

當代企業策略

Contemporary Business Strategy (MBA, Fall 2024)

General Information

Date: September 9, 2024~ January 6, 2025

Time: Monday 14:10~17:00

Venue: 管 A103

Instructor: 陳建男  cn_chen@gms.ndhu.edu.tw

 03-8903036

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Office Hour: 管 C407 Tuesday 10:00~12:00 or by appointment

Course Description and Objective

策略管理的基本目的，在於使經理人認知企業可能的獲利來源，以追求企業的長期績效和可持續發展。簡言之，這包含對於企業外在環境中機會 / 威脅的辨識，以及對於企業本身優勢 / 劣勢的確知，並據此設計、執行能充分實現這些潛在利潤或績效優於競爭對手的策略。它關乎的是企業的長期發展、資源的承諾，同時也牽涉到各功能領域的協作。

因此，本課程的目標，不僅在於教導學生瞭解策略管理的核心概念、架構，以及工具，以作為學生進行策略性分析的基礎；同時，課堂上也輔以不同產業與企業個案的研討，使同學熟悉如何將課堂所教授的學理架構，適切地應用至企業場域中，藉此培養同學在面對現實、複雜的企業問題時，具有擬定策略與問題解決的能力。

本課程在結構上主要分為三個部份：

1. **產業分析與競爭優勢**。提供事業層級策略的基本學理和分析架構，包括產業分析與策略的關連、企業策略定位的邏輯、競爭優勢的來源與維持，以及科技產業競爭策略等議題。
2. **成長策略及多事業部組織管理**。提供公司層級策略的基本學理和分析架構，包括垂直整合、多角化等企業成長議題、企業創造綜效的營運邏輯，以及在全球化的背景下，企業的國際化策略。
3. **策略執行**。探討企業的組織結構、控制系統、運作程序、及企業倫理等議題。

Course Organization and Requirements

1. **課程參與**：除了教師的口授之外，本課程的學習重心在於學員的參與、互動與實踐，因此，教師相當重視學員的『課堂參與及貢獻』以及『小組團隊的運作』。課堂上，我們鼓勵有建設性貢獻的主動發言及分享；此外，我們也相當重視學員身為團隊成員的表現與反思。

2. **小組學習**：全班以四人為一組，分組完成文獻簡報、個案研討，以及期末報告等任務。

※ **文獻簡報**：本學期每一組必須完成「**二篇文獻**」的導讀工作。簡報電子檔須於負責報告的**前一天晚上 10 點以前** email 給老師和助教，檔名格式為組別_Reading#，如「**G1_Reading1**」。各組簡報時間以 20 分鐘為限，並由班上同學針對該組簡報內容進行評分。

※ **個案研討 (Case Study Write-ups, CSW)**：本學期將研討 **5 個個案**。其中 **CSW1** 為個人作業，每位同學需針對該個案繳交個人書面報告，其餘個案則以組別為單位，每組必須在個案研討當週上課時繳交書面報告，封面上需有組員的**親筆簽名**，無簽名者以缺交紀錄。報告以 **A4 紙張 4 頁**為建議的上限 (不含封面、圖表與附註頁)，電子檔須於**上課前一天晚上 10 點以前** email 給老師，並上傳至東華 e 學苑課程網頁，檔名格式為組別_CASE#，如「**G1_CASE2**」，紙本則於上課時繳交，**逾時概不受理**。

※ **公司策略模擬 (Corporate Strategy Simulation, CSS)**：本課程將採用 *Interpretive Simulation Corporation*(<http://www.interpretive.com>)模擬軟體，讓各組同學經營一家擁有三個策略性事業單位的公司，並制定與公司層級策略相關的決策。期末各組於**第 17 週(12/30)**進行總營運績效報告(Corporation Performance Review)，簡報電子檔請於前一天晚上上傳至東華 e 學苑課程網站。

3. **期中考試**：考試旨在測試同學，對重要觀念、理論架構、以及教科書內容的理解程度，以作為衡量個別差異之依據。

4. 本課程酌收講義材料費及個案使用授權費，每人新台幣 500 元，多退少補。

Grading

☑ Class participation and contribution	10%
☑ Midterm	20%
☑ Reading presentation	20% (adjusted by peer-rating)
☑ Case write-ups	30% (adjusted by peer-rating)
☑ Final Report	20% (adjusted by peer-rating)
※ If your absence reaches four times (including) above, your grade of this course would be below “B.”	

