بیانیه ماموریت، اهداف راهبردی)،
- تدوین ارزش‌های محوری (مانند صداقت، ثبات و تمایز موسسه، تعهد به صداقت، پاسخگویی و رفتار اخلاقی)،
- تعیین ساختار مدیریت و حکمرانی
- بررسی و ارزیابی عملکرد دانشکده



پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

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مدیریت منابع:

- منابع فیزیکی و مالی (امکانات و فضای آموزشی، منابع یادگیری، فناوری و مجازی)
- منابع انسانی (کیفیت و تناسب اعضای هیات علمی، ویژگی‌ها، فعالیت‌ها و فرایندهای اعضای هیات علمی شامل کیفیت جذب، بکارگیری، توسعه حرفه‌ای و ارزیابی عملکرد)
- فرایندها و خدمات اداری، مشاوره و پشتیبانی علمی با تمرکز بر دانشجویان و ذی‌نفعان (تدوین خط‌مشی‌ها، فرایندها و دستورالعمل‌های اداری، تحصیلی و شغلی دانشجویی)



پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

QAUS 2021

۱۹-۲۰ آبان



مدیریت آموزشی:

- طراحی و راهبری دوره، سطح و عمق برنامه درسی، ارزیابی تناسب و ارتباط دوره،
- تدوین و توسعه برنامه درسی و فرصت‌های یادگیری (عناوین دوره‌ها و برنامه‌های آموزشی متناسب با نیاز جامعه، بازنگری و بهبود برنامه درسی با رویکرد مهارت افزایی)
- تهیه محتوای مناسب و فرصت تعامل
- نوآوری در آموزش



پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

QAUS 2021

۱۹-۲۰ آبان



مدیریت کیفیت:

- اثربخشی تدریس، تضمین یادگیری و پیشرفت دانشجویان،
- تجربه کاری دانشجویان، توسعه فردی و توسعه شایستگی‌ها، نگرش‌ها و پیامدهای یادگیری،
- اثرگذاری و یادگیری مادام‌العمر،
- ارزیابی یادگیری دانشجویان و بهبود مستمر کیفیت



پانزدهمین کنفرانس ارزیابی و تضمین کیفیت در نظام‌های دانشگاهی

QAUS 2021

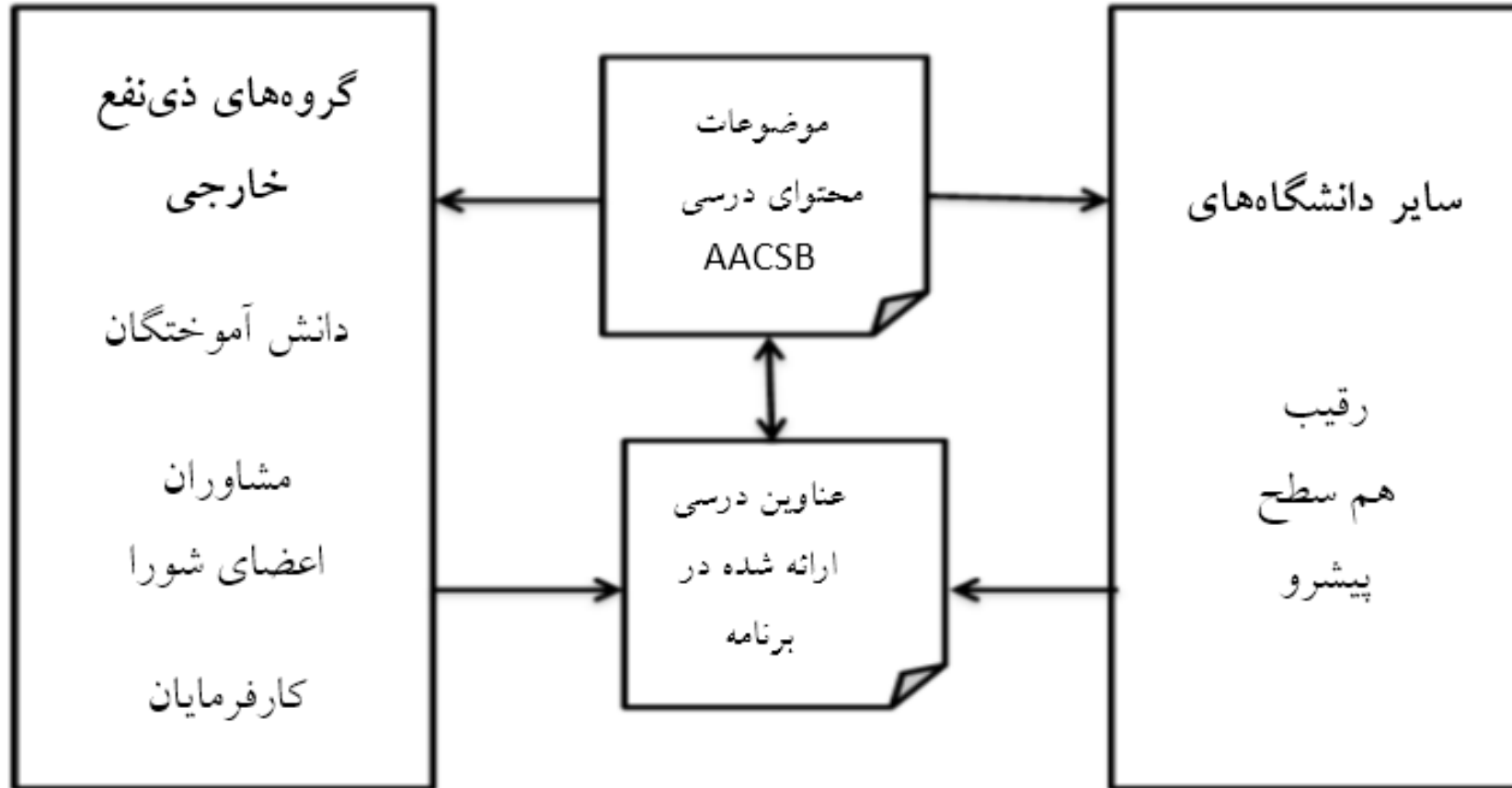
۱۹-۲۰ آبان



مدیریت تعاملات و مسئولیت اجتماعی:

- یکپارچه نمودن نیازهای دنیای کسب و کار و شرکت‌ها با برنامه‌ها، فعالیت‌ها و فرایندهای آموزشی و پژوهشی (تعاملات و ارتباطات گسترده بیرونی)
- ارتباط با جامعه، پاسخگویی به جامعه با انجام تحقیقات و فعالیت‌های پژوهشی تقاضامحور
- فعالیت در سطح بین‌المللی (جذب دانشجویان و اساتید بین‌المللی) و توجه به ابعاد بین‌المللی کسب و کار

چارچوب فرایند بازنگری سرفصل های درسی



موضوع و محتوای سرفصل‌های درسی طبق استاندارد AACSB

ردیف	موضوع و محتوای سرفصل‌های درسی
۱	مهارت‌های برقراری ارتباط
۲	توانایی‌های استدلال و درک اخلاقی
۳	مهارت‌های تحلیلی
۴	کاربرد فناوری اطلاعات
۵	پویایی‌های اقتصاد جهانی
۶	درک تنوع و چندگانگی فرهنگی
۷	مهارت‌های تفکر انتقادی
۸	مسئولیت‌های قانونی و اخلاقی در سازمان‌ها و جامعه
۹	تجزیه و تحلیل و ارائه گزارش‌های مالی

(AACSB) (Association for Advance Collegiate Schools of Business (AACSB))
صلاحیت دانشکده های مدیریت و کسب و کار را بررسی می کند. این انجمن انتظار دارد دانشجویان در یک فرایند یادگیری تجربی و فعال درگیر شوند که برای بهبود مهارت ها و کاربرد دانش در عمل طراحی شده است. طبق استانداردهای تایید صلاحیت AACSB حوزه های مهارت های عمومی دانشجویان عبارتند از:

- ارتباطات نوشتاری و گفتاری: توانایی برقراری ارتباط اثربخش و صورت شفاهی و مکتوب
- درک و فهم اخلاقی: توانایی شناخت مسائل اخلاقی و برخورد با مسائل با احساس مسئولیت اجتماعی
- تفکر انتقادی: توانایی تجزیه و تحلیل و شکل بندی مسائل و مشکلات (تمرین های مهارتی و کاربردی)
- فناوری اطلاعات: توانایی استفاده از فناوری روز در بافت های کسب و کار و مدیریت
- روابط میان فردی و کار تیمی: توانایی کار کردن به صورت اثربخش با دیگران و در محیط های تیمی
- محیط های کاری متنوع و چند فرهنگی: توانایی کار کردن اثربخش در محیط های متنوع
- تفکر انعکاسی یا بازتابی: توانایی درک خویشتن در بافت یک جامعه (تمرین های خودارزیابی)
- کاربرد دانش: توانایی تبدیل دانش کسب و کار و مدیریت به اقدام و عمل (تمرین های کاربردی و مهارت افزایی)

ارائه چارچوبی برای تدوین و بازنگری کتب درسی مدیریت با رویکرد کاربردی و مهارت افزایی (مطالعه تطبیقی موردی: کتب مدیریت رفتار سازمانی)

محمد شیخزاده*

چکیده

یکی از آسیب‌های جدی آموزش مدیریت در ایران، ضعف محتوای کتب درسی و عدم توجه به بُعد کاربردی و مهارت افزایی در نگارش آنهاست. هدف از این مقاله بررسی و مقایسه محتوای برخی کتب درسی مدیریت در حوزه رفتار سازمانی در داخل و خارج از کشور است. پس از بررسی کتاب های مختلف رفتار سازمانی که در دانشکده های مدیریت داخل و خارج از کشور تدریس می گردد، چهار عنوان کتاب درسی رایج شامل دو کتاب داخلی از انتشارات سمت و دو کتاب خارجی از انتشارات مک گراهیل انتخاب شدند. سپس با استفاده از روش تحقیق تطبیقی مورد-محور، و توافق و تفاوت این چهار کتاب بر اساس شاخص های ظاهری و محتوایی تحلیل و بررسی گردید. یافته های تحقیق نشان می دهد دو کتاب درسی داخلی عمدتاً با رویکردی نظری نگاشته شده اند و محتوای آنها به روز نیست در حالی که دو کتاب درسی خارجی با رویکرد کاربردی و مهارت افزایی تدوین شده است و از محتوایی منعطف، به روز و یکپارچه برخوردارند. در ادامه سرفصل ها و محتوای یکی از کتاب های خارجی به عنوان الگو با تفصیل بیشتری مورد بررسی قرار گرفت. در پایان چارچوبی برای تدوین و بازنگری کتب درسی مدیریت در ایران ارائه گردید.

