

# To Teach Leadership or to *Really Train* Leaders?<sup>1</sup>

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Is it possible to teach leadership? If one takes the word “teach” to refer to the transmission of knowledge, then some leaders do not believe that leadership can be taught. Being knowledgeable about a subject is not sufficient to make one a leader. Indeed, to have a “well-filled head,” to borrow Montaigne’s expression, is no guarantee of one’s ability to achieve new and bold goals by mobilizing an entire community or society. One must also have a “well-made head.”

As the word itself implies, leadership is a direction that originates with an individual. Despite what we have been taught, and despite the prevailing “theories” to which we have been exposed or to which we adhere, we actually teach as we are,<sup>3</sup> with all our talents (our gifts and imperfections), our qualities and faults, our strengths and weaknesses, our skills and personal shortcomings. How, then, can leadership be developed? How do we train people to be leaders?

## The case method

One can learn and develop one’s potential. This can be a life-long process, in which any opportunity to learn is seized upon, whether it be training programs, significant encounters, personal or professional experiences, readings, works of fiction, etc. In fact, for a person who is eager to learn and develop their potential, the possibilities for learning are endless and they take full advantage of them. To grow as a leader, it’s all grist to the mill. The case method offers particularly rich potential in this regard, whether one is exposed to it through a formal program or on one’s own.

To state that one “teaches with the case method,” however, is a contradiction in terms, even though this is what one regularly hears from professors who base their teaching on case studies. This contradiction is not entirely innocent. What it implies is that the “pupils” and “masters” who use this method must begin by “unlearning” prevailing modes of teaching and scholarly acculturation that have led them to forget their true nature as “natural learners.” It is this true nature that they must reclaim.

To practise the case method is to train people in the same way that a trainer of a performing artist accompanies the artist in a rigorous, disciplined, delicate process that, beyond the simple mastery of the skills essential to their practice, is finely tuned to the particular learning and learner involved. In both cases, the goal is to help the “pupil” discover his own way of

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<sup>1</sup> A different and much shorter version of this text was published under the title: “The Case for Non-Teaching,” in Klein (ed.), *Interactive Teaching and Learning across Disciplines and Cultures*, WACRA, Boston, 2001, 153-157.

<sup>2</sup> The author would like to thank Bernard Chassé, Ph.D., Pierre-Péladeau Chair in Leadership researcher and post-doctoral fellow, for his contribution and suggestions.

<sup>3</sup> See “Gérer, c’est créer,” published in *Gestion, revue internationale de gestion*, Vol. 30, n° 1, Spring 2005, p. 10-15, and a series of short articles in *Les Affaires*; “On gère comme on est,” Saturday, January 29, 2005, *La Presse*, Special section, p. 4; “Le temps d’un nouveau refus global,” *La Presse Affaires*, Monday, February 28, 2005, p. 5; “L’expertise ne remplace pas l’expérience,” *La Presse Affaires*, Monday, March 7, 2005, p. 5; and “Enseigner sans avoir pratiqué,” *La Presse Affaires*, Monday, March 14, 2005, p. 5.

“seeing,” “reading,” “hearing,” “feeling,” “interpreting,” “expressing,” “doing,” “playing,” or simply “being” – the only way which, for him, will be authentic.

### **Leadership as practice**

Leadership is a practice that is learned for the most part from experience, first that of others, and then one’s own. This learning occurs through action that is enriched by simultaneous or *a posteriori* reflection and that, by dint of repetition, can then be more solidly integrated into the construction of an action that is all one’s own. Leaders are often very interested in the practice of other leaders, finding therein not only a source of inspiration but also of self-discovery. It’s no coincidence that they have a propensity to read biographies and autobiographies.

The case method we refer to here<sup>4</sup> represents an inductive approach to learning that ideally is based on concrete and direct experience or, failing that, on empirical and “lived” material: real-life situations, simulations, “cases,” etc. The basic postulate is two-fold: one learns by doing and by observing the action of others. In fact, all learning inevitably begins with the observation of others, whether they be early role models, mentors, masters, etc. The case method can be accompanied by pedagogical or supporting documents (software, slide shows, theoretical texts, discussion papers) that are read before or after the class session. But for the most part, learning is devoted to practice itself, to the study of the phenomenon, case by case, where one examines the wisdom of the actions undertaken by those who succeed (or fail). Learning is derived from the observation and analysis of what actually happens in real life, and the lessons extracted can then be applied in one’s own practices.<sup>5</sup>

Finding one’s way or one’s own personal style is not as simple as it may seem. And it is precisely this complexity that led to the introduction of the case method, not only in business schools but also in several professional schools (law, medicine, nursing, engineering, architecture, writing and literature, automobile mechanics, etc.) both inside and outside of universities.

