



The strength of the teaching case as a learning tool in Applied Social Sciences in undergraduate education: an experience report

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Abstract

The J&F Institute is an educational organization that uses teaching cases as a method in elementary and high school levels of the technical course in Administration. Building on the success observed in applying this methodology in Basic Education, this ongoing research consists of an experience report to demonstrate how, upon obtaining approval for its Distance Learning (DL) program in Commercial Management, the Institute was able not only to implement the cases but also to engage students in a way that resulted in high satisfaction with the course delivered.

Keywords: teaching case; distance learning; commercial management; experience report.





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Introduction

The J&F Institute is a non-profit organization maintained by the J&F Group, a holding company that encompasses several Brazilian consumer goods companies, such as Friboi, Seara, Swift, Flora, PicPay, Original, among others (J&F Institute, 2025). With a broad and diversified range of action, the Institute has, for 15 years, maintained a school that, in addition to offering basic education, offers technical training in Administration (J&F Institute, 2023).

Over this period, the education at the J&F Institute school has undergone a series of changes. Currently, the model is structure around three pillars: “practical experience”, in which students undertake sales internships at Seara, Friboi, and Flora, as well as internships at Swift retail stores during high school; “Applied *BNCC*,” which seeks to relate the state of the art of the National Common Core Curriculum to the daily context that a company must face; and “teaching cases”, that is, business administration theory is taught according to the case method so that students address real business challenges (Rocha; Motta, 2024; Rocha; Motta; Farias, 2024).

To resolve the proposed cases, professors identify a challenge faced by one of the member companies belonging to the holding company and propose three stages for students to apply the theory in practice: Diagnosis, to prepare a SWOT analysis (Pennington, 2022); Strategy, according to Porter's Generic Strategies (1986); and Action Plan, developed using the 5W2H method by Ishikawa (1985).

Since the method has been well received by elementary and technical school students (Rocha; Motta; Farias, 2024), when the J&F Institute (2023) expanded its activities to higher education, it launched the Commercial Management technology program at J&F College, of which students are sales professionals from all over the country. In this context, the current challenge is: how to continue using teaching cases to teach management techniques in distance learning (DL)? Would this application be possible in remote education?

Based on this questioning, this ongoing research consists of an experience report to demonstrate how, following approval of its Business Management higher education program in the distance learning modality, the Institute manages not only to implement the cases, but also to engage students so that they are satisfied with the course delivered.



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Development

This section is organized into two parts. The first presents brief considerations on the Teaching Case method, highlighting its origins, main characteristics, and applications. The second develops the experience report itself, aimed to describe the practical application of this method as a learning tool in undergraduate education, with particular emphasis on its use in distance learning.

Teaching Case Method: brief considerations

In the Teaching Case method, first used in the Law program at Harvard University, students are presented with a real-world context and they must respond to a challenge or problem (Rocha; Motta; Farias, 2024). Following its initial success, this methodology was gradually applied in the teaching of several other Applied Social Sciences colleges, such as Business Administration. Over time, other institutions, both in the United States and in other countries, also began to incorporate the teaching case as a teaching method.

In Brazil, in particular, business schools have been using teaching cases for several years as an elective subject. Additionally academic journals dedicated specifically to the publication of teaching cases have emerged, such as *GV Casos*, published by São Paulo School of Business Administration of the Getulio Vargas Foundation (FGV EAESP).

In summary, the original concept of the method consists of using reference materials for classroom application, with the aim of improving the training of students as business managers, both in basic education and in higher education (Motta; Lacerda; Wanderley; Santos, 2019; Rocha, 2021a). According to the definition proposed by Alberton and Silva (2018, p. 750), there are three main aspects to be considered in order to constitute a “good teaching case”:

- (a) it includes significant issues; (b) it provides sufficient information to support conclusions; (c) it does not present indications of conclusions, but facts that support reasonable conclusions. We believe that these points are closely related to the case production process. The author should create a description of the situation and dilemma that enables students, during the case analysis process and subsequent classroom discussion, to obtain potential contributions to the development of skills based on an experiential and action-based learning



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process that uses cognitive aspects associated with students' prior knowledge and meaning structures, while also stimulating a reflective thinking.

In light of this understanding and the perceived dissonance in common sense regarding what is learned in “academic settings” versus what is actually found in “real world” work, the Teaching Case proves to be a highly valid active methodology that contributes to the education of students, particularly in Applied Social Sciences, integrating both theoretical and practical aspects for their training and subsequent performance in the job market.

Experience report: the teaching case as a learning tool in undergraduate education

Given that its proximity to companies in the same group enables the J&F Institute to create real and emerging cases, this experience report, which consists of direct contact with the object of study (Marinheiro; Sanches; Archanjo, 2015), aims to share how the cases were carried out in distance learning within higher education. Accordingly, the report was prepared based on access to primary data sources, such as presentations, documents, and interviews with the staff members of the Institute.

Starting with an understanding of the application of the methodology itself, the method has been in use at the J&F Institute since 2021 in regular education (Figure 1), and to be applied, teachers determine a real and current challenge faced by one of the companies within the holding company. To resolve it, teachers propose a series of stages to students—just as an administrator (or “business player”, as they are referred to at the institute) would do when responsible for managing a brand—so that they can apply the theory in practice: Diagnosis, Strategy, and Action Plan. In order for students to advance through each of these stages, teachers teach theories related to each moment, meaning that all theory is taught with context.