5. AI Policy

Students are expected to use generative AI to complete assignments. When using generative AI, students must include the complete conversation with the AI and its output. Failure to include the complete AI conversation will result in a 50% deduction of the assignment score. Due to the persistent issue of AI hallucinations, if students do not verify the accuracy of the AI-generated content and errors are discovered by the instructor or teaching assistant, the assignment score will be 0.

Learning Materials

☑ Suggested Textbook

Grant, R. M. 2018. *Contemporary Strategy Analysis* 10/e, Blackwell.

Hill, C. W. L., & Schilling M. A. 2023. *Strategic Management: An Integrated Approach*, 14th Ed, Cengage Learning. (中譯本：策略管理·朱文儀及陳建男(譯)·2024·華泰文化。)

☑ Readings (for group presentation)

1. Mankins, M., & Gottfredson, M. 2022. Strategy-Making in Turbulent Times A dynamic new model. *Harvard Business Review*, 100(9-10): 60-69. (在動盪時代制定與時俱進的策略)
2. Collis, D. J. 2021. Why do so many strategies fail. *Harvard Business Review*, 99(4): 82-93. (策略為何失敗?)
3. Brandenburger, A., & Nalebuff, B. 2021. The rules of co-opetition. *Harvard Business Review*, 99(1): 48-57. (與競爭者共舞·盤點與競爭對手合作的風險與益處)
4. Edelman, D. & Singer, M. 2015. Competing on customer journeys. *Harvard Business Review*, 93(11): 88-95. (善用大數據翻轉銷售)
5. Laurie, D. L., Doz, Y. L., & Sheer, C. P. 2006. Creating new growth platforms. *Harvard Business Review*, 84(5): 80-90. (另闢成長蹊徑)
6. Anand, B. N., & Collis, D. J. 2024. Why multibusiness strategies fail and how to make them succeed. *Harvard Business Review*, September–October. (多事業策略哪裡出了錯?)

☑ References

陳明哲·2008·動態競爭策略探微：理論、實證與應用·台北：智勝。

陳威如與余卓軒·2014·平台革命·商周。

湯明哲·2011·策略精論－基礎篇·旗標。

湯明哲·2011·策略精論－進階篇·旗標。

Bossidy, L., & Charan, R. 2002. *Execution: The Discipline of Getting Things Done*. (中譯本：執行力：沒有執行力·哪有競爭力(最新修訂版)·李明譯·2012·天下文化。)

Helmer, H., & Hastings, R. 2016. *7 Powers: the foundations of business strategy*. Hamilton Helmer. (中譯本：7大市場力量：商業策略的基礎·李芳齡譯·2022·商業周刊。)

Mintzberg, H., Ahlstrand, B. W., Ahlstrand, B., & Lampel, J. 1998. *Strategy Safari: A Guided Tour through the Wilds of Strategic Management*. Simon and Schuster. (中譯本：策略巡禮·林金榜譯·2003·天下文化。)

Rumelt, R. P. 2012. Good Strategy/bad Strategy: The Difference and Why It Matters. Currency. (中譯本：好策略·壞策略·陳盈如譯·2013·天下文化。)

Rumelt, R. P. 2022. The Crux: How Leaders Become Strategists. Profile Books. (中譯本：好策略·壞策略·李芳齡譯·2022·商業周刊。)

Parker, G. G., Van Alstyne, M. W., & Choudary, S. P. 2016. Platform Revolution: How Networked Markets are Transforming the Economy--and How to Make Them Work for You. WW Norton & Company. (中譯本：平台經濟模式：從啟動、獲利到成長的全方位攻略·李芳齡譯·民 105·天下。)

