

Preface

Judgment, Dialogue, and Reality: The Enduring Value of Case Method

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*“For if education may be defined in a word, that word is controversy.
When concord reigns, learning withers; where conflict rules, it flourishes”.*

Donald Moffat, American writer and Harvard graduate, in *Fair Harvard*

After more than three decades of writing and editing case studies and training case writers, I was honored by the editor’s invitation to contribute this foreword to a collection devoted to a method that has shaped my professional life. It also offered an opportunity to reflect on why the case method – despite extraordinary technological change – continues to play such an important role in management education.

Every era must decide which human capabilities are most worth cultivating. In 2026, business schools are preparing leaders for a world in which information is abundant but judgment remains elusive. Leading in this context will require the ability to make difficult choices under extreme uncertainty, support

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teams and employees under duress, and manage organizational boundaries redrawn by AI and digital technology.

While most educational technologies are designed to help learners acquire, retrieve, or produce knowledge, the case method is different. It helps us construct understanding. It does so by demanding and developing three capacities that elude automation:

1. Judgment and understanding what matters,
2. Dialogue and understanding how others see the world; and
3. Proximity to reality and understanding how organizations actually work, rather than how we imagine they work.

These capacities have been central to the method for more than a century and may become even more important. If all three legs are present, a case will bear the weight of classroom engagement and debate. If a single leg is absent or falls short, the method weakens.

This collection extends this centenarian technology into its new century. The case studies that comprise this compendium were written as organizations confront profound technological, social, and managerial change. Like the earliest Harvard Business School cases, they invite readers not simply to learn what happened but to wrestle with decisions whose outcomes were uncertain.

1. A delicate experiment

When it started in the early 1920s, the case method was an answer to a question that confronts us today: How do we prepare people to exercise judgment as the world changes faster than existing knowledge can keep pace?

The then-13-year-old Harvard Business School, still a “delicate experiment”, sought a new way to educate leaders at the dawn of management as a profession. A few years after World War I, society was being transformed by industrialization and urbanization – marked by severe income inequality, stagnant wages for industrial workers, soaring corporate profits, migration from rural to urban areas, and the rise of nativism and xenophobia.

To help them do so, HBS recruited a Harvard Shakespeare scholar by training. Malcom P. McNair joined the HBS faculty in 1920 under a new dean, Wallace B. Donham, and Bureau of Business Research Director Melvin Copeland. Inspired by the case method used at Harvard Law School, Donham and Copeland intended to develop a case-by-case method for studying businesses.

Rather than transmitting knowledge, cases would cultivate judgment through discussion, reflection, perspective-taking, and decision-making. The method was positioned as an alternative to lectures and memorization. That same year, Clinton P. Biddle (MBA 1920) became an early researcher in the Bureau of Business Research.

By 1921, Biddle authored the first case. There is something poetic about the fact that the first Harvard Business School case was *The General Shoe Company*. The case is about labor and management, involving workers leaving a shoe factory 45 minutes early. At the same time, the company struggled to meet orders. Ever since, the case method asks us to try on other people's shoes: to inhabit their circumstances, confront their dilemmas, and make decisions with the information available to them at the time.

McNair subsequently wrote many cases, built courses around them, and taught by the case method. He became known as "the voice of experience". Early cases focused heavily on operations, labor, production, and managerial decision-making. Between 1921 and the early 1930s, HBS transformed the case method from an educational experiment into its signature pedagogy.

In parallel, John Dewey, an American philosopher, psychologist, and educational reformer who taught primarily at the University of Chicago and later at Columbia University, would become one of the founders of pragmatism. This philosophy asks whether ideas work in practice rather than whether they are abstractly "true". His philosophy and the case method both focus on the power of learning by doing; using real-world problems as the basis for learning; developing judgment instead of absorbing facts; learning through discussion and inquiry; and treating knowledge as something tested through experience.

During World War II, the method demonstrated its flexibility as faculty produced hundreds of cases for military training, emphasizing decision-making under radical uncertainty and life-and-death pressure.

In the 1950s, McNair and his colleagues codified the philosophy of the method. They helped spread it nationally and internationally, presenting it as a means of developing independent thinking, democratic leadership, and intellectual rigor through discussion. He noted in 1954: "*A case is really a distinct literary form. It is obviously not a poem. It is not purely a narrative, but it has important elements of narration. It is not purely an exposition. It is not purely argumentation, but it may have important elements of argumentation. It is not just fiction, but [...] it may have an important analogy to a detective story*" [iv].

During the 1960s and 1970s, cases became more numerous, analytical, and

globally oriented as business education expanded. As the business world changed and the curriculum expanded, cases incorporated economics, finance, and quantitative methods.

In the 1980s, the scope of case subjects broadened beyond manufacturing to encompass strategy, entrepreneurship, services, technology, and organizational leadership, reflecting the growing complexity of management. The publication *Education for Judgment: The Artistry of Discussion Leadership*[v] in 1991 consolidated the case method's power to cultivate judgment through dialogue, ambiguity, and engagement with competing perspectives.

Today, the case method is a global enterprise. The Case Centre, the world's largest repository of teaching cases, has more than 500 member organizations worldwide and serves educators across the globe. In the 2022–23 academic year alone, 1,187 organizations in 85 countries purchased cases through The Case Centre for use in their programs. The schools producing and teaching cases now span North America, Europe, Asia, Latin America, Africa, and the Middle East.

