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A live-case lite approach as formative assessment

Written case studies have been widely used in marketing. This method presents some shortcomings. We have suggested an approach employing a version of live case studies involving managers of a local company as formative evaluators contributing to an iterative and formalized formative assessment process. This approach may add some interesting features such as presenting a more relevant and realistic context to students as they are more likely to work in that sort of business in the future. It also helps students to deal with ambiguity inherent in business life by conducting a nonlinear, but iterative, learning process. And finally, this process allows the application and understanding of theoretical concepts.

Magali Dubosson and Marilyne Pasquier

School of Management, Institute for Entrepreneurship, HES-SO // University of Applied Sciences Western Switzerland, Fribourg

Introduction

Traditional case study teaching has been widely used in marketing and strategy classes. It contributes to developing students' hard and soft skills. However, it also has some limitations such as its static feature, its limited description of context and its tendency to become outdated. To alleviate these shortcomings, we suggest using a written case study about a local company and inviting its managers as guest speakers. Managers can enrich case discussions with knowledgeable insights and can explain why some options are not chosen. Group presentations are assessed by peer students in order to highlight their strong and weak points. Finally, the instructor will lead a discussion to demonstrate alternative views, to explain the useful tools and concepts to apply, and to link theory and practice. This approach of associating a written case study with guest speakers can be considered a version of a live case study. Moreover, this iterative approach including three kinds of feedback, i.e., from the company managers, from classmates and from the instructor, is used as a formative assessment process.

This paper will firstly review some literature about the use of traditional and live case studies in marketing and the formative assessment process in the context of case study teaching. Then, it will describe the suggested approach and the organization of formative assessment. In the discussion, the authors summarize differences between our approach and traditional case study teaching, and identify some issues that should be addressed when using a live case study as a formative assessment.

Literature review

Trend toward experiential learning

Workplace and business contexts have changed. These changes in jobs require new skills such as problem-solving, teamwork and interpersonal communication. Moreover, student bodies have also changed and become more diverse, and are less prone to passively attend traditional lectures (Kennedy, Lawton, & Walker, 2001). In such a context, new pedagogies have to be developed and applied.

To address these new challenges, researchers and instructors recommend moving from a teacher-centered approach and product-based activity to a student- and process-focused teaching (Kennedy, Lawton, & Walker, 2001). Education should become a matter of facilitating learning (Elam & Spotts, 2004). Even though some business schools, like the Harvard Business School which was a pioneer in the field of case study approach, introduced realism into the classroom very early, in our field, educational institutions have been criticized for emphasizing theory at the expense of practice and experience (De los Santos & Jensen, 1985).

The approach of learning by experience has been named experiential learning (Clark, King, & Jurn, 2012). Many scholars have analyzed, discussed and defined experiential learning which can be defined, for instance, as a strategy:

- Where the student is directly in touch with the realities being studied (Keeton & Tate, 1978)
- Where the student is involved in simulations of real activities (Lang & Evans, 2006; Clark et al., 2012) rather than being passive learners (Mellor, 1991 quoted in Kennedy et al., 2001)
- That provide more concrete experiences to learn conceptual material (Elam & Spotts, 2004).
- When a learner is in an active and immersive learning environment (Hale Feinstein, Mann, & Corsun, 2002).
- When students reflect upon their experience (Frontczak & Kelly, 2000).

According to Culpin and Scott (2012), there is common agreement within the literature that experiential learning can be achieved through practical application and active reflection. Therefore, to enhance students' perceived effectiveness, marketing educators should try to apply experiential approaches by offering learning activities such as live-case projects, student presentations, case competitions (Karns, 2005). These strategies will engage students in active, complex problem solving (Mellor, 1991).

"Studies have found that marketing students tend to prefer active, applied, real-world pedagogies" (Karns, 2005, p. 2). Guest speakers are the most preferred activity, followed by discussion, simulations and client projects (Karns, 1993). Karns (1993) found that contact with the real world (e.g., guest speakers or client projects) is considered to be more concrete and enjoyable, most effective and relatively stimulating. This contact is also seen as requiring more effort. Preference and effectiveness appear to be positively associated with the level of stimulation and relevance to "real-world" application (Karns, 1993).

