

# Human Resource Case Analysis – The Students’ Perspective

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## Abstract

Case analysis is a powerful teaching tool that requires students to demonstrate the higher-level application, analysis, evaluation, and synthesis skills essential to effective critical thinking. Human Resource Management (HRM) professionals must develop these skills and incorporate them into their day-to-day practices in serving organizations and the employees with whom they work. This paper presents HRM students’ perspectives about ten key factors essential to developing case analysis competencies essential to prepare them for successful careers.

**Keywords:** Case analysis; Human Resource Management skills; Teaching Human Resource Management; Bloom’s Taxonomy; Student partnerships in learning.

## 1. Introduction

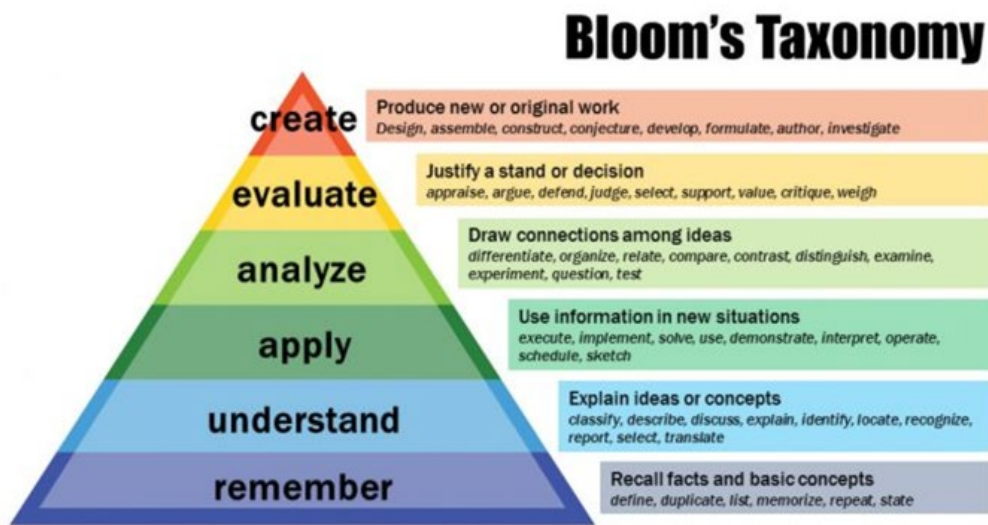
The challenges facing Human Resource Professionals (HRPs) in the 21<sup>st</sup> century are complex and uncertain (Caldwell & Anderson, 2018a) and most HRPs are poorly prepared to both understand and contribute to the strategic success of their organizations (Gomez-Mejia, Balkin & Cardy, 2020). Because the ability to comprehensively analyze the many factors that are critical to the Human Resource Management role is so important (Laursen & Foss, 2003), students who are preparing to be the future HRPs of tomorrow’s organizations must develop advanced analytical skills if they seek to be able to research, analyze, and evaluate the critical factors that will enable them to add value for their future employers (Falleta, 2014).

Great academic institutions such as Harvard University incorporate a case analysis approach to teaching students how to think effectively and the need for business students to identify and apply the refined analytical skills incorporated in case analysis is well documented (Ellett, 2018). The purpose of this paper is to identify and briefly describe key factors essential for successful case analysis for Human Resource Management (HRM) students. The unique value of this paper is that it explains the case analysis method from the perspective of current HRM students who have recently learned to apply case analysis as an analytical tool.

The paper begins by briefly summarizing insights from the business education literature about teaching methods and their contribution to business students’ understanding of important management concepts. That summary confirms the importance of the case analysis approach in helping HRM business students to learn how to identify and evaluate business problems -- skills that those students will need to incorporate if they wish to become successful HRM practitioners following their academic education. Incorporating principles from the Harvard Case Analysis approach, we then identify ten important factors that we suggest can help both HRM students and HRM faculty members who teach today’s business students. The paper concludes by citing well-regarded academic scholars about the importance of helping students to learn and apply the skills that make up the case analysis method.

## 2. Fundamentals of Business Education

Bloom’s Taxonomy is a well-established model used in virtually all teaching contexts because the model identifies a common vocabulary for describing levels of learning required of students of all ages (Armstrong, 2016). Figure 1 identifies the framework of the model and its six levels of learning in the learning process.



