Case Writing Guidelines Book and Quick Reference Guide

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Case Writing Guidelines Book

Prepared by Tao Yue

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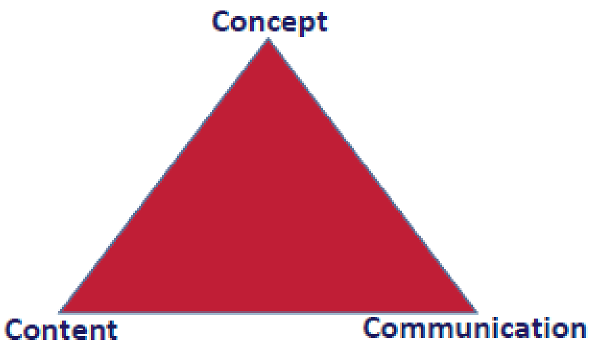
1.0 Introduction

The hallmark of a good case writer is to explain a highly technical subject in a non-technical way.

When asked what a case study reminds them of, most people who are slightly familiar with cases would say words like “dilemma”, “story”, “drama”, “decision”. A case study is a unique learning tool through which students vicariously experience stressful management situations or dilemmas that they must then analyze and solve. A well-written case study resembles a detective story or a piece of investigative journalism that grabs the reader and compels him or her to keep reading, and to dig into a situation to discover what is really happening. In this way, case studies can almost be considered a literary art form.

But case studies are not just art. They are also science, in that they are always based on real-life situations, logically and systematically structured, and serve a defined pedagogical purpose. A case writer must know what he or she wants students to get out of a case, and reverse engineer the data available into a proper case study. To write a case study is not just to tell a story about an organization, but to explore what lies beneath a business decision. It is this focused exploration and discovery that brings case writing closer to a science.

In this book, we will look at both the artistic and scientific aspects of case writing. The book includes three main parts: *Concept*, *Content*, and *Communication*. “Concept” pertains to the purpose of a case study; “Content” describes where to find information for building the case and how to structure the information; “Communication” explains how to write the case so that it engages students. The three C’s are the pillars of case writing; if one is missing, the case will collapse.



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When we talk about a “case” or a “case study” in this book, we mean a "teaching case", as opposed to a "research case" used by scholars or a "business case" used by companies. The differences between these three types of cases are explained in section 1.1 below.

1.1 Teaching case, business case, and research case

Teaching cases, research cases, and business cases are all called case studies, but they are targeted at completely different audiences and serve completely different purposes. Teaching cases are for students to learn within situations based on real life. Research cases are for academics to study organizations, situations or other objects up-close and in-depth. Business cases are for practitioners to convince a decision maker to approve of a project, an investment, or a deal.

Business cases vs. Teaching cases

Many business school teachers have worked in companies or have taken part in consulting projects. They are familiar with business cases, and naturally think that teaching cases are similar to business cases, with the audience the only difference. This is a mistake. A business case is about persuasion. It usually starts with a business problem or opportunity, and then offers a solution supported by a cost-benefit analysis and risk assessment. It will also generally outline the operational and financial plans necessary to carry out the solution.

Although also problem-oriented, a teaching case never offers a solution nor is it meant to persuade or convince anyone. It often concludes with an open-ended question, so that there is no defined or "best" solution. The goal is to improve students’ analytical, communication, problem-solving, and critical thinking skills. Because students often work in teams, a teaching case also helps improve their teamwork skills. Thus, we can say a teaching case is practice-driven, whereas a business case is solution-driven.

In addition, a business case is usually shorter than a teaching case. The former can be a few pages or only a deck of PowerPoint slides; the latter most likely is a coherent narrative of 10 or more pages. The language of a teaching case also resembles that of storytelling – direct, lively, vivid, and to the extent possible, devoid of jargon. A business case, on the other hand, typically uses business language including phrases, words, and acronyms that only people working in a specific industry or organization understand.

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Research cases vs. Teaching cases

Research cases can also be easily confused with teaching cases because both are used in education and are sometimes even produced by the same people. Although a research case and a teaching case can be derived from the same original data and used in the same environment, how these cases are written is very different.

A research case is part of a research paper, often labeled as a section called "Case Study". The purpose of the case study section in a research paper is to provide empirical data to derive a hypothesis or prove a hypothesis. On its own, this section does not have much value. Often, a research paper contains several case studies because just one study is insufficient for generalization, and multiple samples are needed. A research case must be factual. It needs to describe an organization and a situation as faithfully and comprehensively as possible. Express emphasis or omission of data, personal or dramatic elements, and any subjective perspectives are generally not acceptable as they may compromise authenticity.

A teaching case, on the other hand, needs to relate a story more than simply driving to conclusions from research. Teaching cases present facts with a personal touch. Although a teaching case is also about a real organization and real events, its purpose is to recreate a lifelike situation. Consider a teaching case as "Reality TV" in the world of business research. In real life, our information is never entirely comprehensive and unbiased. A situation is often explained from one person's perspective, to the detriment of someone else's. We then have to make the best decision possible within these limitations. A teaching case should reflect this reality. In order to facilitate learning, a teaching case does not provide any analysis or lessons learned; it leaves that up entirely to the reader, as well as to the teacher who steers the class discussion. Lessons to be conveyed are written up in the teaching note. But even without the teaching note, a teaching case must always strive to be informative, entertaining and thought provoking.

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The table below summarizes the key differences between a research and a teaching case:

Research case	Teaching case
Description	Story
Analysis	Not in the case, but in the teaching note
Faithfulness and comprehensiveness	Highlighting and omission
Chronology	Not always chronological
No perspective(s)	With perspective(s)
Little or no drama	Drama and controversy preferred
Little or no value without analysis	Some value

To write an effective teaching case, a researcher has to switch his mindset from that of a scholar to that of a creative writer. Hence, the hallmark of a good case writer is to explain a highly technical subject in a non-technical way. Remember, when you write a teaching case, you are writing for students and the general public – not for your peers and reviewers. They should understand and enjoy what you say without asking questions. This switch of mindset needs practice. The best way to practice is to write a few teaching cases, test them in class, rewrite them, and teach them again.

Once you have the data, should you first write a teaching case or a research case? There are different schools of thought, but most instructors find it easier to write a research case first. A teaching case must serve some defined learning objectives which are to be found through the analysis of the research. In other words, an instructor should first master the facts and key findings from his research topic before writing a teaching case for his students.

To turn a research case into a teaching case is not a quick conversion job. The instructor needs to go back to the case organization to collect additional information on personal stories and perspectives, and put on the cap of a creative writer to recreate the case study. There is no easy way to get around it.

1.2 Why should you write your own cases?

As an instructor, if you want to use the case method in class, you do not have to discuss cases which you have developed and written yourself. There are many other ways: you can use an existing case that more or less matches your teaching objectives; you can use newspaper articles or video clips that describes the organization and the issue you wish to discuss; you can invite a practitioner from

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the organization to give a guest speech about the issue to your students; or you can assign students to do field research on the organization and discuss their findings in the class.

These teaching methods would consume much less time and effort than writing a new case from scratch. None of them, however, would give you as much control over your teaching as using your own case. Only with your own case can you reach all of the teaching objectives that you have in mind. Because you are familiar with the case material – you have dissected and synthesized all the information yourself – you can play with it to enhance discussion quality and class dynamics.

In addition, there are several other advantages to writing your own cases:

The first is that you can maximize the use of your research data. Academics, especially those who do qualitative research, often have hours of interview recordings, piles of notes, and folders of secondary data. After one or two research articles are written, most of these materials would sleep on shelves and in drawers. But there are plenty of data, both primary and secondary, that can be turned into nice teaching cases if you dig them up and reshape them.

Secondly, writing itself is a process of clarifying your thoughts. You check your theory against reality, take the role of a practitioner (an executive or manager in your case organization), and examine the theory. This forces you to look at academic questions from outside in, and to bridge the gap between theoretical explanation and real life practice. Moreover, because your audience is young students (undergraduate and graduate) or post-experienced students (MBA and executive), you must rephrase what you know in everyday language free from academic jargon. This further forces you to clear your thoughts and to express them well (jargon often clutters the mind).

Finally, once you have a case study based on solid research, you can easily turn it into an article for managerial journals, newspapers, or your own professional blog. The style of a case study fits well with publications intended for general readership. But these popular articles can enhance your reputation as an expert in your field as well. Many bestselling authors of cases and management articles will tell you that their research papers are more often cited once these have been turned into case studies

To summarize, writing your own case study has **4 advantages:**

1. Thoroughly reaching your teaching objectives
2. Maximizing the use of your research data
3. Clarifying and articulating your ideas

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4. Reaching a wider audience of general readership

1.3 Why should you consider writing a decision case?

There are many different types of teaching cases, for example: the background case, the incident case, the exercise case, the situation case, the complex case, and the decision case (see *Case Teaching Guidelines Book and Quick Reference*). Each type of case serves a distinctive pedagogic purpose and aims at a different group of students.

The background case is short and simple, often an excerpt from a newspaper. It illustrates a single situation, providing the information needed to get familiar with certain facts and ideas. It is the least challenging for students to analyze compared to the other types of cases. It is suitable for undergraduate students who are just starting to learn with cases or for instructors who are teaching cases for the first time.

The incident case, like the background case, is relatively simple. But it requires students to know not just the facts and ideas of the case, but to truly understand them. It is also suitable for students and teachers new to the case method.

The exercise case moves up a level on the hierarchy of cognition. It is used to train students to apply a conceptual framework or a calculation model that they have just learned.

The situation case is even more complicated than the above three types. It requires students not only to understand concepts and do some exercises, but to analyze what is really going on and find the root cause to a problem.

The complex case is basically an advanced version of the situation case. It involves more than one situation and its contributing factors. Among much information, students must find the root cause to a problem and evaluate whether what the case organization actually does is effective or not.