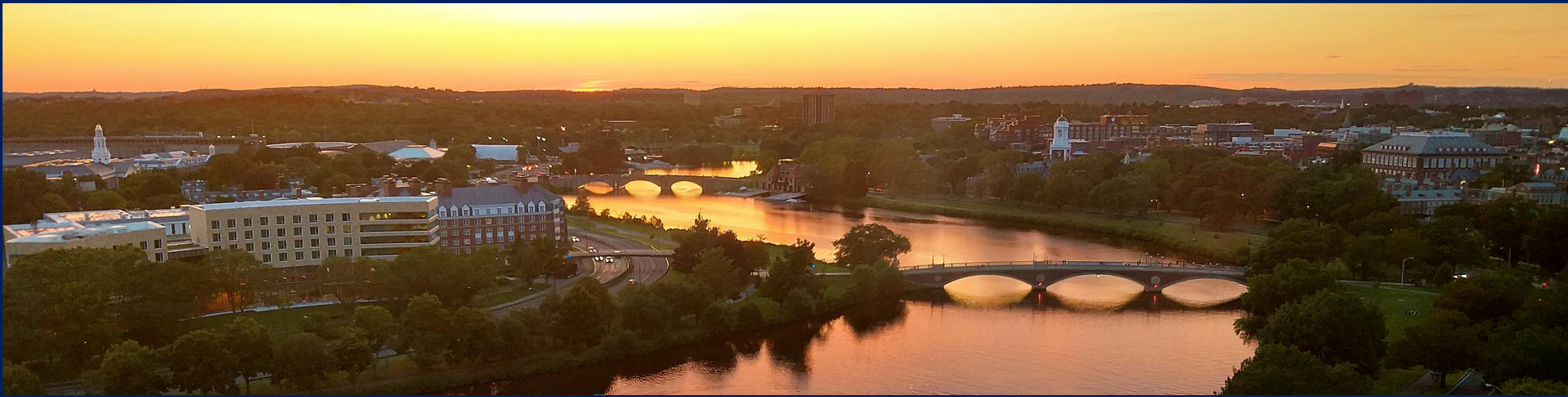
سه سطح حصول دانش در مورد روش تدریس



چگونگی؟

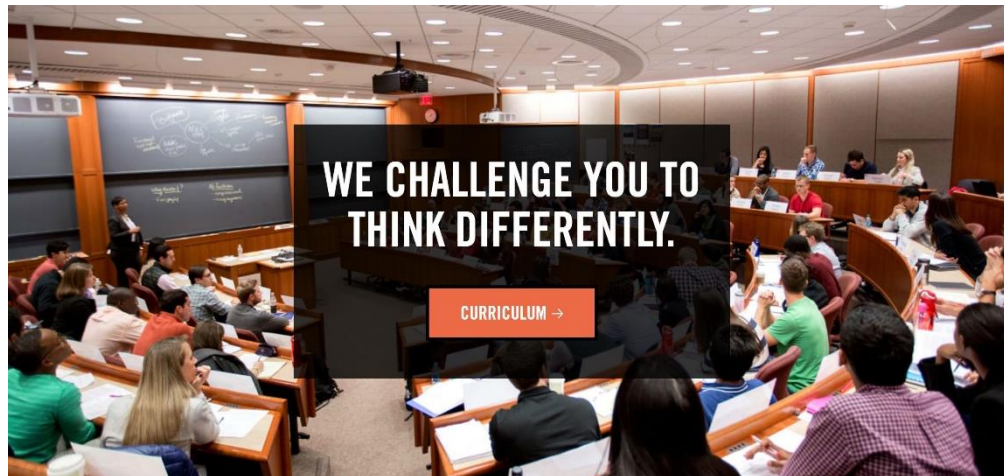
چستی؟

چرایی؟



Harvard Business School

Case Method



#WorldCaseTeachingDay

7 February 2024

Starts in: **00** **00** **00**
DAYS HOURS MINS



#WorldCaseTeachingDay

Every day, in thousands of business schools around the globe, classrooms come alive as fundamental beliefs and assertions are challenged, and students learn to think differently and more effectively through the case method. Introduced in 2019, **#WorldCaseTeachingDay** celebrates the contribution that this powerful pedagogical tool makes to the lives and careers of students and educators worldwide. **#WorldCaseTeachingDay** takes place annually on the first Wednesday in February.

Counting down

#WorldCaseTeachingDay on Wednesday 7 February 2024 is nearly upon us. The day is a fantastic opportunity to showcase how your organisation engages in case teaching, what innovative approaches are being explored, the benefits case teaching brings to your students, and its impact on your school's community.


Get involved

Getting involved is easy, take a look at the themes below, and get planning! Check out our [social media pack](#) for ideas.

We also encourage you to [take part in the online survey](#) exploring how case students, teachers and writers are using Generative AI.

Celebrating 100 Years of Case Method Teaching & Learning

1921



THE FIRST CASE: GENERAL SHOE COMPANY

The first standalone case, "General Shoe Company," by Clinton P. Bidle is published by the Bureau of Business Research.

10 MAY 1922


THE CASE SYSTEM NAMED

Faculty vote that the School's plan of instruction should be called the case system.

1922

UNIVERSITIES ADOPT HBS CASEBOOKS



One or more of the first five HBS casebooks have been adopted at 93 universities, signaling increasing popularity of discussion-based teaching in business education.



1922

CASE RESEARCH FUNDED AT GENERAL ELECTRIC

General Electric pays for HBS to research cases at GE, demonstrating the connection between the School and industry.

100 YEARS

CASE METHOD

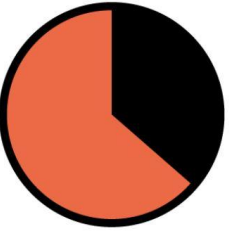
100 YEARS

From the publication of the first case in 1921 to teaching the case method online during the 2020 pandemic, we're marking the centennial of the case method in 2021 with these milestones, while looking forward to continued innovation, expansion, and inclusion.

1923

CASE METHOD CATCHES ON

Two-thirds of the School's courses are now taught by the case method.



Celebrating 100 Years of Case Method Teaching & Learning

1925



BUSINESS SCHOOLS DEBATE USE OF THE CASE METHOD

Members at the American Collegiate Schools of Business (ACSB), now the Association to Advance Collegiate Schools of Business (AACSB) convention debate use of the case method, now in use by 217 schools in U.S. Future HBS Dean, Professor Donald K. David, speaks in favor of it.

1939



15K CASES PRODUCED IN 18 YEARS

In the 18 years since the case method's inception, nearly 15,000 cases have been produced.

1951

TASK FORCE CREATED FOR CASE WRITERS

The Central Task Force for training case writers is created.

Celebrating 100 Years of Case Method Teaching & Learning

1953

OFFICE OF CASE DEVELOPMENT ESTABLISHED

The Office of Case Development is established to assume responsibility for all case research activities at HBS. A Case Development Policy Committee of the Faculty, and a Director of Case Development, are appointed.

11 JUN 1953



ALDRICH HALL DEDICATED

The School's new classroom building, Aldrich, is dedicated. Classrooms are specifically designed for teaching by the case method.

1954



SUMMER CASE WRITING PROGRAMS BEGINS

With Ford Foundation funding, HBS begins to conduct the Summer Case Writing Program, which encourages professors from other universities and colleges to learn more about the case method and to contribute information about their own cases.

1954

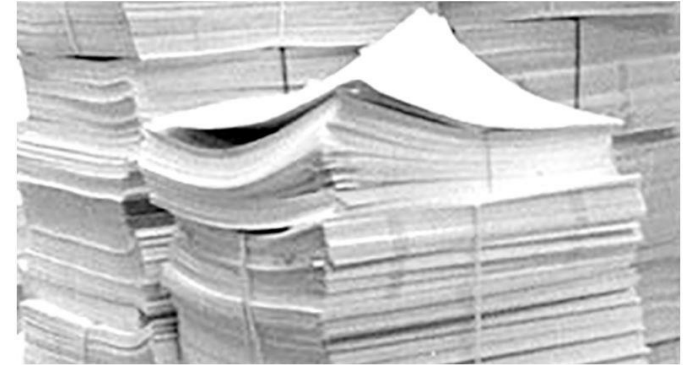


THE CASE METHOD GOES GLOBAL

With Ford Foundation funding, HBS enters into its first formal overseas relationship with the Institute of Business Administration at the University of Istanbul, Turkey.



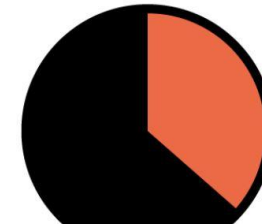
1955



NUMBER OF CASES AND COLLECTIONS IN PRINT GROWS

There are now 21 case collections in print as well as 50,000 individual cases.

1956



ANNUAL GOAL SET FOR CASE WRITING

School sets target of having one-third of faculty engaged in case development or project research each year.

Celebrating 100 Years of Case Method Teaching & Learning

1968



DOCTORAL STUDENTS INTRODUCED TO CASE METHOD TEACHING

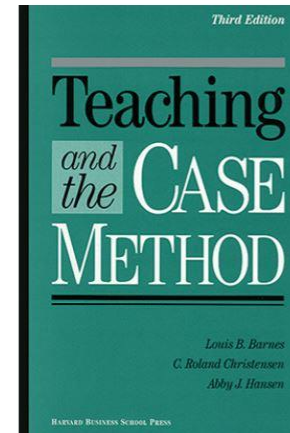
C. Roland Christensen initiates a series of annual seminars for doctoral students on case method teaching.

1981

CASE PUBLISHING SHIFTS TO COMPUTER FULFILLMENT

The internal case-publishing enterprise, which in 1980-1981 shipped 100 million pages to 6,000 customers around the world, but lost money, shifts to computer-based fulfillment.

1982



TEACHING BY THE CASE METHOD PUBLISHED

Teaching by the Case Method by C. Roland Christensen is published.

Celebrating 100 Years of Case Method Teaching & Learning

2020



BRINGING THE CASE METHOD ONLINE DURING COVID-19 PANDEMIC

HBS develops a hybrid classroom model to maintain teaching and learning by the case method during a global pandemic.

2020

RACIAL EQUITY PLAN CALLS FOR MORE BLACK PROTAGONISTS IN CASE STUDIES

Advancing Racial Equity plan includes goal of developing more cases with Black and other under-represented minority protagonists.

2021



CELEBRATING 100 YEARS OF THE CASE METHOD

During the 2021-2022 academic year, HBS celebrates 100 years of teaching and learning by the case method at the School.