Skills to be developed through experiential learning

Peter November (1993) suggests that students need to develop a "holistic view, a sense of problem 'interconnectedness,' an ability to solve problems in complex, unstructured situations, and to learn communications and negotiation skills" (November, 1993, p. 3 quoted in Kennedy et al., 2001). More specifically, marketing professionals need to develop specific skills, such as how to identify problems, search out information, analyze, synthetize and evaluation information, and describe solutions in a critical and reflective manner in order to interpret the environment and to make sound decisions regarding customers, competitors, and products/services (Bicen & Laverie, 2009). Moreover, regarding personal skills, marketing students should learn to work efficiently in teams to provide and receive critical feedback (Bicen & Laverie, 2009) and to think critically (Klebba & Hamilton, 2007). Does experiential learning contribute to these pedagogical and professional objectives?

Experiential learning, as a way to learn by doing, is the best way to develop some skills (e.g., giving peers constructive criticism) rather than by simply reading about them (Elam & Spotts, 2004). Researchers have identified the employment-relevant soft skills best developed by experiential learning techniques: critical thinking, problem-solving (Kennedy et al., 2001), creativity, written and interpersonal communication, judgment and analytical skills, along with teamwork (Ballantine & Larres, 2004; Bove & Davies, 2009; Culpin & Scott 2012; Kennedy et al., 2001). Furthermore, students have to learn how to deal with the ambiguity inherent in real-world activities (Nuhfer & Pavelich, 2001). There is some ambiguity in case studies when sources provide contradictory information or some important information is missing (Kennedy et al., 2001).

However, some authors are more reserved. Klebba and Hamilton (2007) think that it is challenging to develop critical thinking skills (such as analysis, application, evaluation, synthesis, and creation) in the classroom through case analysis.

Benefits of case studies

The case study method offers experiential learning opportunities (Forman, 2006) as it fosters learning by doing and "guided discovery under the watchful eyes of an expert" (Markulis, 1985, p. 168). It provides a narrative that "describes an actual situation, a real life example, that involves a decision, a challenge, an opportunity, a problem, or an issue faced by a person or people in an organization and requires the reader to 'step into the shoes' of the key person in the case" (Boulocher-Passet, 2015, p.2). Therefore it contributes to develop a better understanding of management issues (Markulis, 1985) and to bridge the gap between theory and the real-world complexity of business problems (Boulocher-Passet, 2015; Bove & Davies, 2009; Culpin & Scott, 2012).

Specifically, the case method can be used to take into account different perspectives and to consider alternative solutions (Weil, Oyelere, Yeoh, & Firer, 2001), to provide a neutral situation to discuss, to develop self-analysis, independent thinking and confidence (Boulocher-Passet, 2015), and to foster the ability to work in group and train presentation skills (Hassall, Lewis, & Broadbent, 1998), etc. Through case analysis, theoretical material generates new conceptual insights and becomes more relevant by making it more practical (Boulocher-Passet, 2015; Ross, Zufan, & Rosenbloom, 2008).

In brief, case studies are perceived as important by students because they pull together theory, practice and the real world (Weil et al., 2001).

Limits of case studies

Traditional case studies are often seen as overly "static, one dimensional, and inadequate simulations of real-world" marketing problems (Burns, 1990 quoted in Bove & Davies, 2009, p. 230). A persistent criticism is the lack of realism (Markulis, 1985; Wilson, 2008). Written cases are also seen as impersonal and insufficiently documented (Wilson, 2008). In particular, they lack information about the economic, social, political and technological context discussion (Cameron, Trudel, Titah, & Léger, 2012). Personalities and their decision-making styles are also difficult to portray in writing (Markulis, 1985). Finally, they tend to become outdated very quickly (Markulis, 1985; Wilson, 2008).

Case studies are also challenging professors. By guiding students through the case discussion, instructors might unintentionally push their own biases and lead students to solutions in an attempt to demonstrate the validity of the concepts being taught (Greiner, Bhambri, & Cummings, 2003; Markulis, 1985). Instructors also may not have sufficient knowledge to deepen the discussion as it may be limited to the case text and the instructor's teaching notes (Cameron et al., 2012).

