Center for Excellence in Teaching FIT

REFLECTIVE PORTFOLIO

Min Ki (Mitchell) Kim
Adjunct Faculty
Production Management Department
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My Teaching Philosophy: My students are my customers!

I am a rookie educator. I embarked on my second career as an educator in August 2019, teaching MG153 – Excel for Business Course in the Production Management Department, after spending the last 20 years working as an equity research analyst for Wall Street firms like Morgan Stanley and as a hedge fund manager. Because my expertise is in finance, investment, and corporate strategic planning, my approach to education may be different from the many talented, artistic, and creative faculty members of FIT. However, I am certain we all share the same goal – i.e., how do we help students to explore their passion and prepare them to become leaders in the path of their choice. For this reason, I am always ready to learn from other faculty members and always willing to share anything that can be of value to them.

My teaching philosophy is centered on my 30+ years of work experience but adapted to an academic setting. Over the years, I have provided on-the-job training to numerous junior colleagues on accounting, finance, valuation, and strategy. I have made many investment presentations to my clients at private meetings on which stocks to buy and sell and how the technology is changing our world at large conferences. I have conducted numerous live TV interviews with major business media – CNBC, Bloomberg TV – to educate the public on how to make money. While these experiences may not readily be compared to the traditional academic teaching experience, *I believe the philosophy is the same: help my students/customers learn in an effective way.* As an adjunct instructor at FIT over the last 12 months, I weaved and adapted these skills to the classroom at Building C. It was extremely rewarding to see the positive outcome of my approach, but I also know we need to raise the bar higher every year.

My teaching philosophy begins and ends with the belief that my students are my customers. I think of teaching as a franchise: my classes are my business and students are my customers. I am delivering an education service they purchase. I am creating my own brand, but

the success of my franchise depends on how much value my students derive from my classes. I have five principles I follow:

1. **Make it simple.** Mark Twain said, "I didn't have time to write a short letter, so I wrote a long one instead." While Mr. Twain's quotation is about writing, this applies in general to communication. Throughout my career as an analyst, I have been trained to make sure I can explain the most complex investment ideas in a simple way to understand. "Put it in layman's terms" is what I learned and what I would tell those who I trained. This is because when you are delivering a persuasive recommendation to clients who cover the global markets and only have a general understanding, your arguments must be compelling and simple to understand. Otherwise, no matter how you much know, you lose the deal if you could lose the client. Effective communication requires not only knowledge but also a well laid out plan and a great deal of practice. As an analyst, I scripted and rehearsed for hours to deliver a 2-minute sales pitch. I owe it to my students to practice to "seal the deal" in every class.

2. **Know your audience.** Teaching is not about me; rather, it is about the student. It is not about displaying my knowledge; rather, it is about expanding the students'. Learning does not happen by osmosis because I cover thousands of pages of material in a single bound, but it is about helping students gain the essential knowledge to achieve their goals in class or in their careers eventually. To do that, I need to continuously assess whether they understand what I am teaching. Read their facial expressions. If they zone out, I am not doing a good job. I must always be ready to adjust to ensure maximum engagement. This is the same in a business setting. When I am meeting with clients, I need to change to ensure my message gets through.

3. **Motivation is critical.** I believe the best learning occurs when students are motivated. Most students will be motivated if they know a successful completion of the course will lead to rewards whether it is personal growth, academic growth, or increasing the student's marketability for a job. I know if I need to know the company in-depth for a meeting with a key client, I could spend just a few days to become an expert. It may be difficult to convince students of the concrete value of some classes, but I believe communicating and reminding the students how your course fits in the world of fashion is critical. Bringing in real examples really helped in my case. I taught two sections of MG153 – Excel for Business Course in 2019 – not exactly on top of the must-learn list of fashion students. In fact, most of the students were first-year college students with only a vague understanding of how Excel is used in business. But once the students were convinced that Excel was essential in the fashion business and that their resumes will stand out if they have proficient knowledge of Excel and a Microsoft Office Specialist (MOS) Certificate at the end of the semester, their determination to learn for most of them was absolutely inspirational. It was most rewarding for me to learn that my two sections had the two of three highest passing scores for the MOS certification exam in Fall 2019