Schedule

No.	Date	Topic	Reading, Case, & Task
1	9/9	◆ <i>Course Orientation</i> ◆ The Concept of Strategy (Ch 1)	⊕ 確定分組
2	9/16	◆ Goals, Values, and Performance (Ch 2)	⊕ Reading 1
3	9/23	◆ Industry Analysis (Ch 3 & 4)	⊕ CSW1: 自家網站開賣？亞馬遜代銷？ (個人作業)
4	9/30	◆ 自主學習 (停課)	⊕ 10/26 專題講座 (憑學習單加分)
5	10/7	◆ 模擬軟體講解與操作	⊕ 借用電腦教室
6	10/14	◆ Industry Analysis (Ch 3 & 4)	⊕ Reading 2
7	10/21	◆ Resources and Capabilities (Ch 5)	⊕ CSW2: HSC vs. NutraSweet
8	10/28	◆ Sources of Competitive Advantage (Ch 7)	⊕ Reading 3
9	11/4	◆ Competitive Dynamics (Supplement)	⊕ Reading 4
10	11/11	◆ Mid-term Exam	
11	11/18	◆ Technology-based Industries (Ch 9) ◆ Platform Strategy (Supplement)	⊕ CSW3: The Video-Streaming Wars
12	11/25	◆ Vertical Integration (Ch 11)	⊕ Reading 5
13	12/2	◆ Diversification Strategy (Ch 13)	⊕ CSW4: Xiaomi
14	12/9	◆ External Growth Strategies (Ch 15)	⊕ Reading 6
15	12/16	◆ Global Strategy (Ch 12)	⊕ CSW5: Jollibee Foods
16	12/23	◆ Implementing Strategy (Ch 14)	⊕ CSW6: Governance and Sustainability at Nike
17	12/30	◆ Corporation Report / Peer Evaluation	
18	1/6	◆ 彈性補充教學	

註：以上內容隨課程進度如有任何調整將會在課堂上宣布。

☑ Additional Readings

- Campbell, A., Goold, M., & Alexander, M. 1995. Corporate Strategy: The quest for parenting advantage. *Harvard Business Review*, 73(2): 120-132. (企業策略：探求養育優勢)
- Collis, D. J., & Montgomery, C. A. 2008. Competing on resources, *Harvard Business Review*. 86(7/8): 140-150. (資源競爭)
- DalleMule, L., & Davenport, T. H. 2017. What's your data strategy. *Harvard Business Review*, 95(3): 112-121. (架構你的資料策略)
- Fisher, M., Gaur, V., & Kleinberger, H. 2017. Curing the addiction to growth. *Harvard Business Review*, 95(1): 66-74. (戒掉迷戀成長症)
- Furr, N., & Snow, D. 2015. The Prius approach. *Harvard Business Review*, 93(11): 102-107. (駕馭破壞式創新)
- Gulati, R. 2018. Structure that's not stifling. *Harvard Business Review*, 96(3): 68-79. (網飛讓組織架構自由)
- Hagiu, A., & Wright, J. 2013. Do you really want to be an eBay? *Harvard Business Review*, 91(3): 102-108. (別急著當 eBay)
- Jacobides, M. G. & MacDuffie, J. P. 2013. How to drive value your way, *Harvard Business Review*, 91(7/8): 92-100. (駕馭你的價值鏈)
- Jacobides, M.G., & Reeves, M. 2020. Adapt your business to the new reality, *Harvard Business Review*, 98 (5): 74-81. (啟動新常態應變大計)
- Kachaner, N., Stalk, G., & Bloch, A. 2012. What you can learn from family business. *Harvard Business Review*, 90(11): 102-106. (家族企業教我們的事)
- Kim, W. C., & Mauborgne, R. 2004. Value innovation: The strategic logic of high growth. *Harvard Business Review*, 82(7-8): 172-180. (邁向價值創新)
- Kim, W. C., & Mauborgne, R. A. 2015. Red ocean traps. *Harvard Business Review*, 93(3): 68-73. (紅海陷阱)
- Kotter, J. P. 2012. Accelerate!, *Harvard Business Review*, 90(11): 44-58. (加速應變策略)
- Kumar, N. 2006. Strategies to fight low-cost rivals. *Harvard Business Review*, 84(12): 104-112. (突破殺價紅海)
- Malnight, T. W., Buche, I., & Dhanaraj, C. 2019. Put purpose at the core of your strategy. *Harvard Business Review*, 97(5): 70-78. (成功企業如何重新定義事業)
- Martin, R. L. 2016. M&A: The one thing you need to get right. *Harvard Business Review*, 94(6): 42-48. (完成超完美併購)
- Martin, R. L. 2021. It's time to replace the public corporation. *Harvard Business Review*, 99(1): 34-42. (上市公司該汰換了)
- McGrath, R.G. 2013. Transient advantage. *Harvard Business Review*, 91(6): 62-70. (化瞬間優勢為永恆)
- Neilson, G. L., Martin, K. L., & Powers, E. 2008. The Secrets to successful strategy execution, *Harvard*