The decision case includes all of the above elements, but goes further. It requires students to solve a problem in a situation where there is no obvious solution. The problem is often presented as a dilemma, so students have to ask themselves what the lesser evil is and how to deal

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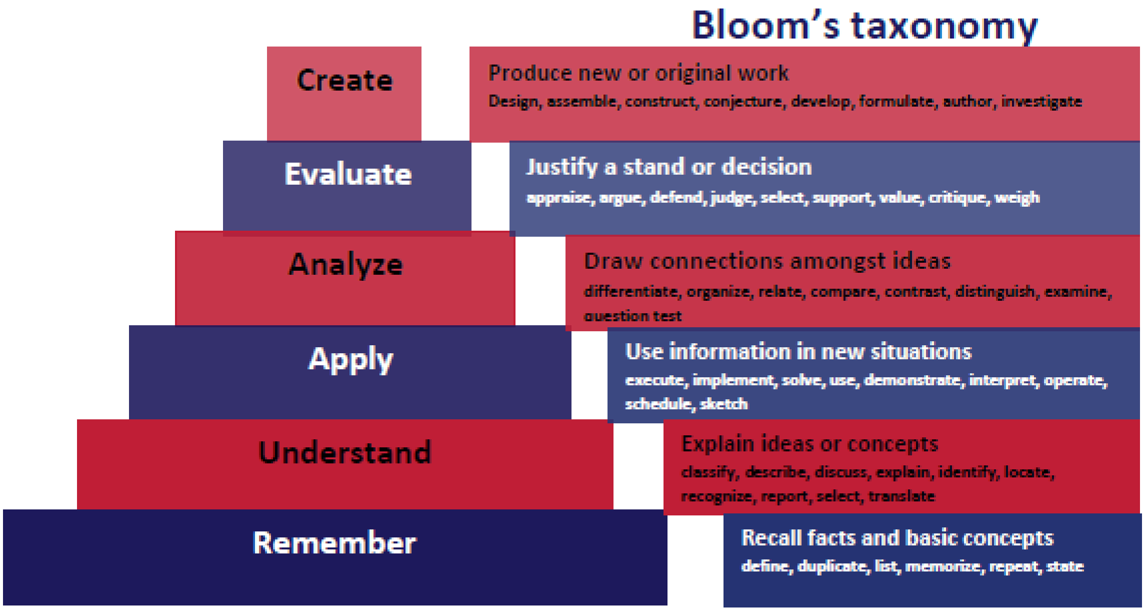
These six types of cases correspond precisely to the pyramid of learning as seen on Bloom's Taxonomy (Exhibit 1). The background case lies at the bottom of the pyramid in the purple zone and corresponds to remembering basic concepts. The incident case moves up a level into the blue zone of conceptual understanding. The exercise case belongs in the dark green zone of applying the concepts learned. The situation case lies in the light green zone and asks the student to use his analytical skills. The complex case in the yellow zone requires an evaluation of a set of data and circumstances. The decision case in the red zone reflects the highest level of learning: applying concepts learned not only to evaluate a situation, but to create and develop a solution.



The decision case embodies all the other types of cases. If students can solve a decision case, they will also be able to tackle and solve any other type of case. The same goes for a case writer: if you can write a decision case, you will be able to write all types of cases. Once you have a decision case, you can also easily turn it into another type of case if you think that a

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simpler case would work better in your class. For these reasons, a new case writer should learn the craft of case writing with a decision case.

Furthermore, the decision case most resembles real life. As said in the preface, many problems in reality have no easy or best solution. Problems are often intertwined: solving one would cause another. The critical ability of a decision maker is to judge a complex situation, find the root cause, and come up with the best possible and practical solution. Decision cases therefore can prepare future leaders in business, politics, and many other areas to take up challenges with responsibility. The focus of this book is to teach you how to write a decision case.

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2.0 Part 1: Concept

Case writing is an art of reverse engineering.

To have a concept is the start of case development. A case concept has two interdependent aspects: the purpose of the case and the focal issue of the case.

Before you set out to write a case, you should ask yourself why you need to write it. Case writing is purposeful storytelling. You have a purpose, or teaching goal, and you can use a case to reach this goal. In this context, the purpose of the case is a set of teaching objectives, or key learning objectives (KLO's), if we take a student's point of view.

Once you have a purpose, you need a medium to reach it. The medium is the case itself. Many instructors choose a case organization because they know someone working in the organization (easy access to data) or because they have heard or read something interesting about the organization. But this is not enough. An interesting organization with abundant data does not guarantee a good case. You need to find a focal issue on which you can anchor the case discussion. Only with a distinctive and important issue will the case come alive and serve its purpose.

Once you have both the purpose and the issue, you have the concept for your case. But is the concept worth developing into a full-blown case? Not necessarily. There might be existing cases that have already dealt with the issue and served the same purpose. If so, there is no need to reinvent the wheel; you can just purchase the case and use it. Run a search in one of the major case databases, such as The Case Centre, Ivey Publishing, and Harvard Business Publishing, you will find whether a similar case already exists.

2.1 Preparing for writing a case

You need a target audience, a set of teaching objectives, and a list of discussion questions in mind before you can write a teaching case. As said earlier, teaching objectives are the purpose of a case. Ideally, a case should serve 3-5 objectives: if fewer than three, the case will be too simple; if more than five, it will be hard for students to manage. For a case to achieve the best learning outcome, it needs sufficient richness and depth without being too cluttered with information.

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To determine the right teaching objectives, you first need to identify your target audience. Knowing your audience can help you formulate a set of teaching objectives that matches your students' level of study. For undergraduate students, for example, the teaching objectives can be less ambitious than for graduate students. You can aim to have undergraduates evaluate a situation rather than come with up a creative solution, as might be expected of graduate students.

Knowing your audience in advance can also help you design case discussion questions more effectively. For example, if your target audience is a group of executives or MBA students, it is better to ask them managerial questions rather than theoretical questions. For a regular case discussion session (1.5 to 2 hours), 6 to 10 discussion questions of varying complexity are generally sufficient. Each discussion question should be aligned with a teaching objective. After students have discussed a question, they should be closer to reaching the intended learning objective.

2.2 Closer look at a decision case

A decision-focused teaching case is a description of an actual or fictional situation based on real life. Often, it is a problem or a dilemma which a decision maker must solve. This type of case brings real world challenges into the classroom to vicariously oblige students to step into the shoes of a decision maker in an organization.

Below is an example that illustrates what a decision-focused case is, and what it is not:

Let's look at Bhutan – the small Buddhist country nestled in the Himalayas between China and India. Do you know that it "officially" values happiness? In 1972, King Jigme Singye Wangchuck of Bhutan declared that General National Happiness (GNH) was more important than Gross National Product (GNP). Bhutan coined the term "Gross National Happiness" which was later adopted by countries like the United Kingdom, France, and the Netherlands after Bhutan had proven the success of this concept.

An academic has researched Bhutan's GNH for some time and accumulated many examples of how the concept is diffused in different areas of Bhutan's social and economic life. He wants to make a teaching case to show students what he has gathered in his research, with

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the goal of broadening students' understanding to include not only GDP, but also GNH, as a measure of national growth. He also thinks this case will be inspiring for business and political leaders who want to make positive changes to the world.

First, he wants to analyze GNH and examine the 4 pillars that support it: natural environment, cultural values, good governance, and equitable and sustainable socio-economic development.

Then, he wants to focus on each of the pillars, using examples to explain how these ideas are turned into concrete policies permeating nine areas of work and life: Health, Psyhological Wellbeing, Living Standards, Time Use, Education, Culture, Governance, Community, and Ecology. So he writes up a case outline, including: (1) an introduction to Bhutan; (2) an overview of Bhutan's GHN concept; (3) the four pillars of GHN; (4) the nine areas of GHN policies with examples; and (5) broad lessons of the Bhutan model. Has this academic developed a proper teaching case?

Most people would answer no that this is not a proper teaching case because it lacks a story and a discussion question. And that would be correct. Several important aspects of a powerful teaching case are missing here, including a story and a dilemma. However, the case could still be used in class as a background case: the purpose would be for students to understand what GNH is, why GNH is as important as GDP, and what can be done to increase the level of GNH. But to make the case more challenging intellectually (i.e., to move it up the hierarchy on Bloom's taxonomy pyramid), it would have to be written differently.

Now consider this[1]: Bhutan is famed to have found a recipe for governance that strikes a balance between the pursuit of economic growth and the pursuit of happiness, but it is still very much a developing country that urgently needs to build infrastructure, and improve healthcare and education; i.e., Bhutanese citizens still face many obstacles to happiness. When the need to modernize and the need to preserve the country's natural and cultural heritage are in conflict, what should the Bhutanese government do?

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[1] The example in this and the following paragraphs of this section is based on the Harvard Business School teaching case *Bhutan: Governing for Happiness*.

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Is this a more interesting case? With a bit more analysis, and a single pertinent question, a background case becomes a decision-focused case. Students no longer read the case passively merely to understand what is going on in Bhutan, but they are now obliged to get involved and discuss the paradox of pursuing economic growth versus preserving a country's natural and cultural heritage.

Again, consider this: In March 2014, the newly elected Bhutanese Prime Minister Tobgay received a project proposal of constructing four hydropower plants through a joint venture between India and Bhutan. The economic argument was compelling: the project would increase hydroelectricity production, Bhutan's chief export. At the same time, it would create many jobs to combat the problem of rising youth unemployment. Despite these benefits, however, the project would have significant environmental and social consequences including possible displacement of local people and the extinction of an endangered bird.

The case now had a flesh-and-blood decision maker, not just an abstract government body. The dilemma also became concrete: rather than how to achieve a balance between economic growth and preserving natural and cultural heritage, the prime minister had to decide whether to approve building the economically rewarding but environmentally and socially taxing hydropower plants.