<https://www.hbs.edu/case-method-۱۰۰>

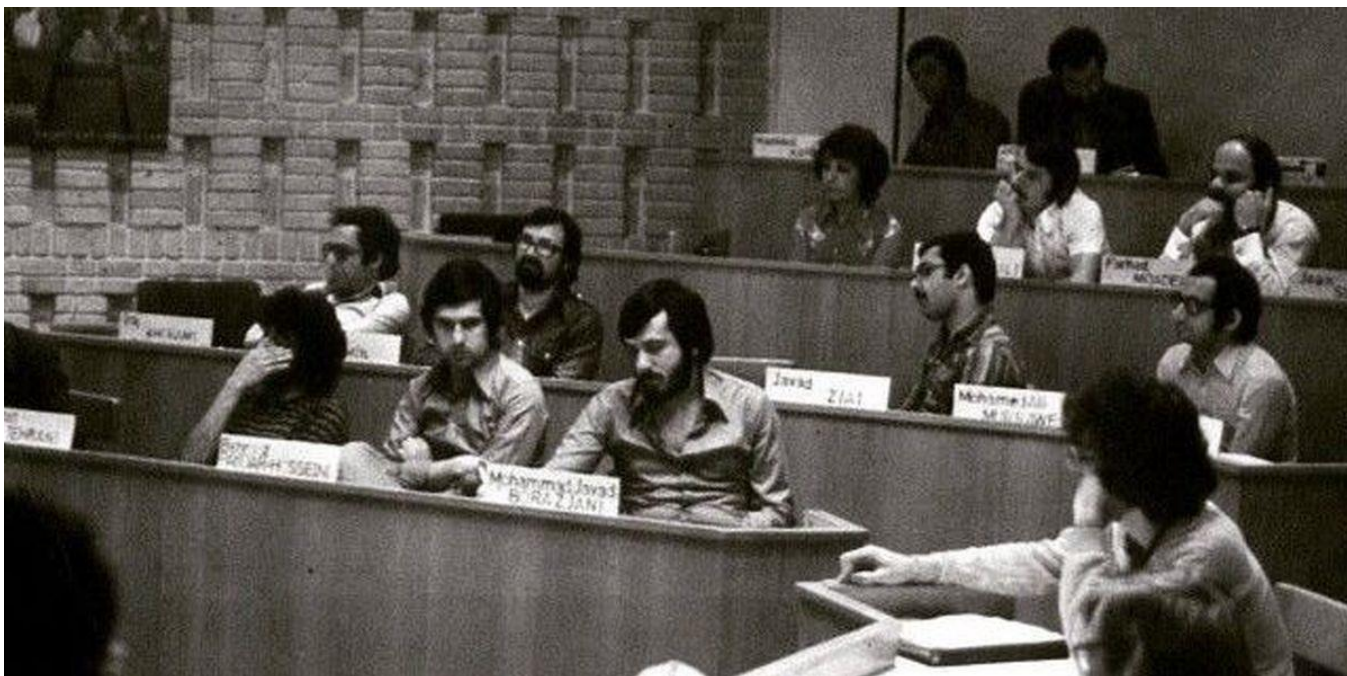
Iran Center for Management Studies (ICMS)



یک روایت تاریخی از ایده ساماندهی مدیریت‌های صنعتی تا تأسیس دانشگاهی برای تربیت مدیران دولتی

از مرکز مطالعات مدیریت ایران تا دانشگاه امام صادق

مرکز مطالعات مدیریت ایران (ICMS) با این هدف بنا نهاده شد تا سر و سامانی به اوضاع مدیریت واحدهای تولیدی و صنعتی بخش خصوصی ایران بدهد. شرایطی که اصلاً مطلوب نبود و باید برای آن فکری می‌شد. بخش خصوصی ایران تازه‌پا بود و برای رسیدن به این جایگاه راه زیادی را پیموده بود.



Iran Center for Management Studies (ICMS)

- صنعتی شدن کشور ما از ۱۳۴۱ آغاز شد.
- اولین گروه‌های سرمایه‌گذاران صنعتی، از ۱۳۴۱ به وجود آمدند که عمدتاً ملاکان سابق بودند
- بخش خصوصی که تا آن زمان خوانین و مالکان بزرگ بودند، حالا به بخش خصوصی تبدیل شده که صنعتگر است و خیلی از سرمایه‌گذاری‌های صنعتی در این ۱۰ ساله یعنی از ۱۳۴۱ تا ۱۳۵۱ توسط این سرمایه‌گذارهای خصوصی انجام می‌شود.
- «بخش خصوصی ایران فاقد توان نظری لازم است و به مدیرانی باسواد و آشنا به علم روز مدیریت نوین نیاز دارد». این ماحصل جلسات و سخنرانی‌هایی بود که کنفدراسیون اتاق‌های بازرگانی ایران در سال ۱۳۴۸ داشتند. بر اساس آن جلسات، بخش خصوصی ایران فاقد توان لازم است و در مرحله‌ای است که بازارهای منطقه به روی آن گشوده شده و لازم است با مدیریت روز جهان آشنا شود. آنها نیاز به مدیریت حرفه‌ای و دانش‌آموخته داشتند. برای این منظور ایجاد مرکزی برای آموزش مدیریت به مدیران و دست‌اندرکاران بخش خصوصی ضروری می‌نمود.

راه‌اندازی مرکز مطالعات مدیریت ایران

- در سال ۱۳۴۹ به اصرار و خواست حبیب لاجوردی تعدادی از افراد مؤثر در بخش خصوصی ایران گرد آمدند تا بنای تأسیس یک دانشکده مدیریت را با تمرکز بر بخش خصوصی بنیان گذارند. حبیب لاجوردی کسی بود که پروژه را راه‌اندازی کرد.
- حسن خسروشاهی از شرکت مینو، ابوالقاسم خردجو مدیرعامل بانک توسعه صنعتی و معدنی ایران، حبیب لاجوردی از شرکت صنایع بهشهر، سیاوش ارجمند از شرکت ارج، اردوان (مدیرعامل صنایع الکترونیک ایران در شیراز) اعضای هیئت مؤسس مرکز مطالعات مدیریت ایران بودند.
- پیش از آن حبیب لاجوردی وارد مذاکراتی با دانشگاه هاروارد آمریکا شده بود. او نیز تجربه حضور در این دانشگاه را داشت و با کارکردهای آن، ساختار و دانشکده‌هایی که این دانشگاه در کشورهای مختلف ایجاد کرده بود آشنا بود و به دنبال این بود که یک مرکز علمی وابسته به دانشگاه هاروارد را در ایران راه‌اندازی کنند.

افتتاح مرکز مطالعات مدیریت ایران

- این مرکز وابسته به دانشگاه هاروارد بود و از اعتبار و ساختار آن دانشگاه استفاده می کرد، در سال ۱۳۵۱ کار خود را آغاز کرد.
- این مرکز به عنوان شاخه ای از دانشگاه هاروارد ایالات متحده آمریکا بنا بود که با همکاری استادان آن دانشگاه به تربیت مدیران و متخصصان بخش های خصوصی و دولتی پردازد.
- رئیس این دانشگاه، آمریکایی بود و به وسیله دانشگاه هاروارد معرفی شده بود.



- هزینه هر دوره تحصیلی را یکی از شرکت‌های بخش خصوصی ایران تقبل می‌کرد. بیشترین هزینه‌ها را شرکت صنایع بهشر، ارج، آزمایش و الیاف تأمین کرده بود.
- کتابخانه مرکز نیز به کمک حبیب لاجوردی تجهیز شده بود.
- البته آموزش عالی کشور هم کمک‌هایی به آنجا می‌کرد. همچنان که به دیگر دانشکده‌ها و مراکز مطالعاتی پرداخت‌هایی داشت.
- از این دانشکده تا پیروزی انقلاب نزدیک به هزار دانشجو در مقطع فوق لیسانس فارغ‌التحصیل شدند. بخش عمده این دانشجویان جذب بخش خصوصی و شرکت‌های زیرمجموعه آنها شدند.
- نخستین رئیس آمریکایی دانشکده، پروفیسور لیورنش بود که بعد از سه سال به دانشگاه هاروارد در آمریکا برگشت. در زمان انقلاب سومین رئیس آمریکایی دانشکده، جیم بوومن، یکی از پروفیسورهای طراز اول هاروارد بود.

حسین عبده تبریزی: دانش آموخته و استاد مرکز

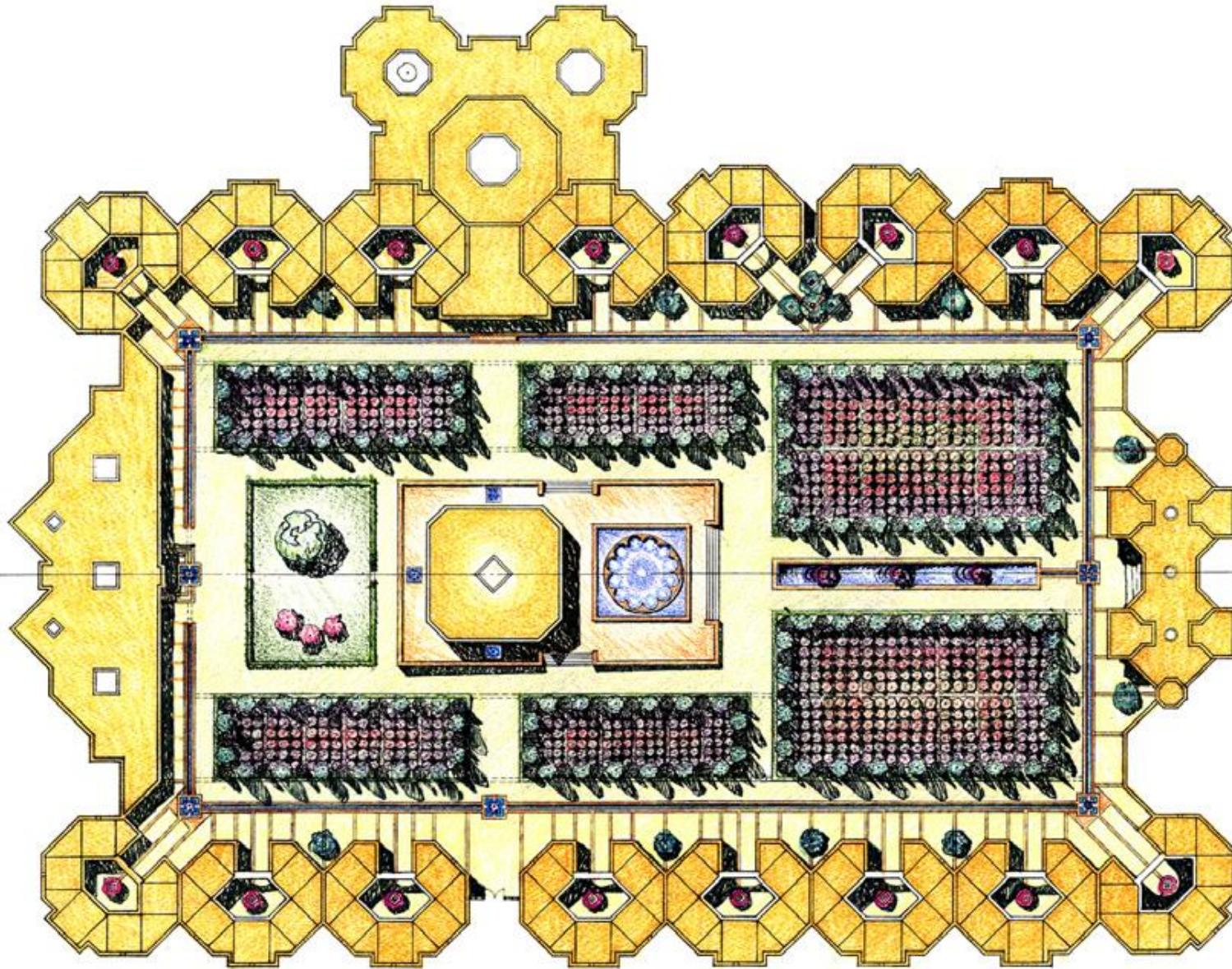
- «دوره‌های آن ۱۱ ماهه بود و فوق لیسانس می‌داد. مثل خود دانشگاه هاروارد.
- در ابتدا اکثر اساتید آمریکایی بودند، اما به مرور زمان تعدادی ایرانی هم به آنها اضافه شد.
- قرار بود که دانشجویان آن غیر از ایران از کشورهای دیگر هم باشند.
- چون هدف ارتقای دانش مدیریت در بخش خصوصی ایران بود، تعدادی فرزندان و مدیران و دست‌اندرکاران بخش خصوصی و برخی از مدیران دولتی در این دوره‌ها حضور داشتند».
- دانشجویانی از قبرس، آمریکا، کانادا، هلند، پاکستان، سودان و استرالیا به همراه ایرانی‌ها در این دانشکده مشغول تحصیل بودند.
- شهریه دانشکده در سال ۵۲ معادل ۱۶ هزار تومان بود.