- Business Review*, 86(6): 60-70. (讓策略動起來)
- Oberholzer-Gee, F. 2021. Eliminate Strategic Overload. *Harvard Business Review*, 99(3): 88-97. (別讓公司策略超載！)
- Porter, M. E. 1996. What is strategy? *Harvard Business Review*, 74(6): 61-78. (策略是什麼)
- Porter, M. E. 2008. The five competitive forces that shape strategy, *Harvard Business Review*, 86(1): 86-104. (波特新論競爭五力)
- Ramachandran, J., Manikandan, K. S., & Pant, A. 2013. Why conglomerates thrive (outside the U.S.). *Harvard Business Review*, 91(12): 110-119. (新興市場企業新風潮)
- Scoblic, J. P. 2020. Learning from the future. *Harvard Business Review*, 98 (4): 37-47. (向「未來」學習：讓你的想像力制度化)
- Suarez, F. F., & Montes, J. S. 2020. Building organizational resilience. *Harvard Business Review*, 98(6): 47-52. (建立組織復原力)
- Van Alstyne, M. W., Parker, G. G., & Choudary, S. P. 2016. Pipelines, platforms, and the new rules of strategy. *Harvard Business Review*, 94(4): 54-62. (平台經濟新遊戲規則)
- Zenger, T. 2013. What is the theory of your firm? *Harvard Business Review*, 91(6): 72-78. (說得出道理的好公司)

Supplemental instructions

國際商管認證說明：學院使命、教育目標、學習指標

在 AACSB 國際商管認證的諸多環節中，學習成效確保 (Assurance of Learning, AOL) 可謂其重中之重的一部分。AOL 可概述為設計或檢討出一套有效的學習成效評價體系，透過全院師生的共同努力，試圖將學生的教育成效提升至與學院的教育使命 (Mission) 和各學制與系所的教學目標 (Learning Goals) 和目的 (Learning Objectives) 一致。其中，學院的教育使命與各學制與系所的教學目標和目的環環相扣、緊密連結，並以精心選出的種子課程評測同學的學習成效是否達到所對應的目標與目的。

以下為國立東華大學之學院使命以及本課程所對應之學習目標與目的

AACSB information: College Mission, Learning Goals, and Learning Objectives College Mission The College of Management (COM) emphasizes internationalization, education, and localization, which shapes its mission to cultivate outstanding management and academic talents who are aware of the impact of globalization and ethical issues and can integrate a diversity of knowledge and possess the analytical decision-making and execution abilities to build a brighter future. Students can achieve the five learning goals derived from the school mission, including LG1-integration of a diversity of business and management knowledge, LG2-analytical decision-making ability, LG3- execution, LG4-global vision, and LG5-ethics.

This course covers essential topics in the field of **strategic management** to help graduate students achieve **LG1**, which is measured by the **LO 1.1** and **LO 1.2** and **LG4**, which is measured by the **LO 4.1** and **LO 4.2**.

Learning Goal (LG1): Advanced knowledge of business and management

Learning Objectives (LOs): 1.1 Equipped with the advanced knowledge of a specialization or profession; 1.2 Be able to utilize professional knowledge to provide solutions to managerial problems.

Learning Goal (LG4): Global view

Learning Objectives (LOs): 4.1 Determine the impact of globalization on the markets; 4.2 Equipped with the sensitivity of cross-cultural management.

Measurement: The evaluation of the learning effectiveness of the course includes several parts.