Considering all these shortcomings, students may demonstrate a lack of commitment in class discussions (Miner, 1979). Some authors explain it as a lack of maturity, general education and experience of students (Beckman, 1972). Others argue that cases display only preassembled and essential facts that reveal the solution very early. Therefore, it tends to discourage interest, effort and further analysis (; Markulis, 1985). Discussions can also easily be poorly managed and become dominated by a few vocal students and/or degenerate into endless debates (Kelly, 1983; Markulis, 1985).

Live case study as a form of experiential learning

The live-case-study technique is a variant of the case method (Wilson, 2008) with an additional dimension of reality (Markulis, 1985). One of the main differences between live and traditional cases is that students work in a live environment with an organization to solve a real business problem (Burns, 1990; Wilson, 2008) with partial information and under conditions of uncertainty (Corey, 1999; Culpin & Scott, 2012).

"The key ingredient in live case studies is realism. There is a real company with real products, real competitors, real decision-makers, real employees, a real problem" (Burns, 1990, p. 202-203, quoted in Bove & Davies, 2009) and a real deadline (Culpin & Scott, 2012). Real people from the real company actively take part in the process by participating in the case presentation and discussion and by granting access to their owners, managers and/or employees (Markulis, 1985). Students are aware that their analysis and their conclusions will be communicated to business people and not just to the professor (Wilson, 2008). Live case studies are considered to be more realistic and relevant to students (Bove & Davies, 2009) and consequently have a great motivational impact (Wilson, 2008).

For Cameron et al. (2012), the live-teaching case method is a hybrid teaching method that alleviates several of the traditional case method shortcomings while combining the benefits associated with the presence of a guest speaker in class. It transforms the passive guest speaker event into an active one (Cameron et al., 2012). Compared to traditional cases, live cases show positive outcomes for students and companies. In particular, they augment students' interest and learning (Markulis, 1985). However, using live cases increases instructors' workload which is estimated to be around 30 hours per case (Wilson, 2008). It might explain why live cases are still underutilized in most business programs (Kennedy et al., 2001).

Using case study for formative assessment

There are two forms of assessment: summative and formative, even though the distinction between the kinds of assessment is far from sharp (Yorke, 2003). Summative assessment measures student achievement (accomplishments and failures) by grading final work and exams whereas formative assessment aims at improving learning outcomes as part of the ongoing learning process (Bicen & Laverie, 2009). The later focuses on enriching students' understanding of teaching material (Buck & Trauth-Nare, 2009), on transferring knowledge from classroom settings to the business world (Bicen & Laverie, 2009), and on leading to an enhanced learning experience (Bicen & Laverie, 2009). Even though formative assessment should be an essential feature of classroom practice (Buck & Trauth-Nare, 2009), traditionally in academia, we rely on summative assessment (Bicen & Laverie, 2009; Yorke, 2003).

Formative assessment is based on instructors' feedback and comments about students' performance (see Figure 1), i.e., critical information students receive from instructors regarding assignments and exams (Ackerman & Gross, 2010). Feedback can be defined as "information about the gap between the actual level and the reference level of a system parameter which is used to alter the gap in some way" (Taras, 2002, p. 505 cited in Bicen & Laverie, 2009). It is a collaborative act between staff and students (Yorke, 2003). Students expect feedback on their work as they believe that it can help them identify their strengths and weaknesses and improve their future work (Ackerman & Gross, 2010; Hounsell, Slowey, & Watson, 2003).

Feedback can engender a sense of achievement (Ackerman & Gross, 2010). It has to be delivered timely, frequently, and in a constructive, goal-directed way (Bove & Davies, 2009; Wiggins, 1998). However, instructors should be aware that too frequent comments and feedback may have a negative impact, i.e., students may reject or ignore the feedback and/or blame the professor for inadequate performance (Ackerman & Gross, 2010). Moreover, providing individualized formative feedback is "time consuming and can be mentally, emotionally, and physically exhausting" for instructors (Ackerman & Gross, 2010, p. 172). In the context of live cases, feedback from company's managers has a very positive impact on students' motivation (Bove & Davies, 2009).