Let's add more color to the situation: Tobgay's predecessor was widely criticized for taking GNH too far, after which Tobgay and his party were elected. Tobgay had to deliver on his promise of improving the economy while at the same time upholding his commitment to GNH. He was not sure whether GNH was just a fad, or whether it presented a necessary step towards sustainable development worldwide. He wondered at what cost he should pursue GNH. But he had no time to debate the issue – the proposal had to be signed off or vetoed quickly.

The situation has now become more complex. What the protagonist must do is not only calculate the trade-offs between economic and environmental / social values in this particular project, but also decide how he can best serve his office, manage voters' expectations, and create lasting positive changes for Bhutan. The introduction of the

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protagonist's personal motivation makes the case even closer to real-life decision-making in which nearly all decisions are influenced by human elements.

2.3 The essentials to a decision case

From the example in the previous section, we can see that there are four essential building blocks to a decision-focused teaching case:

- Issue
- Protagonist(s)
- Time point
- Action trigger

The issue in the example is whether to approve the hydropower plant project. The protagonist is Bhutan's Prime Minister Tobgay. The time point is March 2014. The action trigger is that he has to sign off or veto the project quickly as he cannot afford to debate the issue for years or even months. To make a decision-focused case work, we must have *all* four items. Missing one would make the case inadequate.

Issue: The issue is the most important of the four decision case building blocks. Without a clear issue, students lose focus in the case, and class discussions lead nowhere. A teaching case can address different questions during a class discussion, but the focus needs to remain on a single issue. To address this issue, students may have to consider various elements in the case, analyze or synthesize some or all of them, and draw a conclusion.

For example[2], a fast-growing family-owned startup firm hired a professional sales manager to sell its high-tech agricultural machinery. Although the sales manager had an excellent track record in other industries, his performance at this firm was far from satisfactory. Disappointed, the owner of the firm had to decide whether to fire the sales manager, and what kind of person he should hire instead.

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[2] This example is based on Rotterdam School of Management teaching case *Ocron: Agribusiness Marketing*.

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The issue is not as simple as it might appear. To make the decision in place of the owner, you must first understand the following: 1) the required competencies of an effective technical sales person 2) the buying behavior in the agricultural industry compared to other industries 3) the uniqueness of family business compared with non-family business 4) the necessary conditions for a start-up to grow and scale. Each of these four aspects of the case situation must be thoroughly discussed in class before students can make an informed decision about firing the current sales manager and hiring a replacement.

After discussing all these aspects, students may reach the conclusion that firing the current sales manager is not the real issue. The real issue is: what kind of competencies does such a firm need at this stage of growth? What may first appear as an HR problem turns out to be a problem of business marketing. We call this face-value issue - whether to fire the current sales manager - the “immediate issue." The real issue - what kind of competencies does the firm's sales manager need at this stage of its growth - is called the “root issue”. A case may have different immediate and root issues, although this is not necessary. Sometimes what you see is what you get, sometimes not. But with one issue hiding another, the case becomes more interesting and challenging.

Protagonist(s): Most teaching cases have one protagonist and present the issue from the protagonist’s point of view. Depending on the nature of the issue, the protagonist can be any stakeholder involved, such as the CEO, CFO, sales manager, marketing manager, HR manager, etc. It is not, however, advisable to make the protagonist an external consultant. After all, a consultant still looks at the situation from an outsider’s point of view – it makes a huge difference whether one makes their own decision or gives advices to others.

The advantage of a single viewpoint is to focus students on the most relevant information and give them a clear direction for action. But sometimes a case can have more than one protagonist with multiple perspectives if the contradicting or conflicting views are equally valid and important in class discussion, such as the key stakeholders in an event who have a conflict of interest. If the views are not contradictory, then there is no need to introduce various protagonists; one “spokesperson” is enough. If you choose to use multiple perspectives, then all viewpoints count, and writing such a multi-perspective case will be more complicated. You may consider letting students play different roles, each role

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representing one distinctive viewpoint, so that the student may grasp the issue from all perspectives.

Time point: The protagonist is confronted with the issue at a specific time point. Anything you write into the case should be *before* the time point, even though you may already know what happens after that point. The purpose of focusing on a specific point in time is to simulate real-life decision-making. When you have to decide, for example, to buy a stock or not, you do not know at that point if the stock will go up or down. What you have are only historical data on which to base your decision. It is the same for a case: when the protagonist needs to decide something, he or she cannot know more than what has happened up until that point in time. So in writing a case, you can only describe events and exhibit data until that cut-off point. Since most teaching cases are written retrospectively, it is important to remember to identify such a decision time point or deadline. Happenings beyond that point – evolvement of the event, new financial data, quotes of things said later, etc. – can be included as an epilogue in the accompanying teaching note or as a follow-up "B" case that explains how the organization actually resolved the issue described in the initial "A" case.

Action trigger: To have a decision time point is not enough. Students who use the case have to feel that they are impelled to take action to resolve the issue. An action trigger makes the case issue more pertinent and urgent. Students who can feel the responsibility and stress experienced by a decision-maker will be truly engaged in the case, and lively class discussions are sure to follow. For example, how can a case on business growth be made more compelling to students? A case question, such as how to design a strategy to ensure sustainable growth through the future, does not provide a proper action trigger; but a more clearly-defined question, such as how to keep growing in a highly competitive market while dodging a likely takeover bid amidst a high level of employee unrest, does. In the first phrase, it is unclear what will become of the organization if no action is taken; whereas in the second phrase, it is obvious that something has to be done before competition devours the business or its employees go on strike. Action triggers can include such dramatic events as upcoming board meetings, announcements to shareholders, a takeover bid, or a pending employee strike; they can also include sudden opportunities or threats, such as a rising

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competitor or a product breakthrough or technical innovation. Action triggers are constantly present in business environments and add to the real-life, stressful atmosphere which prompts many business decisions.

The issue, protagonist, time point, and action trigger are the absolute essentials to a decision-focused teaching case. Without any one of them, the case would not work.

Look at the example below:

> *Harley Davidson's mission was to design and manufacture premium motorcycles for the heavyweight market. Each model among its products was highly customizable, made to order to customer specifications, creating a Harley Davidson mystique. Harley Davidson specifically targeted a narrowly defined market of middle-aged males with disposable income. However, as US baby boomers aged, the company recognized that it must look to new markets and demographics to expand sales.*

Is this an effective case? The issue itself is quite interesting (finding new markets and demographics to expand sales), but many students have said that the case is quite broad, and they have trouble relating to the issue. Their trouble is not surprising because the case lacks a protagonist, time point and action trigger. The result is that it resembles a consulting project rather than a case that draws students in and compels them to make a decision.

Now compare it to this example:

> *Symbid, a Dutch crowdfunding platform, was seeking to expand into the US market in 2013 after President Obama signed the JOBS Act to legalize equity-based crowdfunding. Confronted with substantial competition and limited resources, the startup had only one shot to perfect its entrance strategy. Should it adopt a niche marketing strategy directed at female entrepreneurs, or should it follow a mass marketing approach to target the entire United States?*

This example includes all the four building blocks. Does it read better?

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Although the issue, protagonist, time point and action trigger are considered the four "essentials", they alone are not sufficient for writing an effective teaching case. In Part 2 - Content - you will discover the other important elements in decision-case writing and will be asked to do some exercises.

2.4 Case plan

When you have a clear concept in mind for your teaching case, it is time to make a case plan. A case plan is a guide that can help you navigate through data collection, interviews, and writing, so that you will not get lost in overwhelming information. But a case plan is not just for yourself, it is also for coordinating the team (if other people are also involved in data collection and case writing) and for informing the case organization of your intention so that they can cooperate with you in case development. Below is the template of a case plan:

Teaching Objectives • 3-5 bullet points
Target Audience • Who will be using the case?
Preliminary Case Focus • A short description of the case that contains the 4 essentials
Preliminary Discussion Questions • A list of 6-10 questions
Data Needed • A list of data required
Data Collection • A list of data to be collected by desk research • A list of data to be collected through interviews

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Schedule • When do you plan to do desk research? • When do you plan to do interviews? • When do you plan to produce a draft? • When do you plan to finalize the case and teaching note?
Outcome • When and where do you plan to teach the case? • When and where do you plan to publish it?

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3.0 Part 2: Content

Case writing is the art of data management.

Once you have the *Concept* of a case, you can start to create the *Content*. This requires carrying out desk and field research, organizing the data collected, and writing up the case and accompanying teaching note.

Before elaborating on how to create good content, we first need to look at what makes a good teaching case. Below is a summary of some essential points already covered:

- A target audience
- A clear set of teaching objectives
- Well-designed discussion questions that match the teaching objectives
- An important focal issue
- A believable protagonist
- A well chosen time point
- An action trigger

Although essential, these attributes are not sufficient. A good teaching case should also:

- Showcase a "hot" topic with broad relevance that provides useful generalizations
- Be based on companies and brands that are familiar to the audience
- Provide just enough data to tackle the issue
- Contain controversy
- End with a cliffhanger
- Be well-structured and easy to read
- Provide a clear teaching note with concrete instructions
- Not be too long (a full-length case excluding the teaching note should not exceed 5000 words)

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Additionally, cases about companies in emerging economies are especially popular due to a lack of cases that take into consideration the complexities of running businesses in non-Western countries.

3.1 Data sources

Case content usually comes from two sources: field research and desk research. A case based on field research is called a “field” case, and that based on desk research is called a “library” case. These two data sources are not mutually exclusive: a case can be based on either of the sources, or both. In fact, many field cases also include data from the “library”.

The third less common data source is generalized experience, which means the author created a fictional piece of work based on his experiences with real people in real business situations. This kind of cases is called “armchair” cases. An “armchair” case is not a disguise of what happened to a particular organization or person, but a reflection of a general problem faced by different companies or people.