LO 1.1 will be measured by the end-of-term assessment (final exam).

LO 1.2 will be measured by the end-of-term assessment (final exam).

LO 4.1 will be measured by the case discussion and commentary write-ups on globalization of an

assigned teaching case.

LO 4.2 will be measured by the case discussion and commentary write-ups on cross-cultural management of an assigned teaching case.

The following rubrics will be used to evaluate the students by the final exams and case commentary write-ups for the intended learning objectives of AOL.

	Needs Improvement	Satisfactory	Exemplary
LO 1.1 Equipped with the Advanced knowledge of a specialization or profession 具備專業領域進階知識	<i>Little evidence of acquiring advanced concepts, skills and techniques in area of specialization or profession.</i>	<i>By and large acquire and integrate the advanced concepts, skills and techniques in area of specialization or profession.</i>	<i>Comprehensively Acquire and integrate the advanced concepts, skills and techniques in area of specialization or profession.</i>
LO 1.2 Be able to utilize professional knowledge to provide solutions to managerial problems 能夠運用專業知識針對管理問題提出解決方案	<i>Does not diagnose the key managerial problems and cannot utilize the advanced professional knowledge to provide effective solutions to managerial problems.</i>	<i>Principally diagnoses the key managerial problems and utilize the advanced professional knowledge to provide effective solutions to a few managerial problems.</i>	<i>Clearly diagnoses the key and subsidiary managerial problems and well utilize the advanced professional knowledge to provide effective solutions to insightful questions.</i>
LO 4.1 Determine the impact of globalization on the markets 理解全球化對市場的影響	<i>Little evidence in Determining the impacts of globalization on relevant markets.</i>	<i>Determine the impacts of globalization on relevant markets.</i>	<i>Clearly determine and well address the relevant impacts of globalization on relevant markets.</i>
LO 4.2 Equipped with the sensitivity of cross-cultural management 具備跨文化管理的敏感度	<i>Provide no or little consideration, analysis and evaluation of cultural impact of multinational management issues.</i>	<i>Successfully consider, analyze and evaluate cultural impact of multinational management issues.</i>	<i>Accurately consider, analyze, evaluate, and incorporate cultural impact of multinational management issues in depth.</i>

Study Questions for Cases

- ☛ 為使學生縮短掌握個案重點的時間，下列問題是建議各組思考的方向，各小組也可以自行將問題合併或重組來作答，只要邏輯清楚即可。且除了教師提供的這些問題之外，請各組試著思考其他問題來討論。

Case 1: 自家網站開賣？亞馬遜代銷？

個案連結：https://www.hbrtaiwan.com/article_content_AR0008768.html?success=Y

1. 風火輪應透過亞馬遜銷售成本較低的新款自行車嗎？

Case 2: Bitter Competition: The HSC versus NutraSweet

1. How should Vermijs expect NutraSweet to respond to the Holland Sweetener Company's entry into the European and Canadian aspartame markets? (Vermijs 要如何預計 NutraSweet 對 HSC 進入歐洲及加拿大代糖市場可能產生的反應？)
2. Specifically, how should Vermijs assess the relative likelihood of the two scenarios—price war and normal competition—he has in mind? (Vermijs 要如何評估在他心中的兩種情境發生的相對可能性，也就是發生價格戰或是正常競爭這兩種狀況。)

Case 3: The Video-Streaming Wars in 2019: Can Disney Catch Netflix?

1. Have Iger and his team of executives found the right formula to unseat Netflix as the leader in video streaming?
2. Should Hastings and his team at Netflix respond in some way to the looming threat posed by Disney, and if so, how?
3. In general, what factors drive the success of video-streaming services?
4. When you regard the evolution of the video-streaming space, do you feel that traditional media companies dropped the ball by allowing Netflix to become so dominant? Is there still time for them to catch Netflix?
5. How do you see the future of this space? Is there room in the market for multiple large video-streaming services? What will it take to win?