Armstrong, 2016

Figure 1. Bloom's Taxonomy

The Bloom's Taxonomy framework applies ideally to the case analysis method. Case analysis for business students asks learners to demonstrate their knowledge and understanding of core business principles and then utilize that information to define key issues and recommendations that resolve problems that mirror real life situations (Yin, 2017). Table 1, provided below, identifies how each of the six steps of Bloom's Taxonomy applies as a valuable resource for developing job-related skills that have practical value for HRM students.

Table 1. Human Resource Case Analysis and Bloom's Taxonomy

Bloom Learning Level	Importance for Case Analysis	Comment
Remembering	HRM students must possess the basic knowledge of the key HRP roles, the core principles associated with their discipline, and the basic steps in analyzing a case problem.	Without a foundation knowledge of core principles, case analysis lacks a proper context.
Understanding	Understanding requires organizing key HRM factors in a logical way. That understanding enables students to apply those factors for a specific case context.	Understanding enables students to see how the factors of HRM are applied to real situations.
Applying	The ability to connect ideas and their relationships by applying that knowledge in a specific situation is essential to case analysis.	Applying knowledge expands its practical value in a specific context.
Analyzing	Analysis involves recognizing the relationships of key elements in a case and finding evidence to support the interpretation of case information.	Analyzing skills demonstrate the ability to understand how concepts relate and to recognize the importance of evidence.
Evaluating	Evaluation involves making judgments about facts, including the ability to use evidence to accurately assess issues and problems facing case participants that need to be addressed.	Accurately evaluating problems and issues requires the capacity to gather relevant information and evidence.
Creating	Case analysis requires the ability to not only correctly define issues but to generate practical solutions based upon relevant evidence that effectively addresses the problems needing to be resolved.	Citing references related to the case factors addresses the problem and confirms the value of the proposed solution.

### **3. Intrapersonal Level of Analysis**

In preparing a case analysis, the Intrapersonal Level of Analysis includes factors within the HRP which motivate her/his performance. “Intra” literally means “within.” At the intrapersonal level, each HRP is concerned with honoring duties owed to others – especially duties owed to the Top Management Team and duties owed to employees (Caldwell & Anderson, 2018). The problem or challenge facing an HRP at this intrapersonal level is to perform her/his responsibilities at the highest professional level – thereby honoring duties owed to others. This intrapersonal commitment to be excellent and ethical serves the organization at the highest possible level and enables the HRP to demonstrate personal competence and moral integrity.

### **4. Interpersonal Level of Analysis**

The primary roles of HRPs involve two critically important obligations. Fundamentally, the HRM purpose involves an ethical responsibility to support the strategic objectives of a firm’s Top Management Team (TMT) in pursuing the mission and goals of a firm (Caldwell, Truong, Linh & Tuan, 2011). As a staff function, HRM supports all of the departments in an organization – and, in so doing, HRPs establish relationships with department heads, supervisors, job applicants, and individual employees who they serve (Gomez-Mejia, Balkin & Cardy, 2020). HRPs also serve as employee advocates (Conaton, 2014) in communicating to TMT members the needs of employees and their response to organizational goals and priorities. At this interpersonal level, a key quality of HRPs is their ability to demonstrate strong interpersonal sensitivity, great tact, and high emotional intelligence in assisting the TMT to achieve its goals (Goleman, 2005). In every case analysis, HRPs must address their obligations owed to others at this interpersonal level.

### **5. Organizational Level of Analysis**

At the organizational level, the HRP role focuses on supporting individuals and departments -- thereby creating value for the firm through achieving its strategic objectives (Conner & Ulrich, 1996). The HRM function supports the TMT’s goals through programs and policies designed to most effectively support employees’ efforts to serve customers and create added value. HRPs help at the organization level by assisting departments to achieve operational efficiencies by job design, improving organizational systems and processes, and providing research and analysis to assist departments (Dess & Sauerwald, 2014). It is in helping organizations to select and retain human capital and to develop employee skills through training and development that HRPs are able to also assist an organization to be more effective in achieving its goals (Becker, Huselid & Ulrich, 2001). In case analysis, the focus on organizational results is at the heart of every case.