حسین عبده تبریزی: دانش آموخته و استاد مرکز

- «دنبال آدم جوان نبودند. کسانی را می خواستند که تجربه های مدیریتی و کاری داشته باشند. برخی از فرزندان وزرا، آدم های پولدار و افراد موفق در بخش خصوصی از جمله دیگر دانشجویان آن بودند.
- مصاحبه ورودی داشت و افراد را با دقت و وسواس خاصی برمی گزیدند. به صورت یک مدرسه و دانشکده شبانه روزی بود و دانشجویان در طول این ۱۱ ماه در آنجا زندگی می کردند».
- مطالعات به صورت موردی انجام می شد. دو مورد پیش از ظهر و دو مورد را بعد از ظهر بررسی و مطالعه می کردند.
- مجموعاً حدود ۶۰۰ مورد را در طول این ۱۱ ماه بررسی و مطالعه می کردند و با استادان مورد تأیید دانشگاه هاروارد آنها را به بحث می گذاشتند.

طراحی و معماری مرکز

- نادر اردلان طراح و معمار این دانشکده در گفت‌وگویی که با مرکز مطالعات ایران داشته می‌گوید:
- «برای طراحی این دانشکده به هاروارد رفتم و ساختار فیزیکی و طراحی آن را دیدم و پس از گفت‌وگویی که با اعضای هیئت مؤسس داشتم و در نظر گرفتن خواسته‌های آنها، در نهایت به یک معماری ایرانی اسلامی رسیدم و آن را هم اجرا کردم.»
- دفتر معماری فرمانفرمایان متصدی طراحی و اجرای این پروژه بود که نادر اردلان با همکاری یحیی فیوضی طراحی بنا را بر عهده گرفتند.
- آنچه در طرح معماری این دانشگاه قابل توجه است، استفاده از الگوهای معماری ایرانی است؛ این گونه که طرح معماری بنا از هندسه باغ‌ها و مدارس ایرانی تبعیت می‌کند.



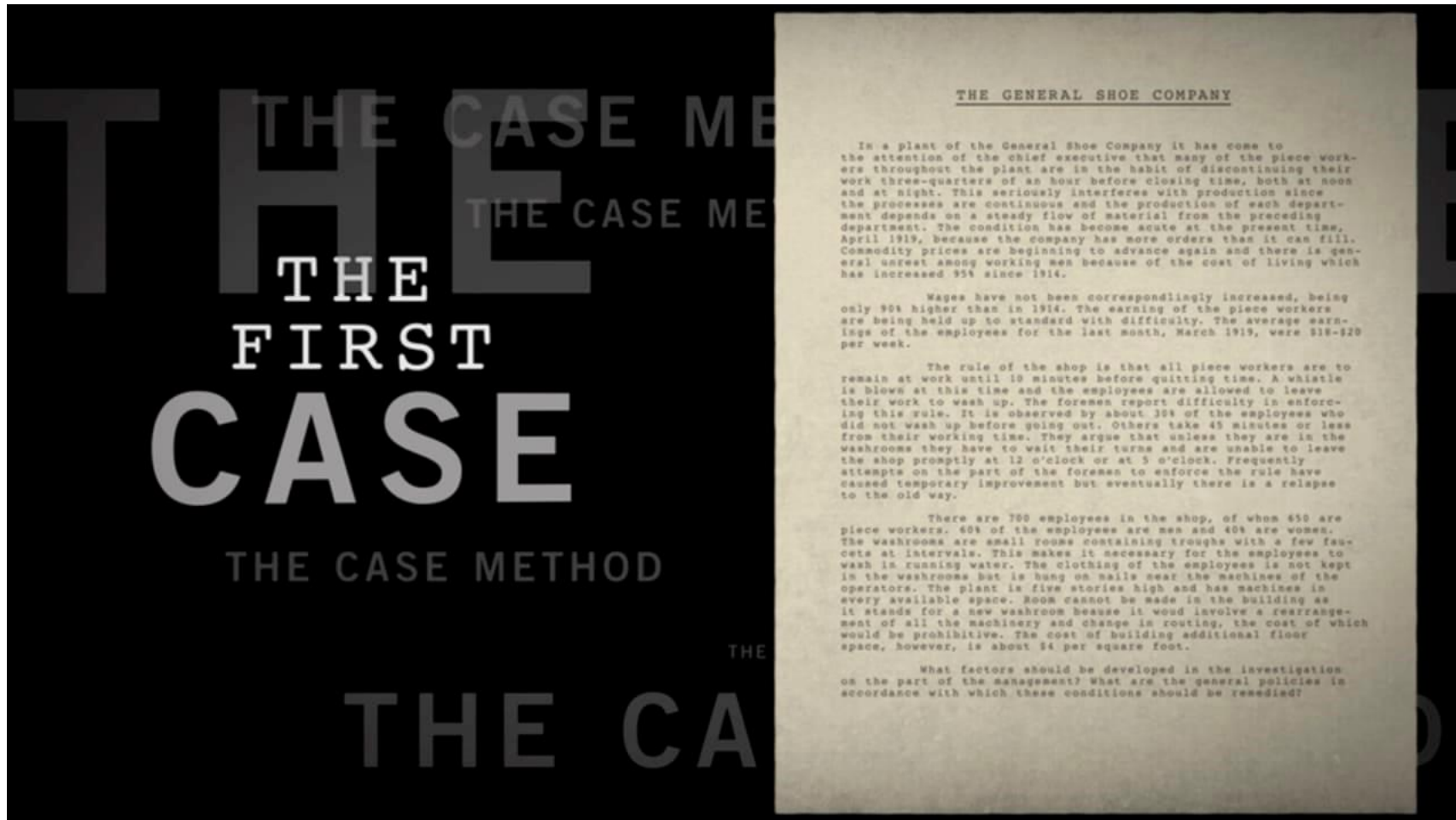


Iran Center for Management Studies (ICMS)



Iran Center for Management Studies (ICMS)

Exploring the Relevance and Efficacy of the Case Method 100 Years Later



The First Published Business Case - 1921

General Shoe Company

- It's 1921. At the General Shoe Company, employees in the company's manufacturing plant are routinely stopping work up to 45 minutes before quitting time. It's not for lack of business—the company has more orders than it can fill. So what, then, is the issue?
- After summarizing this situation, *General Shoe Company*—the first published business case, one page in length—concludes with two questions for the reader:
- What factors should be developed in the investigation on the part of management?
- What are the general policies in accordance with which these conditions should be remedied? In other words, what's going on here, and what should managers do to fix it?

The HBS Case Method



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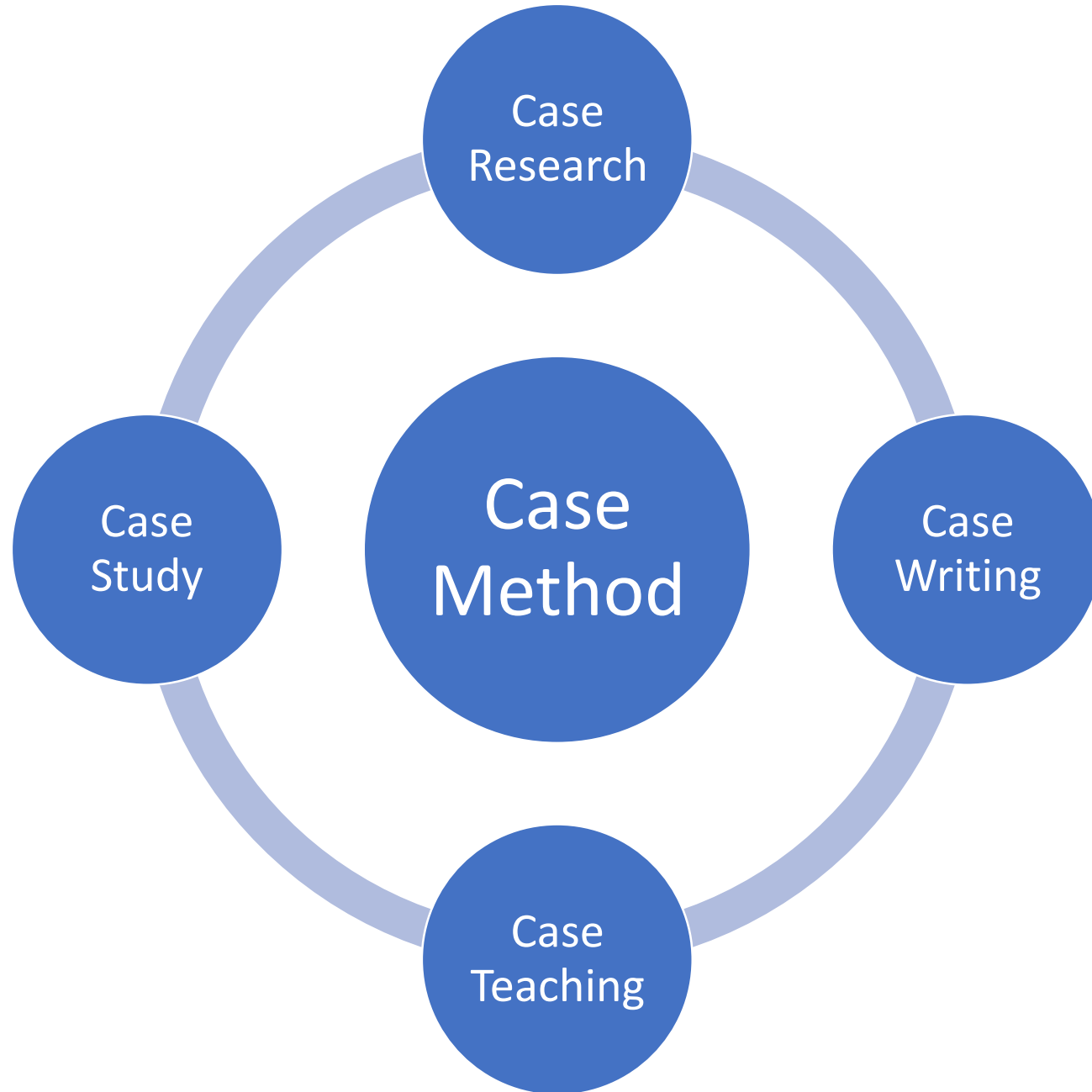
[+ Read more about the Case Method process](#)

500

Cases read during the two-year
MBA Program

33%

Cases are international



Case Teaching Objectives

Theory

To acquire the ability to apply management theory to real life situations

Engagement

To get students into the habit of diagnosing problems rather than the habit of being a receiver of facts, theories and concepts

Exposure

To provide exposure to a variety of firms, industries and managerial situations

Put the student in the role of the Decision Maker

1

READ THE CASE

2

DISCUSS THE CASE

3

ENGAGE IN CLASS

4

REFLECT

Read and analyze the case

Each case is a 10-20 page document written from the viewpoint of a real person leading a real organization. In addition to background information on the situation, each case ends in a key decision to be made. Your job is to sift through the information, incomplete by design, and decide what you would do.