This book focuses on writing a case using field and desk research data, but not generalized experience. This is because most case publishers and competitions only accept cases based on real companies, with identifying data sources, even if the organization is disguised in the case. Also, the techniques of writing a case based on field and desk research data are the same techniques as those used to write a case based on generalized experience.

If you have access to a case organization and the freedom to write your case (the organization does not censor information), you should not hesitate to write a field research case. A field research case has the advantage of getting into the thoughts of the protagonist, which a desk research case can never achieve. Moreover, it can give more realistic details of the organization, depict the dynamics of the organization, and show the trickiness or fuzziness of a real-life business situation. Because of these qualities, students generally enjoy discussing a field research case, especially one that involves them in the situation and makes them feel part of the story.

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But a field research case also has its disadvantages. Many companies want you to only write positive stories about them. They either do not tell you the whole story or they do not sign off the release for you to publish a case containing negative information about them. This can be problematic, because a good teaching case always revolves around an issue. The more sensitive the case issue is, the harder it is to obtain an organization's cooperation. This problem is especially salient in emerging economies where case-method-based teaching is still new. Companies in emerging economies are generally more protective about themselves than Western companies and less inclined to play a part in case development. There are several solutions to this problem:

1. Frame the case issue as a *challenge* rather than as a problem. Sometimes just some rephrasing can make a case sound neutral or even hopeful. Try to get your readers to look into the future, take up the challenge, and find solutions to remove the obstacles to success, rather than focusing on what has gone wrong in the past. These forward-looking and backward-looking perspectives are essentially about the same issue, but psychologically, give readers different feelings.
2. If the case issue is already resolved in real life, then you can create a *turnaround case*. In the case itself, you still focus on the issue and leave readers with a cliffhanger: if you were the protagonist, how would you solve the issue? But the case does not end there; a "B case" follows to show the organization's actual – successful or innovative – solution. Students can compare their solutions to the organizations.
3. Disguise the information that can be used to identify the organization and the interviewees. This includes using fake names for the organization and the people appearing in the case, and creating fake financial data (often multiplying all the numbers by a small amount, e.g. 1.3, so that the data still make financial sense). If this is still not sufficient, you may consider disguising information about the industry and competitors. However, with such a case in which all important information is disguised, the case may read as too hypothetical and might therefore lose its appeal.

If none of the above methods work, you can consider writing a desk research case: i.e., using only data from published sources. A desk research case, no matter how sensitive the topic is,

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does not require an approval for release from the case organization. Although it lacks juicy details as in field research cases, it has the advantage of remaining intellectually independent. Also, a good desk research case must present an organization and issue that are publicly known. Neither the organization nor its issue needs to be high profile, but the information available in the public domain should be sufficient to support the development of a case. Otherwise, the case will be flimsy and students will not have the data required to resolve the case. For this reason, most desk research cases are about large, publicly-listed companies. It would be difficult to write a case about a little known startup based entirely on desk research.

One last method is to rewrite part of the case to accommodate the organization's wishes on the condition that these changes do not compromise the case's objectivity and authenticity. In no way should a case writer write PR material to make the case organization look good, and this must be made clear to the organization from the very beginning of a case writing project.

3.2 Getting in touch with case organizations

Although it is possible to write a good "library" or "armchair" case, a field case usually comes down better in class discussion and is more exciting to write about. Interviewing relavant people to get "insider information" is necessary for writing a field case. When you propose interviews to an organization, they would certainly want to know what is in it for them to cooperate. An organization can expect three kinds of benefits, depending on the nature of the case:

- Enhance the brand name – a case, if widely used by educational institutions and businesses, can be a highly effective medium to showcase an organization's best practice, expertise, or innovation.
- Improve organizational learning – an organization can use a case as internal training material to reflect on its effective or ineffective practices and decisions.
- Aid managerial decision making – a case can provide a 360-degree helicopter view of a complex issue, which helps management to make difficult decisions.

The organization would also want to know how much time investment is expected of them

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since developing a case study is an additional activitiy for them beyond regular business. You can give them a realistic estimate of the time they need to invest for receiving interviews, commenting on case drafts, and authorizing case release. Depending on the complexity of the case, this can add up to 10-20 hours, or even more.

Similarly, the organization would want to know how you are going to use the outcome of the interviews. It is also fair for them to expect that the exclusive information they provide you will not be used against their interest. You should guarantee them that the information is only used for educational and research purposes. You can also propose signing a confidentiality or non-disclosure agreement (NDA) between the two organizations to guarantee good conduct on your part. Most large corporations have such a standard document, but if your counterpart does not have one, please be sure to establish a written agreement with them, even if it is only an email.

The initial meeting with the organization ideally should take place after you have a preliminary case concept (*see section 2.0*) but before it is finalized. You should use the meeting to check whether your understanding of the organization is correct and whether your case concept is viable. In some cases, your case concept – based on what you have read and heard about the organization – does not reflect the real challenges the organization is facing. Then you need to revise your plan and agree on a new case concept with the organization.

It is always helpful to bring a copy of a similar case to show at the meeting, so the organization will know what to expect out of this project. The initial meeting is also for establishing an agreement for future cooperation and to set an action plan. It is important to have a contact person at the organization who can oversee the coordination later. It is also useful to inquire about any internal documents you may use for preparing case writing.

To summarize, here are the few key things to pay attention to when contacting a case organization:

- Share your case concept with the organization
- Specify the type / amount of information you require
- Make clear the boundaries of your research activity

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- Present an example of a similar case
- Ask if a non-disclosure agreement (NDA) needs to be signed
- Identify the people in the organization you need to interview
- Make clear how much time / commitment is involved
- Explain publication process / distribution of the case
- Invite to case teaching session? Other input?
- Give assurance that the case will not be released until authorized
- Check who needs to authorize
- Confirm willingness to edit in response to the organization's feedback
- Make clear the time involved
- Check whether the organization, interviewees, and industry need to be disguised
- Request that the organization agree on a provisional case release

3.3 Conducting interviews

After the initial meeting, you should prepare a case plan and send it to the organization to arrange interviews. The case plan includes your teaching objectives, the case focus, an outline of the case, what information you wish to obtain from the organization, and how you will use the outcome of the interviews (*see section 2.4*). Be sure to suggest interviewing people with different perspectives, not just the ones from within the organization. For example, for a strategy case you may want to talk to customers, competitiors, regulators, etc. if they are important stakeholders in the case.

Since case development is seldom the priority of an organization, setting up interviews by yourself may be complicated and time consuming. You may suggest several names, but it is best to leave it to the organization to decide to whom you should speak – they know their own people and connections much better.

Before you get into an interview, be sure to do your homework thoroughly. If the information is already publicly available (such as organizational background, history, mission and vision), do not waste your and your interviewees' time to ask again. Make the best use of the precious interview time you have and develop an interview guide of key questions.

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Small things should never be ignored either. For example, dressing appropriately, familiarizing with the location in advance, and being on time.

You need at least two interviews (each about an hour) with the protagonist: the first to get a good understanding of the case issue, and the second to clarify vague points and ask in-depth questions following the previous interview. For the first interview, you should list out the questions you would like to ask. But it is not necessary to strictly follow this list, as answers often lead to more and deeper questions: often you do not get satisfactory answers where you hoped but get interesting or even inspiring answers where you did not expect. As an interviewer, you must learn to improvise. But be sure to keep time: some interviewees are less structured than others; when they drift away, do not be shy to pull them back. Try to raise concrete questions and ask for examples – during the first interview in particular, the interviewee tends to give "correct" official lines.

There is no such thing as a stupid question provided you have done your homework. But remember, interviewing is not about you. So minimise your own vocals, avoid stating your opinions or judgements, and let the interviewee(s) talk. Active listening is the key, which means carefully following what is being said and asking the right questions. Ask open-ended questions (who, what, why, when, where, how, describe, can you explain…) when you want to explore the subject; ask closed-ended questions (yes/no answers) when you want to clarify a fact. If you do not quite get what is being said, rephrase it and ask if your understanding is correct. Summarizing is an effective tool. After a few questions, you can summarize the information to acknowledge the other's input and maintain focus.

It is advisable to tape record every interview so you can concentrate on listening during the interview and ask thoughtful questions. But do ask permission for recording before you do it. Do not wait for too long to transcribe the recording – you can easily lose the fresh impression within a few days. When transcribing the recording, you can already highlight those sentences that can be powerful quotations (*see section 4.1*). Sometimes, you can also hear the opening or closing sentences from the mouth of your protagonist. If this happens, be sure to write them down immediately. Since these are so loud and clear that they strike you, they will not escape your readers either.

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There are a few common pitfalls you should be careful to avoid:

- Not taking enough time to connect with the interviewee(s)
- Pretending you understand a particular point which you do not
- Sticking too much to your own agenda or list of questions
- Asking a series of questions all at once - questions should be asked one at a time
- Asking double-barrelled questions, where one question deals with more than more issue
- Forgetting to watch the time
- Neglecting to mention the next step at the end of an interview
- Failing to transcribe the interview recording quickly

3.4 Teaching case

Now that you have done your research and collected enough data, the next step is to organize these data in line with your teaching objectives and discussion questions in the form of a case study.

Basic buildup

Case writing is creative work. As any experienced case instructor may notice, some cases are written like a thriller, others like a consulting report; some are full of dialogues and actions, others focus on facts and statistics. There is no standard way for you to tell your case story – you must be the judge of how best to reach your teaching objectives. But even though there is a lot of room to create your own case, most cases follow the same basic outline:

- The opening section
- The organization and industry background
- The case story
- The closing section

The opening section sets the scene and defines the issue. The body of the case works like a funnel, starting with the more general information (e.g. organization and industry

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background) and zooming into the specifics (e.g. departments, personnel, clients, business and interpersonal dynamics). The closing section reiterates the issue facing the protagonist and points out options.

Let's look at the different parts of a case – the opening, organization and industry background, case story, and closing – one by one.