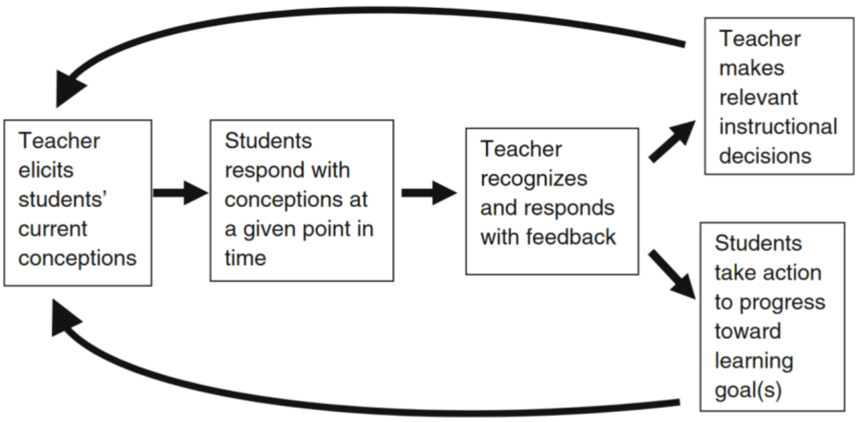

Figure 1. An iterative model of classroom formative assessment (Buck & Trauth-Nare, 2009).

In the next section, we shall explain how formative assessment was imbedded in the use of a "lite" version of live case study approach.

The formative assessment process imbedded in a live-case lite approach

Traditionally, live cases require immersion, i.e., students spend time with the organizations, also on-site. However, this time-consuming immersion may not always be possible, or may be very difficult for instructors and students to organize and integrate into a teaching program (Forman, 2006; Wilson, 2008). Lighter versions of live cases have also been developed and tested. We will present a version of a live case study as applied in our classes and we shall refer to it as "live-case lite", as suggested by Wilson (2008).

Structure of the course

The first task is to identify both the local businesses that might be willing to participate and the issues that might be analyzed and discussed by the students (Markulis, 1985). The instructors have to visit the organization, interview managers and personnel, collect relevant data and write the case study. To ensure that managers will come to class and attend students' presentations, it is better to focus on local small or medium-sized companies. Business people should be carefully chosen for their knowledge of the topic and for their interpersonal and communication skills (Cameron et al., 2012).

When identifying the local businesses, the instructor should have in mind the learning objectives of the course. Issues faced by businesses have to highlight the topics to be developed in class. Cases have to demonstrate how theoretical concepts were applied or should have been applied in a particular context. All case studies are not equally valid or relevant in all contexts.

This paper explains the process followed to discuss a live-case lite study of a local branch of a Swiss nation-wide retail bank, Raiffeisen. This bank is a very interesting and a unique case in the Swiss market. It is the third largest retail bank in terms of its number of customers and turnover. Surprisingly, it is a cooperative company consisting of a dense network of highly autonomous local branches. To become a customer, one has to buy a share of the branch. The original philosophy behind its business was "the money of the village stays in the village". The bank does not invest or operate outside Switzerland, and is very strong in the retail deposit and mortgage market.

The case described the situation of a local branch, the Banque Raiffeisen Moleson (BRM), with 36,000 customers at the end of 2006. At that time, all industry was performing very well with unprecedented increases in productivity thanks to ICT. Globally, the name of the game within the banking industry was cost-cutting, dematerialization, outsourcing, offshoring and new powerful products such as credit derivatives, CDC or CDOs. The whole industry seemed to be recovering so well from the internet bubble and problems following September 11. However—as is well known—this was just before the 2007–2008 financial crisis. Shaken by global turmoil, how should and can a small business react?

In 2006, BRM had to make decisions with important marketing consequences in terms of service offerings and customer segments. The 8-page written case was structured as follows:

- Raiffeisen: organization, structure, mission, data at the national cooperative level
- BRM: organization, structure, data and main actors at the branch level
- Main competitor of BRM—regional bank targeting same customers
- Products/services of BRM
- Customers: demographics, data, profiles and trends
- List of 5 questions related to: (1) determine how to segment the market, (2) identify the current targeted segments, (3) identify future possible segments and the changes to be made in the offerings, (4) identify potential competitive advantages and their related strategic resources (cause and effect relationships), (5) make specific recommendations to BRM.