In addition, what began in 1921 as a one-page description of a shoe factory labor dynamic grew into a range of teaching materials, including exhibits, spreadsheets, video, audio, and simulations. Today, some cases incorporate digital platforms, interactive exercises, and even AI-enabled tools and avatars that allow participants to engage with synthetic “protagonists” and “stakeholders” and explore alternative paths in real time. Yet despite these technological advances, the fundamental premise remains unchanged. The tools of trade have changed, but participation remains at the center of the pedagogy.

2. From judgment to discernment

In the past 35 years, organizations have invested heavily in technologies that improve access to information, analysis, prediction, and efficiency. What remains difficult is helping people develop the capacity to decide when the data are incomplete, weigh competing priorities, appreciate motivations, navigate ethical tradeoffs, persuade others, understand biases, change course when new information emerges, and act despite uncertainty.

As organizations grapple with the opportunities and challenges of AI, the enduring value of the case method may lie in its ability to develop one of the most important human capabilities: the capacity to exercise sound judgment when there is no obvious right answer. In a world increasingly shaped by algo-

rithms, AI-generated answers, and information abundance, this ability may be more valuable than ever.

In some way, the case method might be the antidote to the so-called “last mile problem” for AI and the hope that the “Human in the Loop” model will enable us to mitigate AI’s risks and harness its promises. The case method is training for that final act of judgment. Put another way, the case method may increasingly be important as an *understanding* technology.

Understanding of organizational dynamics rests on the three capacities of the case method – judgment, dialogue, and reality.

Judgment: A central contention in the cases is that leadership often involves losses, trade-offs, and competing values. Reality is often ambiguous, and cases force choices despite incomplete information. The question is not what is true, but what should be done and what our suggestions reveal about us.

Dialogue: With the right teaching plan, cases should create venues for structured disagreement. Learning occurs through competing interpretations of the same set of facts. The discussion itself and what it reveals about different perspectives is part of the pedagogy and joint discovery. The method relies on others’ voices and their commitment to joint exploration. It requires that participants also feel comfortable disagreeing with each other.

Reality and proximity: The case method is a technology of proximity: to practice, people, consequences, and reality. Cases are grounded in actual people, organizations, and consequences. With their focus on field research and interviews with stakeholders and decision-makers, case studies help preserve the context, ambiguity, and lived experience of decision-makers. They often bring the actual voices of these leaders and with them a glimpse into how they make sense of their reality. Their situations are not average, nor generated, nor composite. They are unique and still pedagogically interesting.

The case method remains relevant because it keeps us close to reality, not just the reality of practitioners but also the reality of how work gets done in organizations: uncertainty, competing interests, human consequences, ambiguity, disagreement, and lived experience. They therefore keep learners close to the realities of organizational life and, in doing so, can better prepare them to succeed once they are actors on the business stage.

In a world that feels increasingly disembodied, the case method also keeps business faculty members connected to the reality of practice. Field cases place researchers at the heart of organizational decision-making through confidential conversations with managers facing real decisions and real consequences that affect real human beings in their firms and far beyond.

3. In the risks lay the promise

Some see the case method as being in competition with or incompatible with modern technologies. Instead, it belongs alongside books and conversation, enduring human technologies that continue to matter because they address fundamental human needs. No matter the time or the format, cases help us learn to navigate complexity together at the edges of expertise.

Doing so, however, requires collaboration, investment, and efforts on the part of both teachers and learners. The case method is not a solitary exercise. Case authors speak with companies and customers, listen to multiple viewpoints, and craft a story that can be understood from several perspectives. In the classroom, cases come alive in conversation. The method therefore requires individual preparation and commitment in pursuit of a collective enterprise, a form of collective sense-making. When it is well executed, a case conversation will enable students to hear different interpretations, experiences, priorities, and values. The discussion itself is the learning and the method that engineers hopefully productive disagreement.

Many of the forces reshaping higher education and organizations today challenge those very conditions – from preparation, conversation, and resource conservation. Among them are reduced individual preparation as AI increasingly summarizes cases and substitutes for the struggle of interpreting complex material on our own. This also reduces the importance of collaborative preparation as study groups become less central to learning. The classroom is affected by a growing reluctance to disagree or express minority viewpoints, limiting the productive tension on which case discussions depend. Similarly, shorter attention spans and increasing expectations for immediate answers rather than sustained inquiry. Finally, the case method is an expensive technology to develop, learn to teach, and teach. It is, like so many other worthy human endeavors, under pressure to privilege efficiency, certainty, and optimization over exploration, ambiguity, and reflection.

None of these developments diminish the importance of the case method. Instead, they clarify its distinctive contribution. As technologies increasingly help us acquire information and generate answers, the case method remains one of the few educational approaches designed to help people tackle complexity together.

4. Beyond the classroom

The case method's deeper contribution may be that it helps us practice the habits required for collective life: engaging in reality, exercising judgment, learning through disagreement, understanding other people, and making decisions whose consequences will be borne by human beings.

A century after *The General Shoe Company* and decades into the age of AI, those capacities remain as important as ever. This collection of cases contributes to the next chapter in the history of the case method. I hope they challenge readers, stimulate discussion, spark new insights, and inspire the next generation of case writers.

With thanks to my colleagues David Lane and Matthew Kelley for their insights.

Endnotes

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