Opening

The opening section is the most important part of a case. It not only focuses students on the issue at hand, telling them where they are and what they are supposed to do, but, if this section is well written, it also hooks students to the story, inviting them to read on. An inadequate opening, on the other hand, will lose students or confuse them. So no matter how well the following parts of the case are written, the opening determines whether a case will be fit for use or not.

In the opening section of a case, the six "W's" are introduced: *When and Where; Who does What; Why; and hoW*. You should tell who your protagonist is (name and position), what kind of decision he or she has to make, when and where this is happening (date and place), and why and how this is happening. The opening usually ends with the one or two key questions facing the protagonist that are at the heart of the case.

An effective case opening reads like the beginning of a thriller, making students eager to find out more. It should also be absent of clichés, such as, "X leaned back in his chair pondering the challenges his company was facing," or "Y paced back and forth in his office trying to make a very difficult decision."

The opening should not be too long because you will lose your students. It should not be too short because you can hardly set a convincing scene with a too brief description. There is no rule for how long an opening section must be, but usually it has several paragraphs and is no more than one page, single-spaced, or 500 words.

To help you write, here is a checklist for a good case opening:

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- Is the decision maker identified by name and position?
- Is the time of the case clear?
- Is the location of the organization identified?
- Is the issue, decision, problem or opportunity clearly identified and sufficiently interesting?
- What is the action trigger?
- Is it too long?
- Is it too short?
- Is it cliché?

Organization and industry background

The background section of a case is the easiest part to write, since you can usually collect quite a lot of information through desk research about the organization and the industry. The case organization also has no hesitation to provide you with official documents like brochures. The danger, however, is that you can easily stuff too much information in this section – the case is long and drags on, but much of the information is actually irrelevant to solving the case.

To prevent this problem from happening, case writers should resist the temptation to include everything they have or that they think might be interesting for students. Even though some information might be interesting or even valuable by itself, if it is not directly relevant to the teaching objectives and discussion questions, you should not include it.

In the background section, try to use tables and graphs wherever you can, especially for quantitative data. Tables and graphs are direct and easy to absorb, and can save space, so you will have more room for the more important part of the case, which is the narrative. Tables and graphs should present data directly relevant to the case. Use an appendix for data that is useful but less relevant, such as a historical timeline, balance sheet, newspaper reports, photos or videos.

Case story

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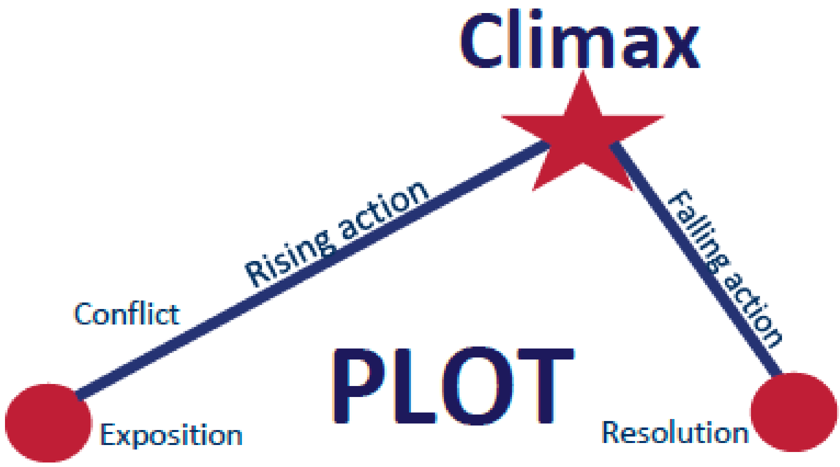
There are two fundamental structures that you can use to construct your case story. The first, and most familiar, is the *timeline structure*. Think of the novels, films, or TV series that you have read or watched. What do they have in common? In most stories, one thing leads to another, and often in a wrong direction. Tension builds until things finally explode. The main character(s) has to do something to get out of the crisis. After much struggling of the character(s), things finally settle down and the story ends, either happily or tragically.

In art and literature, this is called the "story arc," or simply, the "plot" (see the image below). Since the development of the plot is driven by the causal connection of events – what happens first and what happens next – the time sequence becomes crucial to understanding the story. This is called a "timeline structure."



With a timeline structure, the story does not have to be told chronologically; it can also contain flashbacks. In fact, the time sequence in most teaching cases follows this order: *Present – Past – Future.* The case opens by describing the present issue the protagonist is facing, then flashes back to describe how the issue came into existence and has evolved, and finally concludes by calling for actions to reach a desired future.

The second fundamental structure of a case narrative is the *spatial structure.* Unlike the timeline structure, the spatial structure does not focus on the plot, but on the factors that

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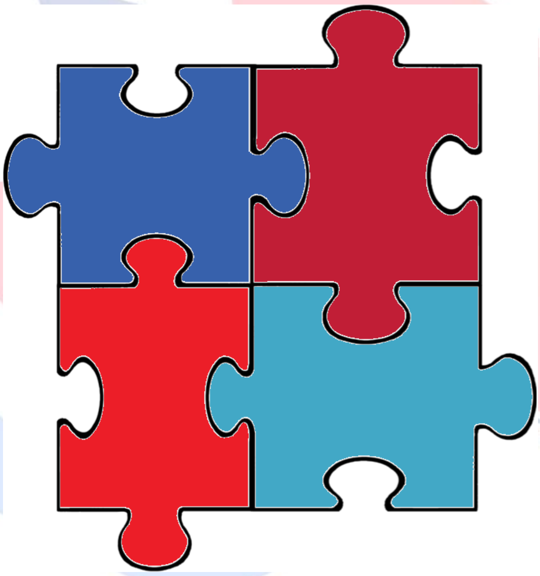
make up the situation. As the timeline structure is often seen in a drama, the spatial structure is often seen in a detective story: the detective enters a crime scene, collects evidence, and moves to another place to collect more evidence and so on, until he has enough evidence to solve the crime.

In this structure, events often happen in a relatively shorter timespan or simultaneously. What matters more are factors that make up the situation, rather than how the situation evolves. Like solving a puzzle, you have to collect all the pieces and connect them together. The case first describes the situation and the issue, and then gives out disconnected data: bits and pieces of information, or stories told from different views. Students must piece together the disconnected data to form a complete picture and reach a solution to the issue.



The two structures, timeline and spatial, are not mutually exclusive. A case writer can choose one structure or the other, or use both. The timeline structure comes more naturally to most people because it is more intuitive, closer to how we think and communicate in everyday life. The spatial structure is more analytical, closer to how we do research. If you choose to combine the two, you can consider using the timeline structure through the case and in certain complex parts, introducing the spatial structure to give out the data needed and describe the intricacy; i.e., to disclose hard facts within a plot. The other way around – to insert a plot in a puzzle piece – is more challenging, simply because of the limited space of a case. Even if you

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manage to do so, the result would be a rather long case, perhaps too long for students to manage.

Closing

The closing section gives a short summary of the case to reiterate the issue. Although phrased differently from the opening section, the closing section should nevertheless come back to the protagonist's perspective.

Apart from reiteration, the closing section also serves the function of pointing students where to go. It sometimes introduces several options as potential solutions, and other times brings in one or more new questions that are broader than the one(s) raised in the opening. Providing options for case resolution will narrow the scope of the case and can help students to focus their research and discussion. So it is more suitable for students with little real business experience. For more experienced students such as MBAs and executives, posing broader questions at a higher level can invite them to think more deeply and creatively, and find solutions to the "root issue" (*see section 2.3*).

Sections and headings

Once you have the content for the entire case, you still need to organize it into proper sections. Each section should give a distinct set of information. A section should not be too long. If it contains too much information, try to break it up into several sections.

Under each section, you can create one or several subsections. But there should not be more than one layer of subsections, as too many subsections will make the case structure fragmented and confusing. For example, under a section called "Competition" you can have subsections "Domestic Rivals" and "International Rivals", but do not break these subsections into even smaller sections.

Section and subsection headings can sound literary, as in a novel, or factual, as in an essay, depending on your preference. If you are not sure what headings to give to your sections and subsections, it is best to be factual because descriptive, straightforward headings can help students follow the case and locate data, which is most important.

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3.5 Teaching note

A teaching note is a document that accompanies a teaching case to help potential instructors gain insight into the case and achieve better usage of the case. A teaching case should only tell a story factually, without providing any interpretation, analysis, or learning. Therefore, a case by itself is incomplete. It needs a teaching note to show the meaning and function of it.

Although it is not a rule for every case to have a teaching note, cases with a teaching note are proven more popular than those without. The Case Centre (www.thecasecentre.org) statistics show that while only 40% of the cases in its collection have a teaching note, 95% of the best-selling cases have one. Almost all case writing competitions require both a case and an accompanying teaching note; the quality of the teaching note usually counts for 40% of the overall grade. It is fair to say that a case without a teaching note is incomplete, and thus, unlikely to reach its full value as an educational tool.

When to write a teaching note – alongside the case or after the case? Different people have different habits. Some write an outline for the teaching note, then write the case in full detail, and finally come back to complete the teaching note. Others write up the teaching note completely and then come back to write the case. Both methods are acceptable. However, writing up the entire case without even having an outline of the teaching note should always be avoided.

When writing a teaching note, it is crucial to remember that you do *not* write this for yourself but for other instructors you do not know. Not all of these "strangers" have the knowledge of your case topic or of the organization you describe, so you have to guide them step by step through the case: show them all the important details; explain, analyze, and synthesize the information; and demonstrate how to use the information in class discussion to maximize the learning value of the case. Some details that you think might be obvious in their analytical values still need to be highlighted and spelled out. The goal is to make it possible for fellow instructors to adopt your case without any additional research. You do not want them to email or call you repeatedly to ask questions about the case either.

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Teaching notes may vary in length: some are 20 pages and others are only two pages. But a good teaching note is always detailed and comprehensive. It is very difficult to deliver a great learning experience for students with a teaching note shorter than five pages.