Case review session

Discuss the case

Each morning, you'll bring your ideas to a small team of classmates from diverse professional backgrounds, your discussion group, to share your findings and listen to theirs. Together, you begin to see the case from different perspectives, better preparing you for class.



discussion group

Engage in class

Be prepared to change the way you think as you debate with classmates the best path forward for this organization. The highly engaged conversation is facilitated by the faculty member, but it's driven by your classmates' comments and experiences.

Students do the majority of the talking (and lots of active listening), and your job is to better understand the decision at hand, what you would do in the case protagonist's shoes, and why. You will not leave a class thinking about the case the same way you thought about it coming in!

In addition to learning more about many businesses, in the case method you will develop communication, listening, analysis, and leadership skills. It is a truly dynamic and immersive learning environment.



immersive learning environment

Reflect

The case method prepares you to be in leadership positions where you will face time-sensitive decisions with limited information. Reflecting on each class discussion will prepare you to face these situations in your future roles.

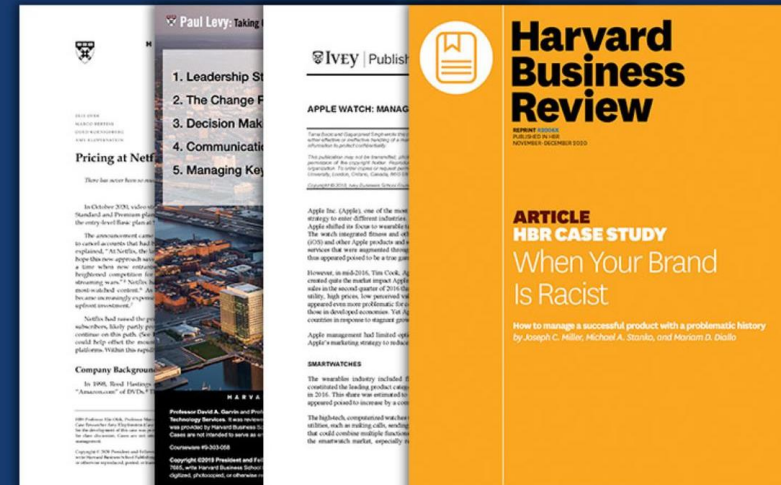


Reflection

Cases

Prepare your students to navigate business challenges by immersing them in real-world scenarios.

[View All Cases](#)



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Select a discipline and start browsing available cases.

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Economics

Entrepreneurship

Finance

General Management

Human Resource

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Topics



Help

Publication Date



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Christopher J. Malloy May 2021 • 6 p • R2103X-PDF-ENG • English

After a tsunami hits his island nation, Sahan Kumara believes that his family's business--one of the largest conglomerates in the...



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Topics

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Help



Book

Workparent: The Complete Guide to Succeeding on the Job, Staying True to...

Daisy Wademan Dowling May 2021 • 576 p • 10309-PBK-ENG • English

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Book

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Harvard Business Review, Carol Dweck, Marcus Buckingham, Francesca Gino, John H. Zenger May 2021 • 208 p • 10469-PBK-ENG • English

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About

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This listing contains abstracts and ordering information for case studies written and published by faculty at Stanford GSB.

Publicly available cases in this collection are distributed by [Harvard Business Publishing](#) and [The Case Centre](#).

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Vignettes



Search by title, author, case ID, or keyword



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- [Stanford Report News: Launching the 25th Generation of Cutting Edge Global Teamwork course](#)

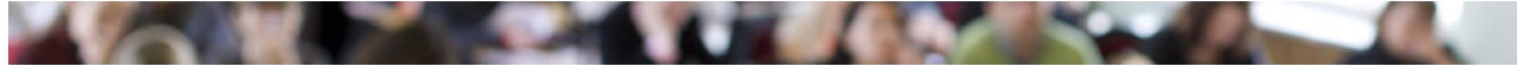
Education

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- [AEC Global Teamwork - a typical virtual teamwork story](#)



Goal

Problem Based Learning (PBL)



What's available - cases

Range of cases

Over 61,700 cases on all aspects of national and international business and management are available from The Case Centre.

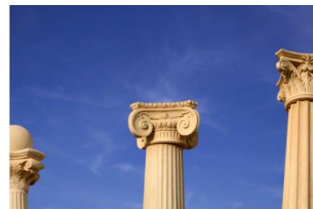
The Case Centre is the only place where you can access all the major case collections from leading international business schools (see below) as well as those of smaller schools and cases written by individual authors.

Most cases are in English, with about 5,700 cases also available in another language. [Learn more about what a case is](#)

The Case Centre is committed to increasing the diversity represented in cases created and used by the case community. Along with a range of our own initiatives, we actively support and engage with other organisations who are dedicated to this cause. [Find out more](#)



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How?

Implementing case teaching into Core Curriculum

Integrating the Case Method at Business Schools

Institutionalize

PROGRAM Approach for implementing the case Method
Look at Core courses and map case teaching across the program
Link 'Learning Goals' to the case method

Collaborate

Leverage industry relationships – for case development, internal competitions, class guest speakers (linked to cases)

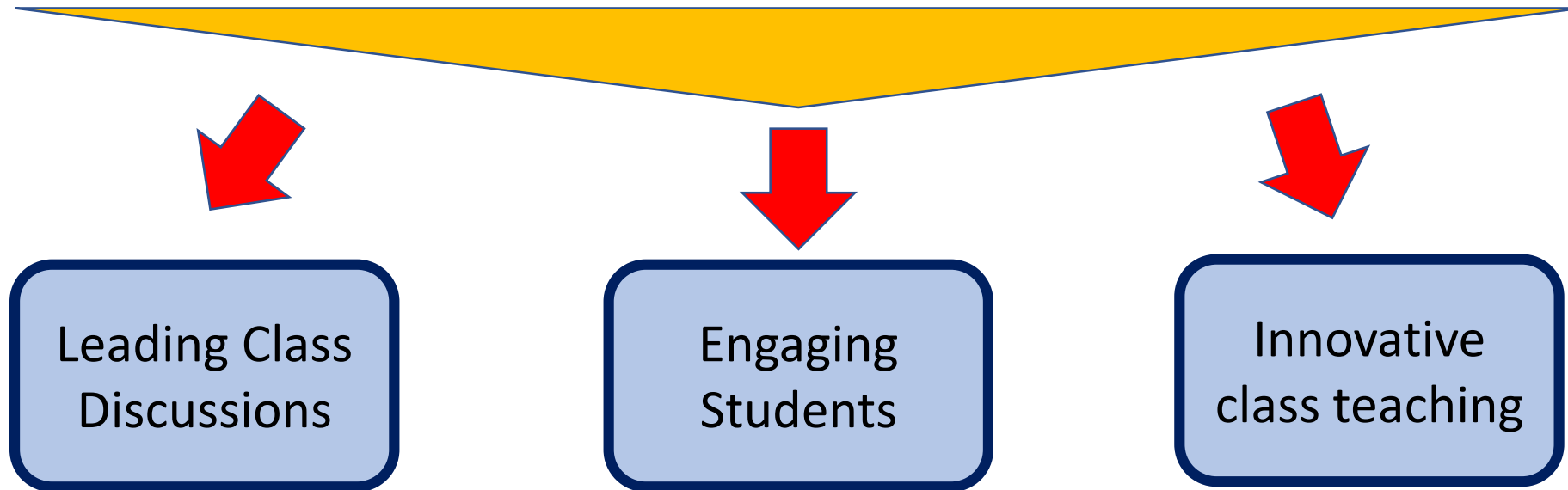
Foster

Faculty Projects
Student Activities – Case competitions, workshops, consulting, community outreach, coaching, etc.