4. **Keep students engaged.** In the e-commerce industry, keeping customers engaged in the ecosystem leads to greater sales. I believe this is applicable to teaching as well. Keeping students engaged through participation and periodic feedback is critical. I have introduced a point system with three levels: 1) basic engagement (80 points) – keeping good eye contact with me; 2) good engagement (90 points) – asked a question or provided an answer; 3) excellent engagement (100 points) – asked more than one question or provided more than one answer to my verbal questions; 4) ultra-engagement (120 points) – demonstrated knowledge by conducting an in-class Excel exercise. With

students knowing that the participation grade making up 9% of the semester grade, this system provided significant incentives. (I made sure to give students a fair opportunity to earn points by giving a first right of refusal to students who previous did not have the opportunity.) Thinking back to my student days, I recall I was always more motivated to prepare knowing that my professor could call on me anytime. For my future classes, I plan to incorporate as much engagement as possible.

5. **State the conclusions first.** In the finance industry, I have been trained to state the conclusion first, and then highlight the reasons to back up the conclusion. I believe this is in reverse of the typical academic approach where the problem is introduced, then the methodology and finally the conclusion. While this structure may be effective for an academic white paper and for certain courses, I believe students are better engaged when they know what the end goal of the course and what each lesson's takeaways are. While this may not be possible in all courses, I believe this works for business classes such as Excel for Business or the Case Analysis courses. I have a strong belief that knowing your audience and keeping them engaged is critical.

Learning from the Best: Watching a Master Teacher at Work

My master teacher was Harry Davis at the University of Chicago Graduate School of Business from nearly 30 years ago. He was a mentor to 25 students including myself who were selected to become a facilitator for the business school's LEAD program, which was a credited course. Facilitators were to run the following year's LEAD program, designed to teach incoming first-year MBAs about ethics, teamwork, integrity, and leadership. Because my class was the first group of students to complete the LEAD program at the business school (and the second generation of facilitators) the program was constantly evolving. Facilitators were given the independence to reshape the program in the way they saw fit.

Professor Harry Davis was the instructor and administrator for the LEAD program. What I took away from his style of teaching was his quiet unassuming leadership, guiding us to achieve the stated goal but giving us the latitude to make decisions and chart the path. The program was not a typical course consisting of lectures or exams, but one involving research, benchmarking, and developing the final product, the LEAD program.

His notable approach to teaching was: 1) communicated a clear goal of designing a program for elevating leadership; 2) provided sufficient materials and injected thoughtful leadership cases for us to benchmark against, 3) encouraged us to set milestones to assess our progress, 4) provided constant feedback, and 5) gave us clear criteria for grading our final project.

The Joy of a Successful Lesson

When my MG153 student shared with me at the end of one of the classes in fall 2019, "This is my favorite class!" I instantly knew why teaching is such a rewarding profession. The moment was even sweeter because the comment came from a student who told me earlier in the semester that she was intimidated by Excel and the spreadsheet model building was not her "thing." The comment came after a class covering a particularly challenging chapter in Excel in using the Vlookup table. I believe the student overcame her trepidation over Excel mostly because of her hard work but I believe it was also because she was in control of her learning. I believe conducting every lesson with my three-prong approach gave her the confidence that she can learn to be proficient in Excel (she received an A and passed the MOS exam.) My approach was: a *review of the previous chapter, emphasizing the takeaways from the current chapter and a short preview of the following week's chapter.*

Review: the importance of reviewing the previous week's lesson. In that class, I spent the first 15 minutes reviewing the top three incorrectly completed exercises from the previous week's homework (I always give the students statistics on which exercises students missed the most). Afterward, I gave the students an option to resubmit the homework for better grade students (I am a firm believer that the key to learning Excel is to conduct more exercises and doing it the right way.) Giving students earliest possible feedback leads to enhanced learning, in my view.