A teaching note has many formats – there is no single standard, but some components are necessary to structure a teaching note:

- Synopsis
- Teaching objectives and Target audience
- Case analysis and teaching plan
- References

Synopsis

Like an abstract of a research paper, a case should have a synopsis to capture the gist of the case. When other instructors browse through online databases to look for a suitable case, they would first read the synopsis. So a synopsis must be concise and clear, summarizing the most important content of the case. The four essentials of a case – issue, protagonist(s), time point, and action trigger – must be in a synopsis (*see section 2.3*), but these are not enough. A synopsis should also give a brief explanation of the conceptual context of the case; that is, a summary of teaching objectives. Since a synopsis aims at concision and precision, it cannot be long. The ideal length is between 150 and 200 words.

Teaching Objectives and Target Audience

Teaching objectives explain the pedagogic purpose of the case and the target audience establishes the level of the case. They are also what an instructor looks at when they judge if a case is suitable for their teaching.

We already discussed teaching objectives and target audience quite extensively in *section 2.1*. There are a few additional points to note regarding teaching objectives.

There are knowledge, skill, and attitudinal teaching objectives. Knowledge objectives refer to

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analytical tools, frameworks, or theories of a field. Skill objectives relate to the application of knowledge. Attitudinal objectives mean that students will develop a more ethical or humane understanding about their social responsibilities as business managers after using the case.

Three to five teaching objectives are generally sufficient for a full-length case. These objectives should be general enough to be relevant to the course you are teaching. At the same time, they should be as specific as possible, and measurable, so that you can judge if your students have reached these learning goals after the course.

When writing a teaching note, you should always try to use precise verbs to formulate teaching objectives. Using precise verbs can make teaching objectives specific and measurable. For instance, if your objective is for students to *understand* a concept (knowledge objective), you can formulate the objective as "After discussing the case, students will be able to explain … [certain issue]." If your objective is for students to *analyze* a situation with a new tool (skill objective), you can formulate the objective as "After discussing the case, students will be able to demonstrate … [the way to solve a problem]." If your objective is for students to *appreciate* certain decisions (attitudinal objective), you can then say, "After discussing the case, students will be able to defend … [certain action] with arguments." Below are more examples:

Objective	Action verbs
Remembering	Define, duplicate, list, recall, repeat, reproduce, state
Understanding	Classify, describe, explain, identify, locate, select, translate, paraphrase
Applying	Choose, demonstrate, employ, illustrate, operate, sketch, solve, write
Analyzing	Compare, contrast, criticize, differentiate, examine, experiment, question
Evaluating	Appraise, argue, defend, judge, evaluate
Creating	Assemble, construct, design, develop, formulate, write

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Case analyses and teaching plan

This is the most important part in a teaching note. A common way to organize the teaching plan is to draw a detailed roadmap of discussion questions and ask students to answer these questions by performing in-depth analysis. This analysis can be seen as the “answers” to the questions.

There are four categories of questions:

- Questions to prepare students for the discussion (can also be listed as a separate section, Assignment Questions)
- Questions to open the discussion
- Questions to advance the discussion
- Questions to close the discussion

Asking the right questions is a science as well as an art. There should be a combination of open-ended and closed questions, using open-ended questions to stimulate discussion and closed questions to check whether students get the facts right. There should also be controversial questions to bring the discussion to a higher level.

Under each question is the corresponding analysis. In the analysis, you can suggest the application of relevant theories, models, and other analytical tools. Please remember always to refer back to the case, using the facts and numbers in the case to support your analysis. If you have included any financial data in the case, you should also explain it and its significance. The analysis should demonstrate at least one possible approach to answering the question. In most situations, there is more than one approach: you need to show the alternatives and indicate their advantages and disadvantages.

It is always advisable to create a *timetable* for the teaching plan: how much time is needed for each discussion question and how much is needed for the opening, closing, and transitions. If you notice any typical mistakes that students make in analysis during test runs of the case, you should also note them in the teaching plan and suggest how to guide the discussion when such mistakes occur.

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Other components

In addition to the standard components mentioned above, a good teaching note often includes the following:

- Teaching approach (whether the case can be used for written exams, role-plays, or combined with a video, etc.)
- Data collection (where the data are from and whether they are disguised)
- Assignment questions (for students to prepare before the class)
- Alternative analyses (e.g., an M&A case can be analyzed from strategic, organizational, financial, marketing and branding perspectives, to name a few)
- Alternative exercises (other exercises such as role-plays that instructors can assign students to do)
- Exhibits (e.g. board plan)
- Class feedback (how the case worked with different student groups and whether there were areas in the case where students lost focus on the main issue)
- Epilogue (actual outcome of the case situation)
- Broader lessons (general lessons drawn from the case)
- Recommended readings (other interesting books and articles than the ones already mentioned in the case analysis and references)

3.6 Case and teaching note templates

To summarize, the content of a case and its accompanying teaching note can be put in the templates below. These templates, however, are only for reference. When you actually write the case and teaching note, you can adjust the structure according to your own needs and styles.

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Case Template

Case Title • Fill in the title (and subtitle if any)
Case Opening • Set the stage of the case and serve as a "hook" to motivate the reader to keep on reading. You should tell **who** your protagonist is (name and position), **what** kind of decision he or she has to make or **what** kind of dilemma he or she is facing, **when** and **where** this is happening (time and place). • No more than 1-page, 1-3 paragraphs, single space
Section Title • List the content under this section • List the exhibits under this section • Use bullet points
Section Title • Same as above
Section Title • Same as above
… (more section titles)
Conclusion • A short summary of the issue and wrap up
Appendices • List other useful data that are not directly linked to the case, e.g. photos, videos, newspaper articles.

Teaching Note Template:

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Synopsis • An abstract of the case • 200 words or shorter
Teaching objectives • 3-5 bullet points • Try to be as precise as possible
Target Audience • Who will be using the case? Types and level of study
Data collection (optional) • Where the data are from and whether they are disguised
Teaching approach (optional) • Whether the case can be used for written exams, role-plays, or combined with a video, etc.
Assignment questions (optional) *Questions for students to prepare before the class*
Teaching Plan (with a Time Plan) *Questions to open the discussion* • 1-2 questions and brief answers or analysis • How much time do you plan to give to this set of questions in class? • Format of discussion: big group or small group discussion, role-play, etc. *Questions to advance the discussion* • Same as above *Questions to close the discussion* • Same as above

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Alternative analyses (optional) • e.g., an M&A case can be analyzed from strategic, organizational, financial, marketing and branding perspectives, to name a few
Alternative exercises (optional) • Other exercises such as role-plays that instructors can assign students to do
Exhibits (optional) • e.g. board plan
Class feedback (optional) • How the case worked with different student groups • Areas in the case where students lost focus
Epilogue (optional) • Actual outcome of the case situation
Broader lessons (optional) • General lessons drawn from the case
References • List of articles you will discuss in connection with this case or assign students to read
Recommended readings (optional) • Other interesting books and articles than the ones already mentioned in the case analysis and references

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4.0 Part 3: Communication

"In writing, you must kill your darlings." -- William Faulkner

As we discussed earlier, a good teaching case works more like a thriller than a scientific paper. In an atmosphere of suspense, a situation evolves with a sharp focus on a vital issue that has to be resolved or a vital decision that has to be taken. This focus must be clear so that students will be immediately drawn into the situation and know up front what they are expected to do.

A good teaching case is more than a business history. It has not only a sharp focus, but also a rich context, believable protagonists, and dramatic elements such as a dilemma or a conflict. The perspectives are presented in a balanced way: comparisons and contrasts are used to show different points of view.

All of the above makes a teaching case engaging to read. This section will take a look at how to present a case most effectively, so that you can make the best use of your data. Writing is essentially communication. A clear concept is the prerequisite and rich content is the basis. But to have a coherent and engaging case, you need to skillfully communicate the concept and content to your readers.

4.1 Case writing style and tips

Each case writer has his or her own writing style. But regardless of personal style, a few fundamental rules in case writing must be remembered. A case writer must use or provide:

1. An objective voice
2. Clear, direct, concise, everyday language
3. Just enough information and reasonable length
4. Details and quotations, only to emphasize
5. "Distorted" information and dramatic elements, to maximize teaching value
6. Layers, to make the case more challenging
7. No analysis in the case; the analysis is only in the teaching note

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First and foremost, a teaching case must be written with an objective voice. A case writer should take a neutral stance and make no biased statements. If you have to make any judgments or evaluations, or show emotions, then put them in the mouth of a protagonist. Watch out when you write a "best practice" case: be sure not to compliment the organization effusively. You should remain objective and let readers draw their own conclusions.

The language of a case should be clear, direct, and concise. Think of newspaper language, *not* academic language. Your readers are most likely to be students or non-academic professionals, so try to avoid using jargon and technical terms. When simple words are available, do not use complicated ones.

A case should not be wordy. Students often have difficulty absorbing more than 10 pages of content (or 5000 words). Try to limit the information in a case to "just enough" – not too much to be overly detailed and not too little to be skimpy – and organize this information tightly. A good case should be rich enough to allow students to break down the information for analysis and clear enough so that students can put the information together again to form a coherent solution. Ideally, only one point should be made per paragraph. This can also help students to navigate information and get a clear impression of the structure.

Many new case writers are tempted to use all of the information they have gathered because it all appears so relevant and valuable to them. True, all information has its own value and can relate to the case one way or another. But too much information can also clutter a case. Students would likely miss the point of the case, and worse, would get lost in the maze of information they have been provided, not knowing what is important or what they are supposed to do.

To prevent students from focusing too much on details and missing the bigger picture, you should be careful what information to include in your case. Details - financial, descriptive, or other - tend to slow the pace of the reader. As you do not want your students to trip over where they should move along, provide the details only when you want them to actually stop and pay attention. However, if your purpose is to make them comb through the data jungle, pick out valuable data from irrelevant, misleading or even false data, then you may

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give them an oversupply of details. But in this situation, you need to explain the design and the logic of doing this explicitly in the teaching note.