The Case Method leads to building NEW capabilities

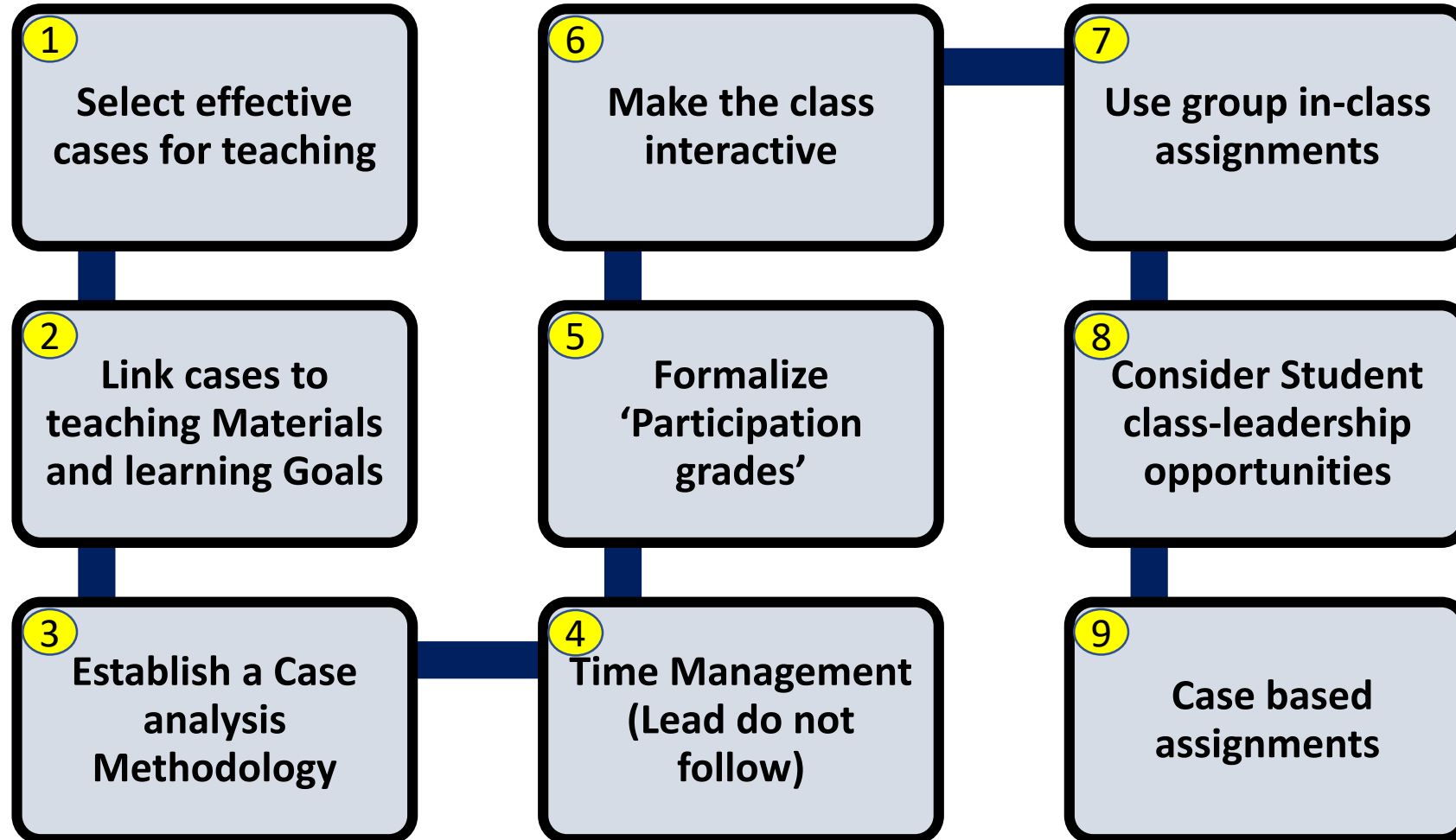
Utilizing the Case Method

Developing an effective class structure



Finding a balance between instructor facilitation and student involvement

Case Teaching Process Map



Integration of the case method

New Horizon of Case Method



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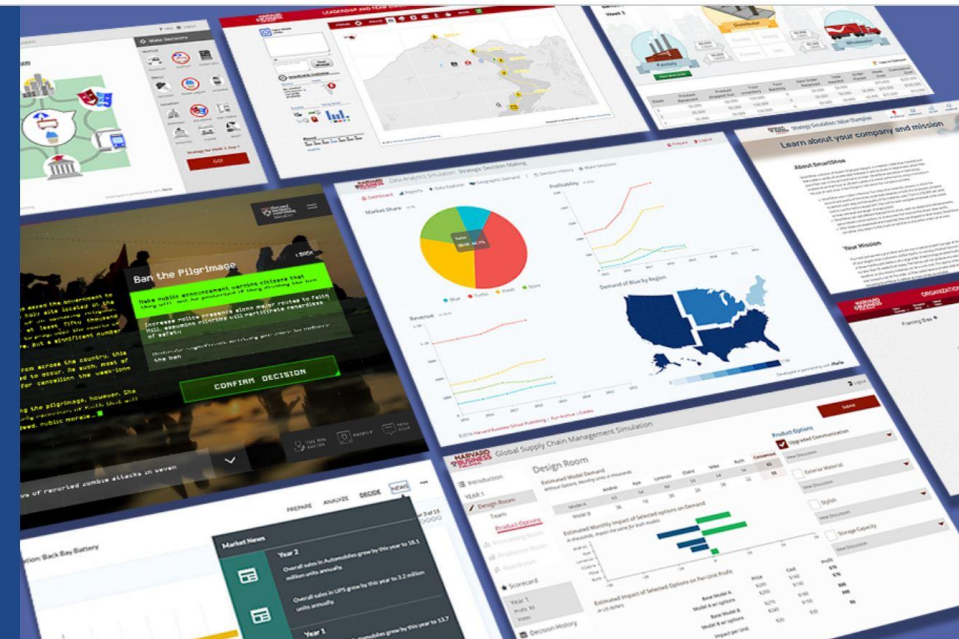


PENDING
Hi, M ▾

Simulations

Place students right in the mix of realistic business scenarios where they must apply the concepts they've learned to make decisions under pressure.

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Simulations

New Horizon of Case Method

Harvard Business School → MBA → Academic Experience → The Field Method

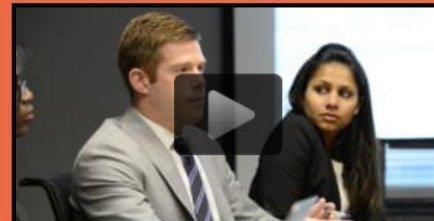
The Field Method Bridging the knowing-doing gap

As a complement to the case method, the field method enhances our capacity to educate leaders who make a difference in the world. The idea behind these complementary methods—case and field—is to provide a cycle of learning that involves learning by thinking, doing, and reflecting.

Field Immersion Experiences for Leadership Development (FIELD) is a year-long field course giving first-year students meaningful and numerous opportunities to act like leaders, translating their ideas into practice.



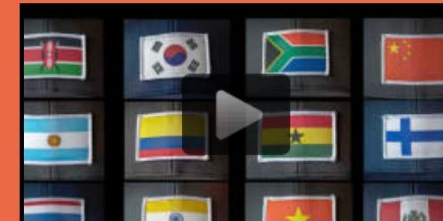
VIDEO
FIELD FOUNDATIONS: FEEDBACK & COMMUNICATION



VIDEO
INTO THE FIELD



VIDEO
CUSTOMER INTERACTION DAYS



VIDEO
FIELD GLOBAL IMMERSION LOCATIONS REVEALED

Real Case Experience



Customer Interaction Days

First-year students reflect on their experiences during Customer Interaction Days as part of FIELD Global Immersion. In preparation for their overseas assignment, students participate in a challenging, local team-based exercise. By practicing Design Thinking, a structured approach to meeting unmet customer needs, students develop a product or service for the US market similar to what their Global Partner will require come May.

FIELD Class Presentation

How?

Integrating Case Method into Management Textbooks

Tenth Edition

Human Relations *in Organizations*

APPLICATIONS AND SKILL BUILDING



Mc
Graw
Hill
Education

Robert N. Lussier

Understanding Behavior, Human Relations, and Performance



LEARNING OUTCOMES

After completing this chapter, you should be able to:

- | | | | | | | | | | | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|-------------|-------------------------|----------------|-------------------|------------|-----------------------|------------------|----------|----------|--------------------|----------------------|----------------|---------------------|--------------|------------------|------------------------------|--|
| <p>LO 1-1 Explain why human relations skills are important.</p> <p>LO 1-2 Discuss the goal of human relations.</p> <p>LO 1-3 Describe the relationship between individual and group behavior and organizational performance.</p> <p>LO 1-4 Briefly describe the history of the study of human relations.</p> <p>LO 1-5 State some of the trends and challenges in the field of human relations.</p> <p>LO 1-6 List 10 guidelines for effective human relations.</p> <p>LO 1-7 Identify your personal low and high human relations ability and skill levels.</p> | <p>LO 1-8 Identify five personal human relations goals for the course.</p> <p>LO 1-9 Define the following 17 key terms (in order of appearance in the chapter):</p> <table border="0"> <tr> <td>human relations (HR)</td> <td>performance</td> </tr> <tr> <td>goal of human relations</td> <td>systems effect</td> </tr> <tr> <td>win-win situation</td> <td>Elton Mayo</td> </tr> <tr> <td>total person approach</td> <td>Hawthorne effect</td> </tr> <tr> <td>behavior</td> <td>Theory Z</td> </tr> <tr> <td>levels of behavior</td> <td>intrapersonal skills</td> </tr> <tr> <td>group behavior</td> <td>interpersonal skill</td> </tr> <tr> <td>organization</td> <td>leadership skill</td> </tr> <tr> <td>organizational behavior (OB)</td> <td></td> </tr> </table> | human relations (HR) | performance | goal of human relations | systems effect | win-win situation | Elton Mayo | total person approach | Hawthorne effect | behavior | Theory Z | levels of behavior | intrapersonal skills | group behavior | interpersonal skill | organization | leadership skill | organizational behavior (OB) | |
| human relations (HR) | performance | | | | | | | | | | | | | | | | | | |
| goal of human relations | systems effect | | | | | | | | | | | | | | | | | | |
| win-win situation | Elton Mayo | | | | | | | | | | | | | | | | | | |
| total person approach | Hawthorne effect | | | | | | | | | | | | | | | | | | |
| behavior | Theory Z | | | | | | | | | | | | | | | | | | |
| levels of behavior | intrapersonal skills | | | | | | | | | | | | | | | | | | |
| group behavior | interpersonal skill | | | | | | | | | | | | | | | | | | |
| organization | leadership skill | | | | | | | | | | | | | | | | | | |
| organizational behavior (OB) | | | | | | | | | | | | | | | | | | | |

/// When Olin Ready graduated from college, he accepted his first full-time job with IBM. As he drove to work on his first day, he thought: How will I fit in? Will my peers and new boss Nancy Westwood like me? Will I be challenged by my job? Will I be able to get raises and promotions?

At about the same time, Nancy was also driving to work thinking about Olin: Will Olin fit in with his peers?

Will he be open to my suggestions and leadership? Will Olin work hard and be a high performer?

What would you do to ensure success if you were Olin? What would you do to ensure Olin's success if you were Nancy? Meeting employees' needs while achieving the organization's objectives is the goal of positive human relations in any organization. ///

COMMUNICATION SKILLS

The following critical thinking questions can be used for class discussion and/or as written assignments to develop communication skills. Be sure to give complete explanations for all answers.

1. In your opinion, which myth about human relations holds back the development of human relations skills more than any of the others?
2. Which person's contribution to the history of human relations do you find to be the most impressive?
3. Which one of the trends or challenges do you believe is the most relevant to the field of human relations?
4. Which one of the 10 guidelines for effective human relations do you think is the most important?
5. Of the three ways to handle human relations problems, which ones are the easiest and hardest for you?
6. Of the intrapersonal, interpersonal, and leadership skills, which one is your strongest? Your weakest?

CASE W. L. Gore & Associates: How Employees Relate to One Another Sets Gore Apart.