The written case and the questions are submitted to undergraduate students in their final year as it combines strategy and marketing perspectives. In groups, they answer the questions. Three groups (out of 12 groups) have to prepare a 15-minute presentation to be made in class to their classmates and two managers of BRM, its current managing director and its retail operations manager. Then, the groups' work is evaluated through a formative assessment process (see Figure 2).

A class is structured into three parts across three class sessions. At the first session, instructors explain theoretical concepts and distribute the written case and questions to the students. In between, the students have to analyze the case and answer the questions. Then, the bank managers come to class and participate in the case discussion. Students present their analysis to the managers and their peers. To prepare for the next class, students have to assess their performance and that of their peers. In the last class, students and professors discuss the strong and weak points of each group. Finally, the instructors share their own insights by referring to and applying the theoretical concepts. The instructors take advantage of the iterative assessment process as they can identify the areas that need more attention and they can adjust their closing comments in order to strengthen students' understanding.

Formative assessment process

A variety of formats can keep debriefings lively and meaningful (Kennedy et al., 2001). According to this recommendation, we designed a three-stage formative assessment process, starting with feedback from bank managers, followed by self-assessment and peer-assessment in groups, and finally, by the instructors' feedback and closing comments.

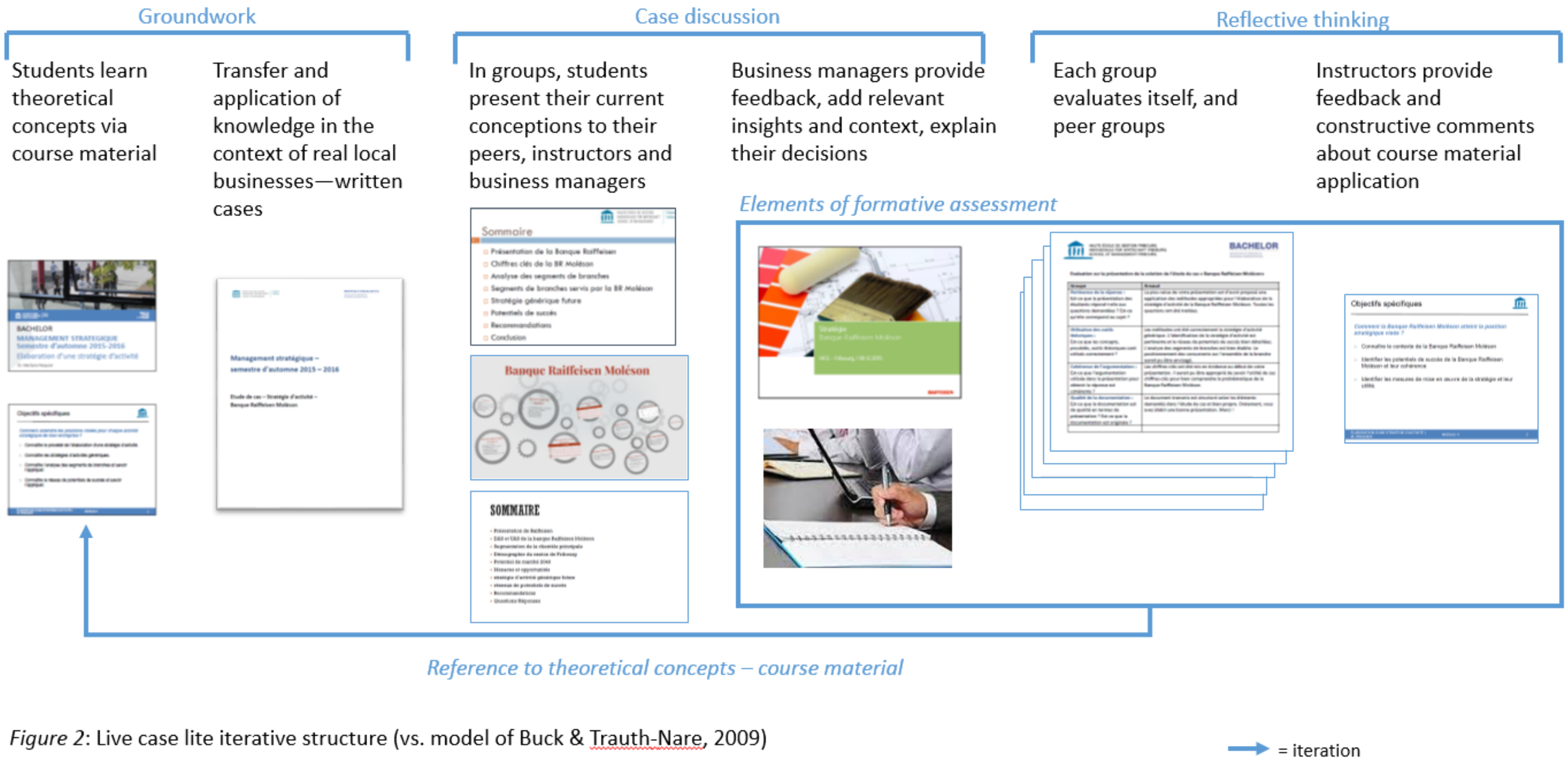

Figure 2: Live case lite iterative structure (vs. model of Buck & Trauth-Nare, 2009)

In class, students present their analysis and recommendations with supporting data and arguments for comments and critiques. Presentation skills are also evaluated.

Feedback from the company

Bank managers attend presentations in class. They take notes and may ask questions to deepen or challenge students' understanding and recommendations. However, the instructors are still running the class and structuring the sessions according to their objectives.

As managers have a specific and extensive knowledge of the situation, they can provide additional information or a different perspective from that of the teachers (Cameron et al., 2012). In particular, they explain why a recommendation was viable, or not, from their perspective. Finally, as an epilogue, bank managers report what they decided and why, what were the consequences of their decision and what is the current situation. This contribution brings "a healthy dose of realism" that is perceived positively the students:

> *I really appreciate working on a "real" local case that is directly associated with the regional business activities. It generates higher students' involvement as they feel more concerned about a situation closer to home rather than about a fictive case from around the world. Moreover, working on a local case is far more reflective of students' future professional realities. It reinforces their commitment. – A student*