Quotations are also details. They can be powerful if used properly. Opinions, judgments, evaluations, or emotions that are awkward for a case writer to state can be put in the mouth of a protagonist. Words coming out of the mouth of your protagonist tend to have a greater impact on readers. But when a quotation is not strong or expressive enough, it should be left out or rephrased in your own words. Keep in mind that once you use a quotation, you must ask for approval from the interviewee before making the case public. Asking for approval can be tricky, so it is best to put your energy into the most valuable quotations.

To keep a case focused and of reasonable length, omissions, simplifications, enhancements, and downplay of some information are commonly used techniques. The ultimate goal of these kinds of "distortion" is to maximize the teaching value of the case. To emphasize your teaching objectives and focus on certain aspects of a case, you may need to highlight some information while giving scant attention to other particulars. The highlighted information is not necessarily more important than other information, nor is the downplayed information necessarily unimportant. Your teaching objectives should guide you in your manner of presenting the case.

Dramatic elements like a controversial topic, disagreement between stakeholders, a conflict of interest or personality clash between decision makers, are important for a teaching case. A good case gives a "Wow" feel – you know in advance it will generate heated debate and lead to multiple levels of analysis because it has dramatic tension. Case writing competitions often make "controversy" or "drama" one of the judging criteria. Many prize-winning and best-selling cases are not just educational but also dramatic.

If you want to make the case more challenging for your students to solve, the best way is to introduce layers of issues. The immediate issue posed in the opening is not the root issue that caused the problem. When students dig more deeply into the case, they should be surprised to find aspects they had not noticed before. To solve the case, they must first find the root cause before they can find a solution.

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A good teaching case is easy to read but difficult to solve. The clues to resolving the case are present but well hidden within the text. It is up to students to use the tools and theories they have learned and the information provided in the case to perform analysis and come up with solutions. Therefore, a teaching case should never include analysis or lessons learned, which belong to the accompanying teaching note. To avoid compromising the learning outcome, you should also avoid giving obvious directions to the solutions of the case. You may consider giving them hints to nudge them in a certain direction. But please explain your intentions in the teaching note, showing what the hints are and how to use them to direct students in class discussions.

To summarize, clarity and effectiveness are the top priorities for case writing. There are no rules for how long your case must be or how it must be written. A clear and effective case can read like a novel or like a report; it can be 13 pages or just 3 pages.

In recent years, however, mini-cases (2-5 pages) have become increasingly popular. They are often snapshots of scenarios. Because of their smaller size, they can easily fit into a curriculum and are attractive to students. Several mini cases can also form a set of cases that addresses a more complex issue. For instructors who want to have manageable teaching material and are concerned with its comprehensiveness, mini cases are a good choice. *Section 5.2 discusses writing mini cases.*

4.2 Case writing conventions

Apart from the stylistic rules, there are several conventions in case writing. Although it is not an absolute requirement to follow the conventions, case publishers often insist on them. So for pragmatic reasons, it is best to stick to these conventions:

1. Use the past tense consistently.
2. Use single space.
3. Refer to protagonists by their last names.
4. Introduce a protagonist the first time with his or her full name; thereafter, use only the last name.

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5. Do not capitalize position titles.
6. Number exhibits and refer to them within the text at appropriate points.
7. Use title and section headings.
8. Use appendices for information not directly part of the case.

The first convention is most troublesome for new case writers. They do not understand why they have to write a contemporary case story in the past tense. The reason is quite simple: situations are always evolving, and a true statement now may be false in a few months when the case is used. For example, a number one company in the market may no longer be the leader in the next quarter. The technique of consistently using the past tense ensures that the case will remain relatively timeless. The trick is to set a time frame for the case from the very beginning. For example, when you talk about "Company A is the market leader," you can rephrase the sentence into "at the end of 2016, Company A was the market leader." Also, try to avoid words like "currently" and "presently." Instead, use concrete time frames like "in December 2016." When you have qualified the time, the awkwardness of using the past tense that many case writers complain about will disappear.

4.3 Editing

After you draft the case and teaching note, it is time to edit them. Like writing a case, editing a case is also reverse engineering. Work backward from the teaching objectives and discussion questions, and check whether the case includes adequate information to address them. You can use the following questions as a guide to editing your case:

- Is the information sufficient to support a lively discussion with possible variations of solutions?
- If yes, is it clear enough with no needless details muddying the presentation?
- Are there any colorful quotes you can use to enhance the case?
- Is the case easy to read?
- Are the grammar and spelling correct?
- Are the exhibits numbered and references cited correctly?
- Have you followed all the conventions?

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A good method to test whether your writing works or not is to read the case aloud to a family member who has little knowledge about the case topic. If the family member can follow it, then you can safely use it on your audience.

There are also two classic guidebooks on writing: *The Elements of Style* by Strunk and White, and *On Writing Well: An Informal Guide to Writing Nonfiction* by Zinsser. They are valuable for not just case writing, but any kind of non-fiction writing.

4.4 Common pitfalls

In previous sections, we talked about how to write a case and teaching note most clearly and effectively. In this last section, we summarize the common pitfalls in writing a case or teaching note as a final reminder of what to avoid.

Teaching case pitfalls:

- No clear focus
- Too much detail
- Lack of structure
- Lack of context
- Unspecified actors
- No controversy
- Many jargons
- Acronyms not spelled out
- Theories in the case

Teaching note pitfalls:

- Skimpy
- Too general teaching objectives
- Too many or too few teaching objectives
- Case analysis doesn't match case content
- Case analysis copy & paste from the case
- Not enough open or closed questions

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- Not enough controversial questions
- Discussing a theory without a purpose
- No answers, pointers, or analytical tools provided

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5.0 Part 4: Conclusion

A good teaching case must have three solid anchors: *Concept, Content, and Communication*. They work like a tripod making a case stable. The concept of the case must be clear: a sharp, thought provoking issue plus well-defined goals of learning. The content of the case must be rich: an interesting, realistic situation that has enough details to allow exploration and discussion. The communication of the case must be engaging: a well-told story that gets readers to identify with the protagonist and to care about his decision.

A good teaching case is incomplete without a good teaching note. If a case is a fascinating landscape to explore, the accompanying teaching note is the map or navigation system. Without a teaching note, you can only scratch the surface of the case or get lost in the wilderness. A good teaching note gives clear instructions on how to use the case, suggests well thought through questions to help dig deeper into the case, and provides sound analyses of these questions. If the teaching note can give more than one route to navigate the case, it will make the case even more exciting and help reach an even wider audience.

If we look at popular cases in the world's largest case database, The Case Centre, we would notice that the quality of the cases themselves and of their accompanying teaching notes are equally important. Apart from what we have mentioned before, several other qualities can also increase the popularity of a case:

A current hot topic with wide interest. This makes the case easy for students to relate to and is sure to start a heated discussion.

An emerging economy. This can be about an international company entering or operating in an emerging economy, or about a local company operating in the emerging economy or trying to expand internationally. The business environment and management practices in emerging economies, for example in Turkey, can be very different from that of a developed Western country. There is a great need to learn about business in emerging economies, but the good quality cases currently available are not enough to satisfy this need. This gives case writers in these countries an opportunity to fill the gap.

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The body of the case (excluding exhibits and appendices) is shorter than 10 pages, or even only 3-4 pages. A common problem facing instructors is that students do not all read the case before coming to class. One way to encourage them to read the case is to make the case interesting, and the other way is to make it relatively short and easy to digest. This does not mean, however, making the case simpler and less challenging. It only means that when writing the case, the case writer must be careful not to give too much intricate information at once. If the case is indeed too complex, then it should be broken up into several mini-cases (*see section 5.2*). Please also keep in mind that the length of a case does not correspond with the length of a teaching note. A shorter case, especially, needs a lengthy teaching note that can fully explain how to use the case and what lies hidden under the surface.

The teaching note includes role-plays, exercises, or assignments. This gives instructors more repertoires in teaching, but the user instructions and grading criteria of these role-plays, exercises, and assignments have to be crystal clear.

5.1 Case release

Before submitting your case and teaching note to a case publisher for release, you need to get the case organization to sign off on the content. They will check whether the facts and figures presented in the case are accurate, whether there are distorted views in the case, and whether the quotes are true to what was being said.

In most situations, if the case organization knew that the case was meant to be made public and has been cooperative in interviews, they will not object to the release. But occasionally, it happens that the case organization changes its mind while the case is being written. Especially if the final draft of the case is so good that it touches the pain points of the organization, the case organization that earlier agreed to make the case public may withdraw its permission. There is always the risk of having spent months writing a case, but not being able to get permission for release.

If this happens, you still have a few options. You can rephrase the problem as a challenge, introduce a “case B” to show the organization’s successful or innovative solution to the problem, or disguise identifying or sensitive information about the organization. If none of these works, you may consider turning the case into one that is based entirely on desk research data, or rewriting part of the case to accommodate the organization’s wishes on the condition that these changes do not compromise the case’s objectivity and authenticity *(see section 3.1 Data Source)*.

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Below is an example of a case release document that you can adapt to suit your situation.

Dear Mr. / Ms. XXX,

We very much appreciate your cooperation over the past three months in allowing us to talk to various people at your organization. On the basis of these interviews and the material you provided, we have prepared the case study entitled XXX. We hope this case reflects the key issues that your organization had to address without revealing any confidential information.