Founded in 1958, W. L. Gore & Associates, Inc. has become a modern-day success story as a uniquely managed, privately owned family business that truly understands the connection between behavior, human relations, and performance. Founders Bill and Vieve Gore set out to create a business where innovation was a way of life and not a by-product. Today, Gore is best known for its GORE-TEX range of high-performance fabrics and Elixir Strings for guitars. Gore is the leading manufacturer of thousands of advanced technology products for the medical, electronics, industrial, and fabrics markets. With annual revenues of \$3 billion. Gore has more than 10,000 employees, called associates, with manufacturing facilities in the United States, Germany, United Kingdom, Japan, and China, and sales offices around the world.⁶⁰

Terri Kelly replaced Chuck Carroll as the president and CEO of W. L. Gore & Associates in April 2005. Gore has repeatedly been named among the "100 Best Companies to Work For" in the United States by *Fortune* magazine. In a recent interview, Kelly was asked what would be the most distinctive elements of the Gore management model to an outsider. She listed four factors: "We don't operate in a hierarchy; we try to resist titles; our associates, who are all owners in the company, self-commit to what they want to do; and our leaders have positions of authority because they have followers." According to Kelly, these four attributes enable Gore to maximize individual potential while cultivating an environment that fosters creativity and also to operate with high integrity. She is quick to remind everyone that all of Gore's practices and ways of doing business reflect the innovative and entrepreneurial spirit of its founders.

Kelly attributes Gore's success to its unique culture. As she put it, how work is conducted at Gore and how

employees relate to one another set Gore apart. There are no titles, no bosses, and no formal hierarchy. Compensation and promotion decisions are determined by peer rankings of each other's performance. To avoid dampening employee creativity, the company has an organizational structure and culture that goes against conventional wisdom. Bill Gore (the founder) referred to the company's structure as a "lattice organization." Gore's lattice structure includes the following features:⁶¹

- Direct lines of communication—person to person—with no intermediary
- No fixed or assigned authority
- Sponsors, not bosses
- Natural leadership as evidenced by the willingness of others to follow
- Objectives set by those who must "make them happen"
- Tasks and functions organized through commitments
- Complete avoidance of the hierarchical command and control structure

The lattice structure as described by the people at Gore encourages hands-on innovation and discourages bureaucratic red tape by involving those closest to a project in decision making. Instead of a pyramid of bosses and managers, Gore has a flat organizational structure. There are no chains of command, no predetermined channels of communication. It sounds very much like a self-managed team at a much broader scale.

Why has Gore achieved such remarkable success? W. L. Gore & Associates prefers to think of the various people who play key roles in the organization as being leaders, not managers. While Bill Gore did not believe in smothering the company in thick layers of formal management, he also knew that as the company grew,

he had to find ways to assist new people and to follow their progress. Thus, W. L. Gore & Associates came up with its "sponsor" program—a human relations partnership between an incumbent, experienced employee and a newly hired, inexperienced employee. Before a candidate is hired, an associate has to agree to be his or her sponsor, or what others refer to as a mentor. The sponsor's role is to take a personal interest in the new associate's contributions, problems, and goals, acting as both a coach and an advocate. The sponsor tracks the new associate's progress, offers help and encouragement, points out weaknesses and suggests ways to correct them, and concentrates on how the associate might better exploit his or her strengths. It's about improving the intrapersonal skills of the new hire.

Sponsoring is not a short-term commitment. All associates have sponsors, and many have more than one. When individuals are hired, at first they are likely to have a sponsor in their immediate work area. As associates' commitments change or grow, it's normal for them to acquire additional sponsors. For instance, if they move to a new job in another area of the company, they typically gain a sponsor there. Sponsors help associates chart a course in the organization that will offer personal fulfillment while maximizing their contribution to the enterprise. Leaders emerge naturally by demonstrating special knowledge, skill, or experience that advances a business objective.

An internal memo describes the three kinds of sponsorship and how they might work:

- **Starting sponsor**—a sponsor who helps a new associate get started on his or her first job at Gore, or helps a present associate get started on a new job.
- **Advocate sponsor**—a sponsor who sees to it that the associate being sponsored gets credit and recognition for contributions and accomplishments.
- **Compensation sponsor**—a sponsor who sees to it that the associate being sponsored is fairly paid for contributions to the success of the enterprise.

An associate can perform any one or all three kinds of sponsorship. Quite frequently, a sponsoring associate is a good friend, and it's not uncommon for two associates to sponsor each other as advocates.

Being an associate is a natural commitment to four basic human relations principles articulated by Bill Gore and still a key belief of the company: fairness to each other and everyone we come in contact with; freedom to encourage, help, and allow other associates to grow in knowledge, skill, and scope of responsibility; the ability to make one's own commitments and keep them; and consultation with other associates before undertaking actions that could affect the reputation of the company. These principles underscore the importance of developing high interpersonal skills for Gore employees.

Over the years, W. L. Gore & Associates has faced a number of unionization drives. The company neither tries to dissuade associates from attending organizational meetings nor retaliates against associates who pass out union flyers. However, Bill Gore believes there is no need for third-party representation under the lattice structure. He asks, "Why would associates join a union when they own the company? It seems rather absurd."

Commitment is seen as a two-way street at W. L. Gore & Associates—while associates are expected to commit to making a contribution to the company's success, the company is committed to providing a challenging, opportunity-rich work environment, and reasonable job security. The company tries to avoid laying off associates. If a workforce reduction becomes necessary, the company uses a system of temporary transfers within a plant or cluster of plants, and requests voluntary layoffs. According to CEO Kelly, Gore's structure, systems, and culture have continued to yield impressive results for the company. In the more than 50 years that Gore has been in business, it has always made a profit.⁶²

Go to the Internet: To learn more about W. L. Gore & Associates, visit its Web site (www.gore.com).

Support your answers to the following questions with specific information from the case and text or with other information you get from the Web or other sources.

1. What evidence is there that W. L. Gore & Associates aspires to meet the goal of human relations?
2. How does Gore & Associates depict an organization that fully appreciates the "systems effect"?
3. One can argue that W. L. Gore's lattice structure encompasses some of the unexpected discoveries brought out by Elton Mayo and the Hawthorne Studies. Identify some features of the lattice structure that align with some of the unexpected discoveries of the Hawthorne Studies.
4. How does Gore's "sponsorship" program contribute toward meeting some of the 10 human relations guidelines outlined in the chapter?
5. Watch the video (<http://www.managementexchange.com/video/terri-kelly-wl-gores-original-management-model-0>) of CEO, Terri Kelly, and describe what she believes people would find surprising about management and how they work with their people at W. L. Gore.

Case Exercise and Role-Play

Preparation: You are a manager in an organization that wants to communicate in practical terms the meaning and importance of the systems effect and the total person approach to new employees during the orientation process. The manager is supposed to use examples to make his or her points. Based on your understanding of these two concepts, create a five-minute oral presentation on the meaning and importance of:





- a. The systems effect
- b. The total person approach

Role-Play: The instructor forms students into manager–new employee pairs and has each pair dramatize exercise a and b in front of the rest of the class. The student

playing the role of new employee should then paraphrase the manager’s message. After each presentation, the class is to discuss and critique the effectiveness with which the manager clearly communicated the meaning and importance of these two concepts and the effectiveness of the new employee in replaying the message.

OBJECTIVE CASE / / / Supervisor Susan’s Human Relations

Peter has been working for York Bakery for about three months now. He has been doing an acceptable job until this week. Peter’s supervisor, Susan, has called him in to discuss the drop in performance. (*Note:* Susan’s meeting with Peter and/or a meeting held by Tim with Susan and Peter can be role-played in class.)

SUSAN: Peter, I called you in here to talk to you about the drop in the amount of work you completed this week. What do you have to say?

PETER: Well, I’ve been having a personal problem at home.

SUSAN: That’s no excuse. You have to keep your personal life separate from your job. Get back to work, and shape up or ship out.

PETER: (Says nothing, just leaves.)

Susan goes to her boss, Tim.

SUSAN: Tim, I want you to know that I’ve warned Peter to increase his performance or he will be fired.

TIM: Have you tried to resolve this without resorting to firing him?

SUSAN: Of course I have.

TIM: This isn’t the first problem you have had with employees. You have fired more employees than any other supervisor at York.

SUSAN: It’s not my fault if Peter and others do not want to do a good job. I’m a supervisor, not a babysitter.

TIM: I’m not very comfortable with this situation. I’ll get back to you later this afternoon.

SUSAN: See you later. I’m going to lunch.

Answer the following questions. Then in the space between questions, state why you selected that answer.

- _____ 1. There _____ a human relations problem between Susan and Peter.
a. is b. is not
- _____ 2. Susan has attempted to create a _____ situation.
a. lose–lose b. win–lose c. win–win
- _____ 3. Susan _____ an advocate of the total person approach.
a. is b. is not
- _____ 4. Through the systems effect, Peter’s decrease in output affects which level of behavior?
a. individual c. organizational
b. group d. all three levels
- _____ 5. The scope of study illustrated in this case covers:
a. behavior c. performance
b. human relations d. all three
- _____ 6. The focus of study by Susan is:
a. individual/behavior c. group/human relations
b. individual/performance d. organizational/performance
- _____ 7. The focus of study by Tim should be:
a. individual/behavior c. group/human relations
b. group/behavior d. organizational/performance

- _____ 8. Later that afternoon Tim should:
a. reprimand Peter
b. talk to Peter and tell him not to worry about it
c. bring Susan and Peter together to resolve the problem
d. do nothing, letting Susan handle the problem herself
e. fire Susan
- _____ 9. The major human relations skill lacking in Susan is:
a. being optimistic
b. smiling and developing a sense of humor
c. thinking before you act
d. being genuinely interested in other people
- _____ 10. Tim _____ work with Susan to develop her human relations skills.
a. should b. should not
- _____ 11. Will Peter’s performance increase? If you were Peter, would you increase your performance?
- _____ 12. Have you ever had a supervisor with Susan’s attitude? Assume you are in Susan’s position. How would you handle Peter’s decrease in performance?
- _____ 13. Assume you are in Tim’s position. How would you handle this situation?

/ / / SKILL-BUILDING EXERCISE 1-1 / / /

Getting to Know You by Name

In-Class Exercise (Individual)

Objectives:

1. *A.* To get acquainted with the members of your permanent group and to name the group.
B. To get acquainted with some of your classmates.

AACSB: The primary AACSB learning standard skill developed through this exercise are oral communications and application of knowledge.

2. To get to know more about your instructor.

Experience: You will be involved in a small-group discussion, and one person from each group will ask the instructor questions.

Procedure 1 (2–5 minutes)

- A.* Your instructor will assign you to your permanent group.
- B.* Break into groups of three to six, preferably with people you do not know or do not know well.

Procedure 2 (8–12 minutes)

Each group member tells the others his or her name and two or three significant things about himself or herself. After all members have finished, ask each other questions to get to know each other better.

Procedure 3 (2–4 minutes) Permanent groups only

Everyone writes down the names of all group members. Addresses and telephone numbers are also recommended.



organizational behavior

eighth edition

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chapter 1

Introduction to the Field of Organizational Behavior

learning objectives

After studying this chapter, you should be able to:

- 1-1 Define organizational behavior and organizations, and discuss the importance of this field of inquiry.
- 1-2 Debate the organizational opportunities and challenges of technological change, globalization, emerging employment relationships, and workforce diversity.
- 1-3 Discuss the anchors on which organizational behavior knowledge is based.
- 1-4 Compare and contrast the four perspectives of organizational effectiveness.