> *I was interested in the contribution of BRM. I liked discussing and debating about the case with the managers. Students were proud to have their work acknowledged and recognized by professionals. – A student*

The only recurrent cost to the local bank is a two-hour session in class. The investment cost to the BRM was the interview with the instructors, the selection of data to be transferred and the review of the final version of the written case.

Benefits to the bank are numerous. Bank managers are interested in listening to students' presentations to get an unbiased perspective that may challenge their taken-for-granted assumptions. BRM managers are particularly interested in getting the insights of young and potential future customers; students may shed a different and unexpected light on an issue. As managers of a local branch dedicated to local activities, they feel a social responsibility to support educational events. They may also attract new graduates to apply or new customers.

Research has pointed out some caveats when integrating managers into a class discussion. We observed the same limitations throughout our experience. Local companies, as small or medium-sized companies, may be reluctant to provide some data, in particular financial data as noted by Markulis (1985). Students may be intimidated to challenge some decisions or to present novel or disruptive ideas if they feel that they might be strongly criticized by bank managers, also noted by Markulis (1985). Depending on the personalities of bank managers and on their communication style, discussions may become a one-way patronizing interaction as noted by Cameron et al. (2012). Instructors have to be aware of these potential shortcomings. They have to lead the discussion to stick to the case at hand and to their teaching plan. They have to intervene when they feel that something may go wrong.

Auto-evaluation and peer evaluation

Students are given a list of four criteria in order to assess their own performance and those of their classmates. Students are not evaluated individually, but only in groups. The objective is to develop interpersonal skills, accountability and group leadership as the business environment requires these specific competences (Kennedy et al., 2001).

For each criterion, they have to identify strong points and any aspects that could be improved. Here are the evaluation criteria to be applied:

- Relevance of the responses and of the recommendations: Considering the context of the case, did the responses and recommendations answer the questions asked? Did they understand the ins and outs of the issue at hand?
- Application of tools and theoretical concepts: Did they identify the correct tools and concepts to be applied? Were they used correctly?
- Pertinence of argumentation: Did they provide a detailed reasoning and line of argument? Was the argumentation supported by evidence and data? Was the argumentation pertinent and convincing?
- Presentation skills: Were the written documents well-structured, well-balanced, clear, comprehensive and well-written? Was the presentation well-structured, well-articulated, and supported by agreeable and relevant visuals?