One of the reasons this learning method has had difficulty finding its place and even being recognized in universities resides in the confusion existing between “handing down information or knowledge” and “directing learning in a systematic fashion.” This confusion, which is needlessly maintained by ideological debates, is a serious problem because we all know from our experience as professors and students that a body of knowledge is virtual learning and that learning does not occur without the acquisition, whether explicit or implicit, of a precise knowledge.

I have often affirmed that the teacher comes to his task with his qualities and faults, his strengths and weaknesses. Based on my own experience in learning about management and the case method as a teaching approach, as a consultant and teacher trainer, as the manager of a theatre company, and as the founder and director of HEC-Montreal’s Centre for Case

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<sup>4</sup> The cases I refer to are not of the “decision-making” type that can be pertinent in management. Rather, they are based on what Clifford Geertz calls “thick descriptions” of people in leadership positions.

<sup>5</sup> I have produced hundreds of cases that are used in various leadership development programs. The list of these cases is available on my Web page: <http://www.hec.ca/pages/laurent.lapierre/>. All of these cases are deposited with the Centre for Case Studies and most of them can be accessed online at the following address: <http://www.hec.ca/centredecas/>. Simply register and choose a password on the catalogue’s site in order to download cases free of charge: <http://www.hec.ca/centredecas/catalogue/>

Studies, I am deeply convinced of the validity and effectiveness of the case method of teaching, particularly in leadership training.

### **The perspective of the master**

Allow me to begin by stating a fact that bears constant repeating: most of the professors who resist the case method do so simply because they do not believe in it. In my eagerness to try to understand the professors who put up such resistance (as is their right), I have been slow to recognize and accept the full weight of this simple fact. The truth is that this method is not easy to use; it requires strong conviction, special talent and considerable preparation time from professor and students alike. It also presupposes that both professor and students are comfortable with the very idea of learning and of being only indirectly in control of the process. Of course, having been personally exposed to this method as a student helps one recognize its benefits. Learning by the case method does not leave one with the impression (or illusion) of closure one may feel after a lecture course. Rather, it implies a long-term, open learning process that is constantly redefined.

It is probably safe to say there are professors and students who do not have a “natural” affinity for the case method. The traditional scholarly process suits these professors very well, most likely because it suited them earlier when they were themselves pupils and students. I have also noticed that such persons themselves often have trouble learning by doing. As such, they are not inclined to appreciate this type of knowledge acquisition and this pathway to learning enough to devote all the energy, time and efforts it requires. Indeed, people learn in many different ways, and the case method, which is a substitute for practice and direct experience, cannot be considered a panacea, even by a “believer” and “practitioner.”

It can be said, however, that when a person truly believes in the power of this teaching approach, while at the same time recognizing its limitations, that person will be able to trust the learner, not only in relation to a specific learning objective, but also in relation to the process itself of “learning to learn.” He will then be capable of trusting this process of learning through action or through reflection on action and of relying on the rich potential of this inductive approach.

Such a firm conviction changes the professor’s role considerably. And this is what makes some people feel deeply insecure. For the professor, applying the case method means resisting the “natural and legitimate” need to teach and, above all, the propensity to lecture and to strive to make a favourable impression, all of which have been instilled in him throughout his education.

To be a professor is to hold a position of extraordinary power, a power which both professor and student may find seductive. Self-effacement and resisting the desire to impress will not come easily to a professor who is a brilliant performer, especially when it comes to leadership. In ancient Greek, a “pedagogue” was not the person who taught, but rather the person who led the students to the master.

Using the case method in any particular course presupposes being able to count on the availability of a rich bank of cases.<sup>6</sup> There must be a range of cases covering the principal aspects of the learning objectives (for each of the topics proposed for discussion in the

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<sup>6</sup> See note 5.

different sessions). The cases must provide information on the field and sector of activity in question; they must be pedagogically stimulating (readable and interesting documentation capable of sustaining a period of dynamic learning); and they must be topical and up to date. The professor must also be able to draw on a collection of texts containing information, reflections, models or theories that support the acquisition of knowledge in ways that are conducive to self-directed learning. It is not a matter of simply applying a theoretical, abstract discourse to a reality.