Provide the context. Once the review of last week's homework was complete, I covered the new chapter by stating the takeaways from the new chapter by sharing a case study. For example, "Mary, if you were an associate and your regional manager asked you to provide her a report on the average price of dresses sold in the South region, how would you go about doing that?" Then I highlighted the steps one would need to do to complete this task. By giving the student a believable scenario they could potentially find themselves in the future is beneficial, in my view.

Keeping the class engaged. I typically cover four exercises each session. To keep the students engaged, I would select a student to conduct each exercise on the instructor's workstation. As I guide the student through the exercise for all to follow, their work is projected on the screen (students are more than willing to volunteer since they receive extra points for participation.) I found students more engaged when their peer leads the exercise than when I do.

Recap and then Preview the next chapter. Upon completion of that week's lesson, I recapped what we learned in that week and how it was related to the previous week's lesson and what we were going to cover the following week.

At the end of the class, I felt a great sense of accomplishment because I gained greater confidence that I was beginning to make a difference in my students' ability to grasp Excel. I felt reassured that reinforcing and relating continuous lessons were critical to student's learning. **Their improving performance on the assigned homework each week as well as their willingness to resubmit revised exercises were evidence that my efforts were paying off**. (My two sections had the top three passing rates as well as top three average passing scores for the MOS certificate exam at the end of the fall 2019 semester.)

Learning from an unsuccessful lesson

Technology needs to be carefully harnessed for effectiveness. I learned an important lesson to avoid introducing a new medium in class without properly communicating with the class why we are using it and what we want to take away from it. In addition, you need to control the pace of the video such as LinkedIn Learning since not everyone could follow it at the same pace.

In one of my classes, I used LinkedIn Learning to cover the areas outside of our textbook in preparation for the MOS certification exam at the end of the semester. Even though I communicated to the class on the purpose of the video, a few students surprisingly had a negative comment on LinkedIn Learning. Some found the video to be too fast even though I intermittently paused to emphasize different points and allowed some students to catch up. Some found it too slow. Even though most of the class found LinkedIn Learning to be helpful as indicated in the mid-term survey I conducted later in the course, a couple of students expressed discontent because they had to watch a video instead a lecture from me. I felt a bit disheartened but I welcomed such feedback.

At my next opportunity to use LinkedIn Learning again after a few weeks later, I made it clear to students the areas that LinkedIn Learning supplemented the textbook and summarized the concepts covered and how they are used. I paused the video every two minutes to check on the class and fielded questions. After the video, I demonstrated using my own examples to make sure they fully understood the concept covered in LinkedIn Learning and emphasized the exercises that were most likely to be covered in the MOS test. While I don't know if I was able to fully address the concerns of those students who expressed their dissatisfaction in the midterm survey, I felt I made progress looking at the end of the semester survey and the MOS exam passing ratio of my classes.

Why am I introducing and/or expanding the use of technology into my teaching?

My MG153 classes are already a lab-based learning course, which lends itself to the use of technology. However, adapting to distance learning due to COVID-19 brings on a whole new set of challenges. To supplement the loss of in-person interaction, I am looking to add more ways to increase engagement. In addition, we will be using Pearson's online-based learning format, MyITLab, which needs to be integrated with Blackboard. To be successful in this format, I plan on investing time prior to the start of the semester and devote the first class to ensure all students are a level field of understanding how to navigate in BB Collaborate, how to conduct and submit the assignments online and to track his/her course progress. I am planning to seek a way to insert LinkedIn Learning videos in a BB Collaborate environment to preserve interactivity in the virtual environment.

In addition, I plan to introduce VoiceThread to my Global Warehousing course, which I am co-developing with Professor Regina Yoo, to add a group collaboration element to the course. I was pleasantly surprised how easy it was to learn to use VoiceThread to share videos, pictures, and text. I believe this will be a great tool allowing for group collaboration projects. This is particularly essential in a virtual classroom environment.