Case 4: 小米：設計「互聯網」生態系統

1. How would you assess Xiaomi's capabilities using Clayton Christensen's resources, processes and priorities model?
2. What are Xiaomi's main challenges? Is the Ecosystem model the best way to address these?
3. How does Xiaomi's Ecosystem model compare to traditional models of corporate venture capital? Does Xiaomi's model make sense? Why or why not?
4. Should Xiaomi enter the retail store space? Why or why not? Should it pursue a flagship store model or pursue a program requiring hundreds of stores?

Case 5: Jollibee Foods Corporation

1. How was Jollibee able to build its dominant position in fast food in the Philippines? What sources of competitive advantage was it able to develop against McDonald's in its home market?
2. How would you evaluate Tony Kitchner's effectiveness as the first head of Jollibee's

international division? Does his broad strategic thrust make sense? How effectively did he develop the organization to implement his priorities?

3. As Noli Tingzon, how would you deal with the three options described at the end of the case? How would you implement your decision?

Case 6: Governance and Sustainability at Nike (A)

1. Should Nike revisit its commitment to Road to Zero? Would you lower the water targets or find the resources elsewhere? What would you recommend if you were in Jones' position? In Sprunk's position?
2. What's your understanding of Nike's distinction between "competitive" and "pre-competitive"? As a member of the sustainable investment management committee, would you have recommended a wholesale acquisition of DyeCoo? Why or why not?
3. What is your view of Nike's argument that "playing offense" on sustainability can drive innovation, growth, and profitability? What is the evidence for your view?
4. How would you evaluate the steps senior leadership has taken to integrate corporate responsibility and sustainability into the business?
5. What responsibility, if any, is there on the part of business to address issues of sustainability?

個案教學法 (the case method)

(文章摘自「哈佛企管研究所秘辛」，彼得·柯思著，許士軍序)

所謂個案，事實上就是一個事件的檔卷，其中包含有大量的資料，既無一定的排列次序，也未必和待解決的問題都有關係。所以參加個案討論的學生，必須自己去發掘問題，選擇具有相關的重要資料，發展可行之行動方案，並從中選擇以求解決該項問題。在於資料不足或事實不明之處，討論者還得要提出假設，以為解決問題的根據。

個案教學法的基本前提認為，智慧是不能傳授的，所以解決問題的答案不能由教師傳授給學生，而必須要由學生自己去摸索；再者，根據個案理論，解決任何問題的正確答案，決不會只有一個，所以即使教師提出了一個，也不表示，此外就沒有其他更為妥善的答案。

由於哈佛企研所乃是首創和鼓吹個案教學法最力者，它不僅在 MBA 課程中廣泛使用這種方法，而且致力於個案之編纂、蒐集和推廣工作。據稱，目前哈佛企研所所蒐集的個案，多達四萬個以上。而每一位企管碩士研究生，在他攻讀的兩年內，一般都得要熟悉一千個個案左右；平均每天總要討論三個個案。這些個案，在篇幅上，短則七、八頁，長達五、六十頁。平均來說，一個晚上時間內，同學所要事先閱讀準備的，可能只有六十頁，但也可能是一百頁，甚至超過一百頁。在這種沉重的負擔下，哈佛企研所的同學不免要讀得半死，只為了找出問題的癥結；當然，還得想出解決辦法。

一般來說，哈佛企研所的個案教學法，至少具備有以下三方面的特點，使其與傳統的演講及討論方法不同：

第一、重視實際經驗：由於哈佛企研所的基本使命，在培育企業界的負責幹部，因此所採教材，主要都來自企業或政府的真實問題。而擔任教師者，也幾乎都是可以立即挑起實際重任擔子的人。在這種條件下，個案教學所反映的，乃是「什麼是真實可能發生的」，而非「什麼是依理應當發生的。」

第二、重視應用而非原則：我們自書本中一般所學到的，都是屬於原則方面。如何應用這些原則，乃是一項普遍而嚴重的困難問題。個案教學法的基本假定，便是：企業人員的基本任務，乃是在具體情況下如何達致決策，而非建立一般性原則或理論。這種決策技巧，只能由實務中培養。但是個案可以提供種種特定情況，讓同學去發掘情況中的特殊之處，設法解決個案中的問題。