The professor's preparation immediately preceding each learning session is of prime importance. He must master the content of the case (teaching skills are best tailored to specific learning objectives), or quickly risk losing all credibility; he must establish a precise teaching approach that is clearly explained in the pedagogical notes included in the case; he must familiarize himself with the teaching tools available and select those that are most appropriate (tables, slides, Internet sites, etc.); he must decide what contributions might be expected from students (opening discussion, individual opinions, team opinions, etc.); he must remain a flexible and dynamic observer so as to take advantage of serendipitous moments;<sup>7</sup> and he must know how to draw conclusions and wrap up the discussion<sup>8</sup> in order to create the pleasant impression of having laid the final plank in a springboard for further learning.

Just as crucial, however, is the professor's earlier groundwork, which requires a deep reflection on his new role. Among other things, he must learn to let go of the very idea of teaching; to trust his students' desire to learn; to trust the process of learning through action or substitutes of action; to trust his material; to listen (be attentive to questions, discoveries, wonder, silences, interest, boredom, etc.); to let people talk and encourage them to talk; to give the group time to reflect and "listen to their thinking" as a group; to develop dynamic teaching skills in order to feel more comfortable and competent; and, finally, to realize and accept that these things take time. In fact, learning to use the case method can itself be a life-long process.

Unless there is serious and rigorous preparation on the part of both professor and students, the case method is doomed to failure. Participants in a training session based on the case method do not come to class to take notes. Students accustomed to spending their time in class with their nose buried in their notebook or computer may feel somewhat insecure when faced with the case method approach. Indeed, contrary to what they were always told at the primary, secondary and collegiate level, and even in some university courses, notes are taken before and after the class. They are there to actively participate in a learning session (a sort of happening). The professor organizes the period: he orchestrates the timing and transitions and introduces the appropriate techniques, technologies, logistics, etc. C. Rolland Christensen<sup>9</sup> liked to say that the professor who works with cases can be compared to a stage manager or even an usher, whose job is to see to the comfort of the participants and the concrete aspects of the session.

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<sup>7</sup> "Good things come to those who wait." (Pierre Laurin, former director of HEC Montréal, used this aphorism often in his MBA leadership courses.)

<sup>8</sup> "The end crowns the work" according to ancient Latin (*Finis coronat opus*).

<sup>9</sup> "Apprendre peut devenir très amusant – C. Rolland Christensen et la méthode des cas," Centre de cas, HEC Montréal, 9 99 1995 001, 21 pages. English version: "Learning Can be Fun. C. Rolland Christensen and The Case Method," in Klein (ed.), *Interactive Teaching & Emerging Technologies*, WACRA, Boston, 1996, p. 219-231.

The use of teaching tools such as tables, slides, PPT presentations, and Internet sites must not be an end in and of itself. Rather, these tools must be worked in seamlessly, without disrupting the process or creating uneasiness. The professor must strike a paradoxical balance between preparation and improvisation and moderate the group effectively so as to ensure that all participants have their fair share in the discussion. A session is like climbing a mountain toward the lesson or lessons proposed, and this climb must be carefully prepared and led. Establishing links with past and future sessions, mapping the learning territory still to be covered: these are true skills in synthesis-making that students learn from the professor by example.

People who do not really believe in the case method find many ways to justify their reticence. There is the attitude which consists in labelling the case method “easy” and then failing to do what is required to make it work. Then there is the attitude which consists in finding it too difficult and then failing to make any attempt to learn how to make it work. The teacher who wishes to work with cases must avoid a multitude of pitfalls: failure to master the skills required because of their unsuspected complexity; failure to offer a rich diversity of learning situations and materials; failure to prepare oneself mentally and concretely for a learning process; failure to remember that the form and content of material are inseparable; inability to spark and sustain the group’s interest; failure to take individual differences and levels of maturity and motivation into account; failure to respect the lack of interest in learning on the part of some, etc. To become truly skilled in the use of the case method requires patience, mental preparation, a willingness to learn from colleagues (watching them teach), developing one’s own competence, daring to find new approaches and to learn the tricks of the trade, and producing or seeking out appropriate teaching materials, etc.

It should be noted that the case method does not exclude the possibility of the teacher giving a more formal lecture now and again in order to transmit certain technical or theoretical concepts relevant to situations of learning by action.