### **6. Societal Level of Analysis**

Organizations succeed by adding value to society and to external stakeholders (Porter, 2008). HRPs contribute to creating this added value through the internal support systems that help departments and individuals to improve their ability to integrate organization efforts (Boxall & Purcell, 2011). At the societal level of analysis, HRPs provide their organizations with research about changes in the external environment of the firm and support departmental efforts in gathering information about how the firm can respond to changing customer needs (Caldwell & Anderson, 2018b). By serving as a moral lens for organizations, HRPs also help companies to honor their moral obligations to society (Deckop, 2006; Caldwell et al., 2011). Acknowledging the moral and ethical responsibilities of a firm in honoring duties owed to internal and external stakeholders can enable a firm to strengthen its image and build an image of corporate integrity (Veleva, 2010).

### **7. Defining Problem Statements**

Each of the four levels of analysis impact an organization and its long-term ability to achieve its strategic objectives (Caldwell, 2020). Defining the problems to be solved at each level enables HRM students to recognize the complexity of the factors that they might otherwise overlook (Shakun, 2003). For a case analysis problem in HRM, the central character is the HRP responsible for developing solutions at each of the four levels of analysis. At each level the HRP’s task is to identify the precise nature of the problems to be addressed – incorporating the needs of the individuals involved, the purpose of the organization, and the impacts of organization decisions on internal and external stakeholders. The best possible outcomes sought are articulated in each of the four problem statements at the respective levels of analysis – recognizing that the levels of analysis are ultimately interrelated in pursuing short-term and long-term outcomes that serve the best interests of the organization. An overall problem statement integrates the four separate problem statements in formalizing an overall case objective.

## 8. Articulating Key Issues

For every problem statement at each level of analysis, there are multiple issues that affect the achievement of the desired case outcomes. Those issues inevitably involve scarce resources which must be addressed. If resources are abundant, then problems associated with case analysis would cease to exist. Identifying the issues to be addressed must focus on the purposes articulated in the problem statements at each level of analysis. The great value of identifying the issues at each level of analysis enables an organization to fully understand how each level must be addressed to address the interlocking problem statements (Van Aken & Berends, 2018). Failing to identify key issues that are important to a successful resolution of a problem weakens an organization's ability to ultimately resolve those issues.

## 9. Identifying Realistic Recommendations

Each issue at the four levels of analysis needs to be addressed with a specific recommendation that effectively resolves that issue. Failing to recognize the complexity of an issue and missing their root causes result in predictable failures in resolving those issues (Okes, 2019). The ability to effectively analyze a problem and to correctly identify its causal issues are critical skills which HRM students must demonstrate if they are to be successful in their professional careers (Gomez-Mejia, Balkin & Cardy, 2020). Providing specific evidence that relates to the context of the problems facing a central case figure demands that HRM students develop 1) the ability to interpret information from a case correctly, 2) the insight to accurately define problems at each level of analysis, and 3) the research skills necessary to identify the most viable solutions to resolve the issues which make up the case (Robbins, 2011).

## 10. Documenting Relevant Research

For HRM students, the ability to identify relevant evidence to support the recommendations contained in a case analysis is an acquired skill set. Becoming familiar with the research associated with "best practices" in HRM requires both a breadth and depth of knowledge acquisition. A "one-size-fits-all" approach to management decision-making is often inappropriate when analyzing the best approach to business decisions (Mansfield, 1996; Witcher & Chau, 2010). The ability to research business concepts and to properly apply concepts within the most appropriate context is not only important for HRM business students but is vitally important for practitioner HRP as they advise TMTs and serve as business partners in their organizations (Zikmund, Carr & Griffin, 2013; Hair, Page & Brunsveld, 2019). The practical value of this case analysis skill is an essential skill set of every HRP (Caldwell & Anderson, 2018a) and a key to innovation and competitive advantage (Christensen & Raynor, 2013).