Figure 1: Facade of J&F Institute in São Paulo



Source: Collection provided by J&F Institute

In Diagnosis, students work in groups to prepare a SWOT analysis, identifying the strengths, weaknesses, opportunities, and threats of the business (Pennington, 2022), for Strategy, students respond to the diagnosis by applying Porter's Generic Strategies (1986). Finally, for Action Plan they apply Ishikawa's (1985) 5W2H method, which assists in the implementation of the strategies pre-established in the previous stage by defining and executing the activities to be carried out. Still in the Action Plan stage, students are introduced to the Income Statement (IS), which is an essential tool to assist them in making decisions related to financial analysis. At the end, the resulting project developed in response to the challenge is presented to the presidents and directors of the companies at an annual event known as *Congresso de Marcas* (Brand Congress) as reported by J&F Institute (2023).

By adopting and adapting the case method to regular teaching, J&F Institute prepares real cases with contemporary and emerging challenges in different businesses based on its proximity to the companies within the group. To qualify these cases—which are published in the academic journal of the institute, *Repensar* (Rocha, 2021a, 2021b, 2021c; Rocha; Galetti; Motta, 2021)—many of them were presented to professors and researchers in the field of administration at major academic conferences in the area, such as the Administration Seminars (SemeAd), the International Symposium on Management, Projects, Innovation, and Sustainability (SINGEP),



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and the Meeting of the National Association of Graduate Studies and Research in Administration (EnANPAD) (Farias; Rocha; Motta, 2023; Rocha; Motta, 2022, 2023a, 2023b).

Research reflecting on the validity of the application of the method was also developed and submitted to these events, which allowed the quality of the cases to be improved and validated over the years (Rocha; Mola; Motta, 2022). Furthermore, to understand the students' validation of this methodology, since its conception, the method has been rated above 8 (on a scale of 1 to 10) by the more than 1,000 participating students.

According to the excellent evaluations carried out by elementary and technical school students, therefore, as demonstrated by the results gathered by Rocha, Motta, and Farias (2024), the J&F Institute decided to expand its activities to higher education in 2023, maintaining the application of the teaching case. While teaching cases were developed through classroom-based settings in elementary and high school, in the Commercial Management technology program at J&F College, aimed at sales professionals from different regions of the country, the cases were carried out remotely.

It is important to emphasize that the case is chosen in partnership and collaboration between professionals from J&F Institute and the board of directors and presidents of the companies within the group. The primary selection criterion is based on seeking a real case that presents a real challenge of the current moment, which makes the case situated and contextually grounded. This differs from the application of other cases at universities, since they involve challenges that have not only already happened but also have restrictions on data and information due to corporate confidentiality agreements. In the case of the Institute, thanks to the brands and the college being part of the same holding company, students—business professionals—have access to a broad and primary database, which further contributes to their decision-making.

Therefore, following the implementation of the method in the distance learning higher education course, the case in question was introduced as a “video case” in order to make the presentation more dynamic. In this format, students watched a 15-minute video recorded by the director of the company with his team, in which the challenge was contextualized (Figure 2). After watching this video, which is available for on-demand access via the program platform, students were divided into groups of up to five members—considering that there are 150

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students per class—and each group was invited to prepare its response to the case throughout the semester.

Figure 2: Excerpt from the video case study



Source: Collection provided by J&F Institute

To develop their responses, the groups studied, on a monthly basis, the theory related to the stage under development (i.e., Diagnosis, Strategy, and Action Plan). In addition, in order to develop their response, synchronous meetings were held to address any questions once a month. After completing their responses, students submitted their work to the professor in charge, who provided feedback on points for improvement and considerations for the next stage.

At the end of the semester, the groups submitted their final projects, which were given a final grade by the professor in charge. At the end of the period, the professors selected the five best projects, which were presented to the presidents and directors of the companies (Figures 3 and 4) at the *Congresso de Marcas* (Brand Congress). During the event, each finalist received feedback from the evaluation panel, which ultimately chose the best project, awarding it recognition. All the projects were made available to the participating companies so that they could benefit from the suggested ideas, develop their business and address the challenge they faced. The projects were also published on video in the Congress proceedings (College [...], 2025).

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Figure 3: Students and directors at the 1st J&F College Brand Congress



Source: Collection provided by J&F Institute

Figure 4: Students and faculty at the 1st J&F College Brand Congress



Source: Collection provided by J&F Institute



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Finally, in order to understand the students' opinion regarding the application of the methodology, an evaluation was conducted in the first semester of application of the method in distance learning at the college. On a scale of 1 to 10, the students' evaluation score was 9 — this score was both higher than the goal set by the Institute (which was 7) and higher than the one given by students in elementary and high school (which was 8).

Conclusion

This experience report sought to demonstrate that the Teaching Case method can be effectively applied in distance learning. To this end, it is necessary to use different formats for case presentation in order to engage students (e.g., the use of videos), as well as to combine synchronous and asynchronous sessions to monitor the development of the project.

For future studies, we suggest expanding this research by evaluating whether college students continue their learning motivated by the method and, in light of the expansion of the college curriculum, by considering the applicability of teaching cases in other Applied Social Sciences programs. It is also recommended that this experience report be extended in order to better understand the impact of each of the stages - Diagnosis, Strategy, and Action Plan- as well as to understand the effect of this training on the performance of professionals working in the companies of the group. Another possible suggestion is to conduct a comparative study that evaluates the different impacts between the exercise in the format established and made possible by J&F Institute—that is, where brands/companies and the college are integrated—and the application of the Teaching Case method in institutions where this integration does not exist.

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