### **The perspective of the learner**

There are students who have succeeded well in their studies based on traditional methods of learning. While all well and good, this same “scholastic success” may in fact be an obstacle to learning through action. Indeed, if these students have found their “scholastic facility” gratifying, they will not be inclined to appreciate learning through action. I have even had the occasion to meet students who had no idea what real learning was all about and who felt that learning was a waste of time or an activity which was not up quite up to university standards.

I have noticed a difference in learning styles between students of Anglo-Saxon background, who are comfortable with an inductive learning process based on empirical material, and students of Germanic or Latin background, who are much more comfortable with a deductive learning process using concepts, models, theories, and processes which are later applied to real situations. But I have also noticed that, no matter what the student’s cultural background, if an inductive, “experiential” learning session is based on rich empirical material and competently led, it will very quickly bring to the fore the same natural talent for independent learning, regardless of the participant’s education, cultural origin or sex. When you scratch the cultural veneer, the universal human nature very quickly appears, with its spontaneous propensity for learning. Sadly, the school milieu can stifle this natural propensity in some students.

The case method presupposes that the students or participants are well prepared. The teacher's prime responsibility is to encourage them to invest in the learning objectives proposed by drawing on their natural desire to know and learn. When the material proposed is rich and relevant, when the suggested readings are stimulating and enlightening, when the classroom learning process is designed to spark interest and facilitate discovery, students will appropriate the process and develop independent learning skills, or what I call "learning to learn."

### **Learning leadership and writing one's own cases**

As I wrote earlier, leadership is a direction that originates with an individual and that comes from inside that person. Each of us has at least an intuitive idea of what leadership is and of what type of people can be qualified as leaders. For example, there is universal consensus that communication is a key component of leadership. Speaking is a means of communicating with others, with an individual, a group, a crowd of people, etc., whereas writing is a more solitary activity. Writing is more introspective than speaking. Even when writing only for oneself, one must organize, structure and fine tune one's thoughts. Personal writing involves even greater commitment and risk.

Most of the leaders I've studied have turned to writing at one time or another in their lives. Like artists and authors, many of them carry "notebooks" with them which they use to sketch out not only work documents, but also deeper, more personal, and often secret reflections. "If people only knew!" they often say to me. But people rarely do...

In the leadership training programs that I lead, I ask participants to compromise themselves by producing two short documents in the form of case studies. In the first, they are required to describe an individual that they personally regard as a leader. It can be a famous leader (Kennedy, Mao, Gandhi, Churchill, De Gaulle, Mandela, etc.) or an unknown figure (boss, uncle, grandparent, etc.). The choice they make is not entirely innocent. In their second text, I ask them to describe themselves as leaders. They have to write about themselves in the third person, using a different first name, which allows them to take a step back. Both of the documents are short (1,000 words), forcing the participants to get to the heart of the matter. These two types of "case study" can serve as the material around which a session is built. For the person who wrote one of these "cases" and who volunteers it for use in class, as well as for the others present, these sessions can constitute rich and instructive happenings.

Teachers must not be afraid to be demanding of students when it comes to preparing cases (answers to preparatory questions, reading the supporting texts, written opinions to be handed in before discussions, preparatory discussions in small groups if required, etc.). I've said it before, but it bears repeating: experience has taught me that the case method will work only if the professor believes in it strongly enough to make it interesting and challenging for students. If he does not, he will inevitably find himself obliged to spend his sessions either playing catch-up or scolding or lecturing his uncomprehending students. If the students are well aware of the demands exerted on the professor by the case method of teaching, they can easily turn those reproaches against him.

### **By way of conclusion**

The message of this text is a very simple but crucial one. Leaders cannot be found on every street corner. This is probably a good thing, since a world full of leaders, and visionaries to

boot, would be unbearable. People who claim most loudly to be visionaries are usually the least visionary, or else they are visionary in a poorly adapted or sometimes even outrageous manner, or in a manner designed to give the appearance of following the latest trend. Nothing is perfect.

In order for the case method to produce the results sought, the professor wishing to use it must truly believe in it. This means he must be ready to provide all the conditions needed to make it work: notably, he must place the learner at the centre of the learning process; provide the learner with rich empirical material, supporting texts and documents that allow quick access to the information and knowledge prerequisite to or underlying the learning proposed; and create a learning climate conducive to complete confidence, by insuring that time spent is not time lost but part of an inductive learning process which takes time but produces results.

There is a comprehensive intelligence – that component of natural intelligence which serves as the basis for management decisions and which can never be replaced by artificial intelligence. It is this kind of intelligence that the case method is designed to discover, to develop, and to nourish.