A

fter completing an international MBA, Megan Kates joined Anheuser-Busch InBev (InBev), the world's largest brewer, as a brand manager in its Mexican operations. Kates, who previously held a marketing job in Miami for French jeweler Cartier, was assigned the premium European import brew, Stella Artois. Later, she was handed additional responsibilities throughout Mexico for Michelob Ultra and Budweiser. "[InBev] basically handed me a brand and told me to run with it," says Kates. "It's a very lean company."

As one of the world's most admired organizations, Anheuser-Busch InBev has a high-performance culture that continually challenges employees to develop their potential. The Belgium-based brewer instills an owner-like commitment by giving Megan Kates and other staff deep responsibility and autonomy to run their part of the business. "We create restaurant owners, not waiters," explains an InBev manager.

Steve Jobs orchestrated many of the greatest advances in our digital lifestyle and animation film over the past few decades. The cofounder of Apple and Pixar Animation Studios was renowned for his vision and persistence. Yet Jobs emphasized that great achievements also require the power of organizations. "A company is one of humanity's most amazing inventions," Jobs once explained. "It's totally abstract. Sure, you have to build something with bricks and mortar to put the people in, but basically a company is this abstract construct we've invented, and it's incredibly powerful."⁸
 © Tony Avelar/Bloomberg/Getty Images



global connections 1.1

From Commute to Telecommute in Japan

Yui Nishimura moved closer to her husband's workplace when she recently married, but faced a 90-minute commute by train each way to her office in Tokyo. Fortunately, Nishimura's employer, major snack foods company Calbee, allows the investor relations employee to telecommute a couple of days each month. "I don't have to spend time commuting, and I'm now able to focus more on my work," says Nishimura. Currently, only 4 percent of Japanese employees work from home at least one day per week. The Japanese government hopes that 10 percent of Japanese employees will be telecommuting within the next few years.²⁵



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connect

SELF-ASSESSMENT 1.1: Are You a Good Telecommuter?

Telecommuting is an increasingly popular workplace relationship, and it potentially offers benefits for both companies and telecommuters. However, some people are better suited than others to telecommuting and other forms of remote work. You can discover how well you adjust to telecommuting and remote work by locating this self-assessment in Connect if it is assigned by your instructor.



CASE STUDY: ANCOL CORP.

By Steven L. McShane, Curtin University (Australia) and University of Victoria (Canada)

Paul Sims was delighted when Ancol Corp. offered him the job of manager at its Lexington, Kentucky, plant. Sims was happy enough managing a small metal stamping plant with another company, but the invitation to apply for the plant manager job at one of the leading metal fabrication companies was irresistible. Although the Lexington plant was the smallest of Ancol's 15 operations, the plant manager position was a valuable first step in a promising career.

One of Sims's first observations at Ancol's Lexington plant was that relations between employees and management were strained. Taking a page from a recent executive seminar that he attended on building trust in the workplace, Sims ordered the removal of all time clocks from the plant. Instead, the plant would assume that employees had put in their full shift. This symbolic gesture, he believed, would establish a new level of credibility and strengthen relations between management and employees at the site.

Initially, the 250 production employees at the Lexington plant appreciated their new freedom. They felt respected and saw this gesture as a sign of positive change from the new plant manager. Two months later, however, problems started to appear. A few people began showing up late, leaving early, or taking extended lunch breaks. Although this represented only about 5 percent of the employees, others found the situation unfair. The increased absenteeism levels were also beginning to have a noticeable effect on plant productivity. The problem had to be managed.

Sims asked supervisors to observe and record when the employees came or went and to discuss attendance problems with those abusing their privileges. But the supervisors had no previous experience with keeping attendance and many lacked the necessary interpersonal skills to discuss the matter constructively with subordinates. Employees resented the reprimands, so relations with supervisors deteriorated. The additional responsibility of keeping track of attendance also made it difficult for supervisors to complete their other duties. After just a few months, Ancol found it necessary to add another supervisor position and reduce the number of employees assigned to each supervisor.

But the problems did not end there. Without time clocks, the payroll department could not deduct pay for the amount of time that employees were late. Instead, a letter of reprimand was placed in the employee's personnel file. However, this required yet more time and additional skills from the supervisors. Employees did not want these letters to become a permanent record, so they filed grievances with their labor union. The number of grievances doubled within six months, which required even more time for both union officials and supervisors to handle these disputes.

Nine months after removing the time clocks, Paul Sims met with union officials, who agreed that it would be better to put the time clocks back in. Employee-management relations had deteriorated below the level when Sims had started. Supervisors were feeling stressed from overwork and poor interpersonal relations. Productivity had dropped due to poorer attendance records and increased administrative workloads.

A couple of months after the time clocks were reintroduced, Sims attended an operations meeting at Ancol's headquarters in Cincinnati. During lunch, Sims described the time clock incident to Liam Jackson, Ancol's plant manager in Portland, Oregon. Jackson looked surprised, then chuckled. He explained that six or seven years ago the previous manager at his plant had tried a similar initiative with almost the same consequences. The previous manager had left some time ago, but Jackson heard about the earlier time clock incident from a supervisor during the supervisor's retirement party two months ago.

"I guess it's not quite like lightning striking the same place twice," said Sims to Jackson. "But it sure feels like it."

Discussion Questions

1. Discuss the consequences of the time clock removal on Ancol's effectiveness as an organization using any two of the perspectives of organizational effectiveness.
2. What changes should occur to minimize the likelihood of these problems in the future?



WEB EXERCISE: DIAGNOSING ORGANIZATIONAL STAKEHOLDERS

PURPOSE This exercise is designed to help you understand how stakeholders influence organizations as part of the open systems anchor.

MATERIALS Students need to select a company and, prior to class, retrieve and analyze publicly available informa-

tion over the past year or two about that company. This may include annual reports, which are usually found on the websites of publicly traded companies. Where possible, students should also scan full-text newspaper and magazine databases for articles published over the previous year about the company.

INSTRUCTIONS The instructor may have students work alone or in groups for this activity. Students will select a company and investigate the relevance and influence of various stakeholder groups on the organization. Stakeholders can be identified from annual reports, newspaper articles, website statements, and other available sources. Stakeholders should be rank-ordered in terms of their perceived importance to the organization.

Students should be prepared to present or discuss their rank ordering of the organization's stakeholders, including evidence for this ordering.

Discussion Questions

1. What are the main reasons certain stakeholders are more important than others for this organization?
2. On the basis of your knowledge of the organization's environmental situation, is this rank order of stakeholders in the organization's best interest? Should specific other stakeholders be given higher priority?
3. What societal groups, if any, are not mentioned as stakeholders by the organization? Does this lack of reference to these unmentioned groups make sense?



CLASS EXERCISE: IT ALL MAKES SENSE?

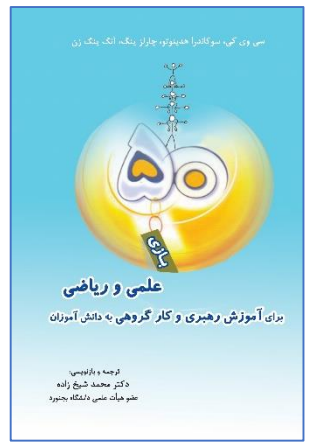
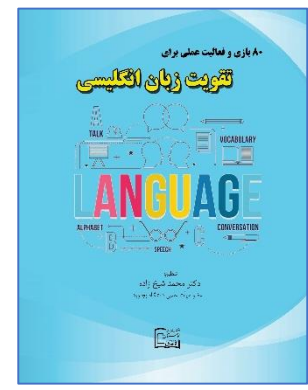
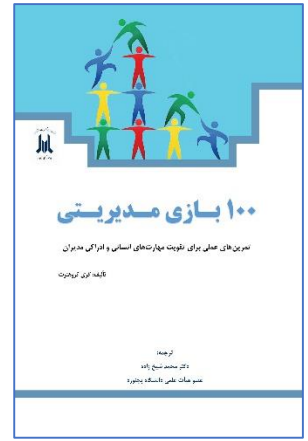
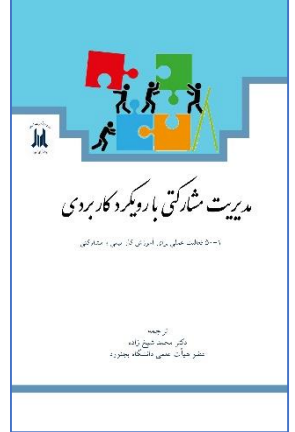
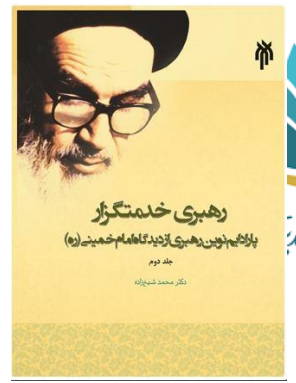
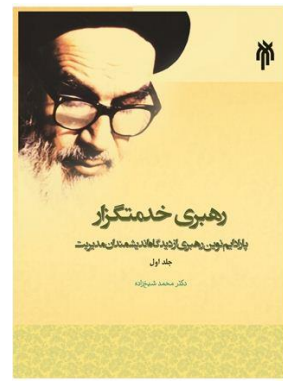
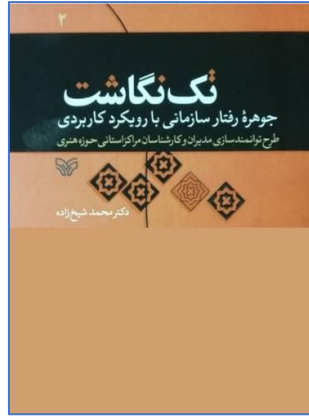
PURPOSE This exercise is designed to help you comprehend how organizational behavior knowledge can help you understand life in organizations.

INSTRUCTIONS Read each of the statements below and determine whether each statement is true or false, in your opinion. The class will consider the answers to each question and discuss the implications for studying organizational behavior.

This exercise may also be conducted as a team activity, whereby students answer these questions in teams rather than alone.

1. True False A happy worker is a productive worker.
2. True False A decision maker's effectiveness increases with the number of choices or alternatives available to her or him.
3. True False Organizations are more effective when they minimize conflict among employees.

4. True False Employees have more power with many close friends than with many acquaintances.
5. True False Companies are more successful when they have strong corporate cultures.
6. True False Employees perform better without stress.
7. True False The best way to change people and organizations is by pinpointing the source of their current problems.
8. True False Female leaders involve employees in decisions to a greater degree than do male leaders.
9. True False The best decisions are made without emotion.
10. True False If employees feel they are paid unfairly, nothing other than changing their pay will reduce their feelings of injustice.





Thank you!

What I hear, I forget.

What I see, I remember.

What I **do**, I **understand**.