Students came to next class prepared to express their evaluations. We observed that students had difficulties in voicing their opinions. They might not want to upset their classmates or they may be afraid of acts of retaliation, as noted by Bloxham & West (2004).

> *We will raise less negative aspects than positive points. I would rather use an online and anonymous system. Answers would be more truthful. – A student*

Students may not be convinced by the process. They may feel that their peers are not qualified to give valuable and accurate feedback. As such, they consider this assessment as not fair (as noted by (Bicen & Laverie, 2009). Moreover, they feel that it takes time from their leisure time (free time is scarce) and they don't understand the benefits to be gained.

> *I don't understand why we should assess our classmates and our own work. - A student*

Therefore, either this assessment element should be redesigned according to students' comments, or it should be better explained to the students in order to make them understand the objectives in terms of skills development and the benefits to be gained.

Feedback from the professor

Feedback from the professor is a traditional component of any case study discussion. We just want to highlight the iterative loop going back to techniques and concepts explained at first and the mechanism that allows for adjusting the feedback to the aspects of poor understanding revealed throughout the process (see Figure 2). At the end of the process, the instructors can also take the opportunity to focus on and highlight the key issues and concepts. They also can bring their own insights about the application of concepts in a real "local" context and the outcomes.

Students seem to appreciate the iterative process consisting of being exposed to new theoretical concepts and techniques, applying them in the context of a local case study, getting feedback from the managers and finally analyzing their application and reinforcing their understanding thanks to the insights of the instructors. They can put "words and images" to what they have learned.

> *A local case study allows the students to analyze a situation and to take a position on the strategy of the company. It requires us to think about a better solution, or at*

least, about alternative solutions. It provides the opportunity to apply theory (such as segmentation or competitive advantages) to practice in a real local environment. We can rapidly transfer best practices and knowledge. – A student

Discussion

This paper discussed the use of a lite version of live case studies as a formative assessment process. It differs from traditional case studies as it promotes the learning and application of theoretical concepts as an iterative process, rather than as an inductive process as the result of a case discussion. We have identified key differences between traditional case studies and our approach to live-case lite studies (summarized in Table 1).

Table 1
Key differences between traditional case studies and live cases lite

	Traditional case studies	**Live cases as formative assessment**
Source of feedback	Professors	Professors, Classmates and Managers
Theoretical concepts	Resulting from inductive process (mostly at the end of discussion)	Application and understanding throughout an iterative process
Formative assessment	Self-reflection and confrontation with classmates and instructors during discussion	Strong and formalized formative assessment process involving different actors
Degree of realism	Real case	Well-known and experienced real local case, and interactions with "real" and lively managers

We conducted an exploratory research based on semi-directed interviews of students and bank managers involved in our classes. Future quantitative research should be conducted by questioning all students. In particular, we should test the assumption that local live case studies increase students' involvement and learning, that the presence of managers increases the sense of realism and students' motivation, and finally, that the whole process with the iterative adjusted loop back to the theoretical concepts reinforces students' understanding and capabilities in applying theory to practice.

We should also test whether this kind of process resolves the traditional shortcomings of written case studies. In particular, we should assess if ambiguity is better understood as a component of a real business environment and if students feel better or less disconcerted when dealing with uncertainty and a lack of information. Students should understand that there is no unique right answer to business problems and they should expect the instructors to know and provide that kind of answer.

Moreover, by inviting the managers to participate in a case discussion, the instructors are no longer the sole experts. As a guide and facilitator, they should run the class, set the pedagogical objectives, structure the lessons and lead the discussion. They should maintain control and direction of the class while giving space and time to company managers to get their input (Cameron et al., 2012). According to Kennedy et al. (2001), this requires an entirely different set of skills and knowledge.

At the institutional level, this kind of approach should be taken into account and rewarded according to the costs. According to Wilson (2008), the cost to professors to develop a live case is about 30 hours per case. Every academic organization has policies and procedures to acknowledge and record activities and the time of each professor. Colleges use standard methods to credit workload and salaries and they do not recognize extra work dedicated to original and creative initiatives. Faculty members may encounter problems in such rigid organizations (Kennedy et al., 2001). Finally, the question for instructors is to determine whether the benefits of the live case compared to the traditional case outweigh the costs (Wilson, 2008).

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