## 11. Developing Writing Skills

Much of the work of HRM requires HRPs to demonstrate the ability to write clearly and effectively (Beaumont, 1993; DeCenzo, Robbins, & Venhulet, 2016). Experience in writing case analyses enable HRM students to develop both critical thinking and writing capabilities. The ability to analyze skills is regarded as a necessary capability of HRPs and is a key element of graduate programs in HRM at major universities (Heneman, 1999; Armstrong & Taylor, 2020). Communicating policies, programs, and practices to employees; documenting key information in job descriptions and other key documents; and explaining the implications of a host of management issues to the TMT demand that HRPs have highly-developed written communication skills (Holland, 2013). Teaching HRM students how to write a clear case analysis and requiring them to develop effective writing skills prepares those students to be perceived as professionals as practicing HRPs.

## 12. Framing an Ethical Decision Model

Virtually every HRM decision involves an ethically-based decision with impacts on individuals (Hosmer, 1987; Schuman, 2001; Pinnington, Macklin & Campbell, 2007). Decisions in HRM are replete with duties owed to stakeholders and HRPs have a moral obligation to be ethical stewards who pursue the best long-term interests of the organizations and its stakeholders (Caldwell, *et al.*, 2011; Caldwell & Anderson, 2018b). The University of Michigan's LaRue Hosmer proposed the ethical model for decision-making, indicated in Figure 2 below.

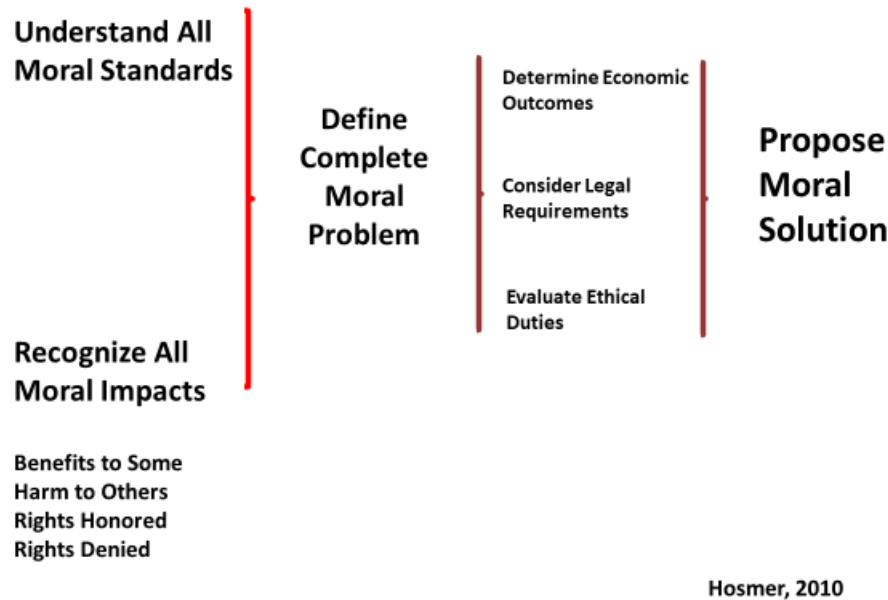


Figure 2. The Hosmer Decision Model

As a resource in HRM case analysis, the Hosmer model enables students to identify the moral, ethical, economic, and legal consequences of HRM decisions (Hosmer, 2010). As important, this model enables HRM students to incorporate all of the factors of case analysis described herein in framing the problems of an HRM scenario, the issues to be addressed, the levels of analysis that are relevant, and the importance of explaining the rationale for proposed recommendations that resolve organizational issues.

### 13. Summary

The challenges facing business schools and the students that they teach are often compellingly difficult. Today's colleges and universities are often asked to teach students who lack proper academic preparation and the accompanying skill sets required to be effective practitioners (Greene & Forster, 2003; Conley, 2008). For more than a decade, academic scholars have roundly criticized the modern business schools for their failure to adequately prepare business graduates for employment as tomorrow's leaders and managers (Pfeffer & Fong, 2002; Mintzberg, 2005).

For the HRM field, where more than two-thirds of working HRM practitioners lack any academic training in their profession at the university level (Gomez-Mejia, Balkin & Cardy, 2020). The ability to develop critical thinking and writing skills to function effectively as HRP's can enable HRM students to prepare for the many challenges of their future professions. For those students, developing the ten factors essential to effective case analysis can enable those students to improve their job skills and enhance their ability to serve their organizations and the world in which they will work.

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