Technology Innovations will Enhance the Learning Experience

I believe we educators need to embrace technology to enhance the learning environment. While my courses are more analytical and involve more practical case studies, they also require students to work with various medium and tools to analyze and present their ideas. Tools for business analysis are mainly Microsoft Excel and Access but presenting ideas and conclusions requires the use of multiple media including text, pictures, and video through Powerpoint, Word, and Adobe PDF for a traditional document. For interactive communication, we need to embrace new tools such as Padlet and VoiceThread to invite collaboration and greater engagement. In the future, teaching tools will involve AR (Augmented Reality) and VR (Virtual Reality) as well. **Adapting these technologies in the way we teach will not only elevate our effectiveness but also promote familiarity for our students, which increase their competitiveness compared to their peers when competing for jobs once they embark on their career path, in my view.**

What are new teaching ideas I am planning to implement as a result of this technology certificate program?

This program has opened my eyes to think about ways to incorporate the new technologies in every course I teach or design. As I stated before, most of my courses are (and most likely will be) business courses. However, the methods and technologies introduced in the program encouraged me to think outside the box. If we could find a different way to engage and motivate students, we need to invest our time and energy to adapt these tools in our courses. Innovation is changing the way we do things and raising productivity. Education must also adapt. Because most of my experience is from the business side, I hope to contribute to FIT with "out of the box" ideas to make a greater impact on our students. I will look to incorporate VoiceThread into my Global Warehousing and Business Case Analysis courses for group projects.

How will these new technology tools/approaches contribute to your classroom practice?

My goal as an educator is to make a positive impact on my students. I aim to make a difference in our students' lives not just by sharing my knowledge but also to advise on the career. I already have an open invitation to my past students to reach out whenever and I will help as much as I can. My students truly appreciated that their instructor cared beyond the classroom. I hope some of my students could look back ten years later and think of me as someone who made an impact on their lives. For the Excel for Business Course, I will continue to implement the best practices in my classes. I am certain my teaching philosophy will continue to evolve as I discover more effective and impactful methods from my own experience as well as learning from other more experienced professors.

For other courses that are less lab-oriented, I plan to add more mini-projects and presentations requiring the use of VoiceThread and Padlet. I want to emphasize to students the

importance of effectively communicating your ideas and knowledge in both one-on-one as well as in a team setting.

How will you evaluate the success of your activities?

I will use three ways to evaluate my success: 1) I will review the recordings of some of my classes from earlier in the semester and compare it with the later ones. I will also compare my progress from the prior semester to assess where the improvements are and the areas requiring further improvement. **2**) I will conduct an anonymous mid-semester survey for all my courses to gain feedback from students to measure my effectiveness and seek ways to improve the course for the second half of the semester. **3**) I will also review the end of the semester evaluation to identify the improvement areas.

The bigger picture related to technology and learning

Technology is a powerful tool, but it is also there for us to harness, not to be encumbered. We as educators need to fully understand how to use technology as a tool to deliver the most effective learning environment, and not assume that just by throwing technology in the classrooms will automatically provide the solution. We must know which technology and which circumstances that are best suited for the learning environment. At the same time, I believe we need to make sure students are not consumed by the technology itself and lose focus on the ultimate purpose. If the difficulty of learning a new software prohibits a student from exploring and expanding their creativity, technology does not help. We must assess the cost-benefit of introducing a new technology.

Educators will have to embrace technology. COVID-19 has proven that we need to structure our lessons to be platform agnostic -- whether it is in-person, online or virtual. To do this, we need to have a good understanding of the various tools available. Socratic method, so powerful in an in-person lecture hall, may not be effective on a Zoom call with 25 students if not thoughtfully orchestrated. Student collaboration and interaction with the instructor bring on different challenges in a virtual setting, and especially if contingency plans for various scenarios are not well planned.

Students will need better training prior to the start of the course. As technologies get more sophisticated, schools need to make sure that students are properly trained prior to the class to avoid disruptions to their learning. The last thing an instructor wants to do is to tutor a student on why she is unable to upload a video or a picture in VoiceThread or in the Blackboard. Moreover, one person's problem suspends the valuable lesson time for all. It is difficult for an instructor to diagnose problems with hardware or software in a lab or even more so in a virtual environment. Therefore, instructors will need strong support before, during, and after the class.