第三、重視培養同學思考方式以及運用資料的能力：個案教學所強調的，並非僅僅是知識的傳授；這一部分往往包括在學生的課堂外指定讀物之中。個案教學所企圖達到的，乃是更進一步，從學習者的認知層進入情緒層。這樣的學習，才能代表一個人真正的學習和成長。

個案學習的四個階段

在本書中，讀者就可以從所記載的日記中，發現類似如下的描述：

「愁容滿面的一年級生，摸索進入一年級的大門，有的膽怯，有的倉促。……」

「當我對他人的能力和弱點愈加瞭解的時候，我對自己也就比較客觀了。……」

「哈佛企研所教育的精華所在...學生不僅有機會去犯錯，還有機會去發現、去瞭解。等到瞭解之後，學生就可以自我超越。看似浪費時間與精力，卻轉而成為戲劇性的、令人振奮的經驗。走出教室時，你不是愚昧的人，你是傑出的思想家。……」

「我認為這兩年給我信心，我堅決認為，普普通通的常識可以改變世界。走出校門之際，你覺得天下無難事了。」

像這幾條所摘引的，實際上乃代表學生從學習個案中所經歷的幾個階段；而且這種階段的演變，乃是屬於情緒和心理方面的。國內有許多人不明白這點，以為每一個個案都代表一個教訓，一個可以仿效的最佳解答；學了一個個案，便等待教師發下一個個案，以便遇到同樣情況時便可依樣葫蘆地用上。

關於這種個案教學法下所引起學生情緒上的轉變，也有人——也是哈佛企研所的圈內人——以自己的經驗，予以歸納為四個階段：

第一個是「沮喪」的階段。在一開始，學生在教室中面對一套和他過去經驗完全不同的情況。他所最先拿到的，不是一本教科書，而是一堆既不完全又不確定的事實資料，譬如有關某某機械公司推出一種自動刮鬍刀上市，或有關一位領班和一位工人的談話紀錄。

他發現個案中出現有許多專有名詞和公式，都沒有經過事先詳細的說明。教授們在教室中的表現，也使他感覺雜亂而缺乏頭緒。他們既沒有口授什麼原理原則，也沒有給予大家一個「正確的」答案，可以讓學生記在筆記裡面。相反的，教授只會問同學有關他的看法和做法，以及什麼是當前公司所面臨最重要的問題。

同樣地，他發現，每天所遭遇的問題都不一定能用昨天所獲得的答案，予以解答。每次當他自以為找到普遍適用的一般原則時，他又會面臨另一套環境與變數，使昨天的辦法應用不上。在這種情況下，他感到徬徨無助，迷惑不已了。

第二個是「好奇」的階段。逐漸地，他的好奇心不但被刺激起來，而且還會引導他努力去尋求自己的答案。他會想要知道，別人怎樣解決這一問題，以及他們所使用的方法。他不但逐漸瞭解了種種與企業有關的專有名詞與技巧，而且能在一種現實的背景中，消化了種種資料、方法與技巧。這樣，他不致等到考試一過，便又一股腦兒還給了教師。

第三個便是「悟解」的階段。由於個案教學法引起學生個人和團體雙方面的活動，使得學生能從他人的意見和討論中，對自己有更深一層的瞭解。譬如說，當他發表自己的見解、感覺、反應或態度時，他發現，有的獲得同僚的支持，有的卻遭反對。這樣使他有機會對於自己的個性與人格，進行重新評估。

同時，他也在觀念上逐漸瞭解，對於種種企業問題，是可以有許多方法並行而不悖。尤其等到他進入第二年時，他有進一步的機會，學習一些較為專門的問題，例如管理會計，廣告方面的特殊方法與技巧。這時，他不但開始瞭解到，現實情況不是不能管理的，而是知道，各種不同管理方法之間的差別。

第四個——也是最後的——階段，乃是「融會貫通」的階段。隨著時間進展，討論過了更多個案以後，這位學生逐漸對於自己在解決一繁雜情況的能力，產生出信心。他開始感覺到，在處理這種情況自己掌握有什麼力量和工具。他深信，只要自己能針對當時特殊情況，採取技巧的思考和行動——而非靠一些強記的原則——他將能在未來所從事的管理事業中，成功地處理各種棘手的問題。