Would you or the authorized person of your organization sign and return a copy of this case release document to declare that the undersigned has read the case study mentioned above;

understands that XXX University may test the use of this case study in a classroom environment and that as a result of this use, the case study may be modified, but not in a material way; agrees that the case study is substantially correct and may be used for educational purpose at XXX University and other institutions;

agrees that the authors of the case may change the case study from time to time to correct typographical and grammatical errors, rearrange paragraphs and exhibits, and enhance its use in a classroom environment;

I have the authority to sign and execute this case release form,

Name:

Position:

Organisation:

Address:

Date:

Signature:

Apart from arranging a case release, you should also prepare the metadata that case publishers usually require to process the case. The metadata generally include:

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Author information: name(s), affiliation(s), contact(s)

Case type: based on field research, published sources, or generalised experiences

Case category: strategy, finance & accounting, marketing, organizational behavior, entrepreneurship, supply chain & operations management, business information management, etc.

Case story general background information: industry, country or region, year or time period, etc.

Keywords or phrases

Abstract

Teaching objectives

Supplementary videos or slides

5.2 New trends of cases

In recent years we see two trends of teaching cases:

1. *Cases are getting shorter.* Traditional Harvard Business School cases used to be roughly 30 pages long. Now only very few cases, even from Harvard, are this long. Mini-cases, or caselets, on the other hand, have become increasingly popular. Due to their smaller size and focused approach, mini-cases do not erode a class schedule, and are relatively easier to develop and to teach. They can be a useful supplement to, or even a replacement for, traditional comprehensive cases.

2. *Multimedia cases are becoming the new standard in teaching cases.* Even though paper-based cases are still the mainstream, many of them now have video supplements. Additionally, instructors and their institutions that have sufficient resources and faith in the effectiveness of multimedia cases are investing heavily in developing web-based cases that include text, videos, audios, and animations. Serious gaming – the most technologically and financially demanding cases to develop – are also on the rise.

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When instructors develop their own cases, it is difficult to ignore these trends. Indeed, these trends have a profound impact on case size and format. But a serious case writer should never blindly follow trends. You must first ask yourself what you want to achieve: are smaller size and a format enabled by new technology beneficial for your teaching objectives? If the answer is yes, then by all means follow the trends. If the answer is "not sure", then a paper-based case is equally good.

Once you have decided to write a mini-case, you need to keep several things in mind. Even though a mini-case is shorter than a regular comprehensive case, it still contains all the essential building blocks of a regular case, namely the issue, the protagonist(s), the time point, and the action trigger. A mini-case also has its teaching objectives just like a regular case, but the objectives can be fewer and more focused. Often a mini-case only tackles one main question and addresses one specific topic in management theory or practice.

To develop a multimedia case is a much bigger commitment. Before you jump into making a multimedia case, you have to make sure that you have (1) plenty of financial resources, (2) a supportive organization behind you, (3) a sophisticated IT team, and (4) an editorial team experienced with developing online and video content. Making a multimedia case is team effort. Your role will be more of a producer than of a writer. Without the collaboration from various sides, you will not be able to make a good multimedia case. But foremost, you yourself must have great curiosity in developing such a case, strong conviction that it will work in class, as well as the patience to go through the cycle that is much longer than writing a regular case. Because a multimedia case takes a long time to develop and is expensive to make, you must make sure that the content will not become less relevant or less exciting in a few years' time. So, choosing what to develop requires serious thinking. For more about multimedia cases and the use of the case method in general, please refer to *Case Teaching Guidelines Book and Quick Reference*.

5.3 Cases in non-Western countries

The case method, invented by the Harvard Business School a century ago, has since been adopted by the rest of North America and Europe, and is currently spreading to many non-

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Western countries. Countries like China, India and Turkey, whose classrooms traditionally use the “sage on the stage” approach, are now moving towards more interactive, student-centered, and problem-based learning – or the “guide on the side” approach.

Instructors in these countries have also started to develop their own cases that deal with business challenges embedded in their cultures. For anyone who develops cases with students from these countries as the target audience, it is important to remember that “a good case is one that is personal”[3]. So resist the temptation to copy a successful or classic Harvard case and instead, develop your own. Even if it takes much longer, it will be worth the effort.

It is also important to bear in mind that students who were raised in a “sage on the stage” learning culture would still expect to “learn” from a case instructor. If a case discussion is too open-ended and there is no obvious conclusion, the students may feel confused or even “cheated”. One tip is to adapt the teaching note to include key takeaways: sometimes just a few bullet points to wrap up the essense of the discussion can achieve great perceived learning outcome.

To conclude, let me thank the Case study Alliance Turkey (CAT) Project for creating a platform that allows this case writing guidelines book to be written and disseminated. I would like to express my gratitude to CAT for promoting the case method, creating a lively case community in Turkey, and encouraging the development and use of locally-embedded cases. I would also like to offer my best wishes for the development and dissemination of many timely and quality case studies on Turkey. For further details about this project please see www.cat.ba.metu.edu.tr

[3] Professor Abel from IMD.

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Quick Reference guide

Ten Questions to Ask Yourself Before Writing a Teaching Case

You can only write clearly if you think clearly. Before you begin writing a teaching case, it is advisable to ask yourself 10 sets of questions that can better prepare you for the writing:

1. How does the case fit into my teaching? What are my teaching objectives? What key discussion questions do I want to bring into the classroom?
2. Who will my audience be? How difficult should my case be?
3. How fresh is my case topic? Do similar cases already exist? Have I done an Internet search?
4. What type of case do I want to write? A field case, a "library" case, or an "armchair" case? A full-length case, a mini-case, a case series, or a multi-media case?
5. What is the decision focus of my case? Who will be my protagonist? Why is his or her decision urgent?
6. Does the case include controversy, contrast, conflict, dilemma, or other dramatic elements?
7. What are the standard components of a case? How shall I open the case? What sections shall I create thereafter? How shall I close the case?
8. What data do I need to complete a case? Do I need interviews, and if so, how can I get an organization to cooperate on allowing interviews?
9. Within what time frame do I want to finish the case? What if I experience a writing block?
10. In what style shall I write a case? Which writing rules should I follow? Do I have any tips for editing the draft?

How to Write a Good Teaching Case

1. How does the case fit into my teaching? What are my teaching objectives? What key discussion questions do I want to bring into the classroom?

The teaching note comes before the case. When you set out to write a case, you must have a

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clear idea what purposes the case serves in your teaching and how you want to use it. Please make a list of the teaching objectives you want to achieve with the case. Then make another list of several key discussion questions with analytical tools that can help answer these questions. If you want to link the case to theories, please make yet another list of the theories and relevant readings. After you have done these, you already have the skeleton of a teaching note. While drafting the case, you may be overwhelmed by raw data – a preliminary teaching note can help you decide what to include and not include in the case. A case writer usually drafts the case in parallel to the teaching note. You need to compare them from time to time to ensure your teaching objectives and discussion questions are covered by the case and that the case does not contain too much irrelevant information compared to your teaching plan.

2. Who will my audience be? How difficult should my case be?

Are your students undergraduate or graduate? Are they MBAs or executives? Depending on the level of your students and the type of study they are following, you should adjust the approach to the case as well as the difficulty of the case.

A practical case usually goes down well with MBA or executive students, and bachelor- master- Ph.D. trajectory students may find it easier to accept a case with more theoretical emphasis. Undergraduate students may be less familiar with business life than graduate students, so the case writer should include more background information in the case or suggest prior readings.

There are three levels of case difficulty. You have to decide which level your case should be before setting out to write it.

- Level 1 (simple): state the protagonist’s solution to a problem and ask students to analyze whether it is effective.
- Level 2 (medium): present the problem facing the decision maker and have students come up with solutions.
- Level 3 (difficult): describe the situation that the decision maker is in and have students figure out where the problem lies and provide solutions.

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3. How fresh is my case topic? Do similar cases already exist? Have I done an Internet search?

What makes a case "fresh" is not necessarily how current the information is, but how unique the case focus is. Although cases about the latest happenings are preferred, a relatively older story can also be "fresh" if no one has written about it. Multinationals, high profile start-ups, and recent media hot topics often catch a lot of attention from case writers. Before you decide to write a case, it is advisable to search on www.thecasecentre.org to see if similar cases have already been published.

4. What type of case do I want to write? A field case, a "library" case, or an "armchair" case? A full-length case, a mini-case, a case series, or a multimedia case?

A case can be written based on field research, published sources (a "library" case), or generalized experiences (an "armchair" case). A field case is preferred over a "library" or an "armchair" case because field research can give insight into an organization that a "library" or "armchair" case can rarely achieve. Some case writing competitions also state that they accept only field cases.

A "library" case is developed with published information from annual reports, newspaper, research articles, Internet, etc. It is an easy, efficient, and "safe" way to develop a case. Because you do not need interviews with an organization, you can collect data relatively fast and from wherever you are. Also, because you do not need to get permission from the organization to release the case, you can be certain that once the case is written, it can be published.

An "armchair" case is based on generalized experiences. This is not the main stream of teaching cases. Most "armchair" cases are written to provide the introduction to a course, and often with a fictional story and characters. For instance, an MBA program teacher wants to introduce the topic of cross-cultural leadership and invents a case about an American manager leading a team of six people from different cultures and experiencing frustrations.

A full-length case is usually 8 to 15 pages long and single-spaced, excluding exhibits and

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appendixes. However, the current trend is to have shorter cases. Case clearing house records show that cases between 8 and 10 pages sell best. Some case competitions make it explicit that they do not accept cases of more than 5,000 words. The demand for mini-cases (2-5 pages) is on the rise; mini-case series are equally popular. If you have the resources, a mini-case, accompanied by a video clip, works amazingly well. Cases with visuals are always stronger than those with only words, which is why figures, tables, pictures, and videos are useful.

5. What is the decision focus of my case? Who will be my protagonist? Why is his or her decision urgent?

The decision focus is the focal point of a case: the case story revolves around it. Without a clear decision focus, a case will not work. To determine whether a decision focus is clear, you can ask yourself the following questions:

- Does it serve my teaching objectives?
- Is it specific enough? A decision focus should be situation-specific and concrete; it cannot be vague or abstract.
- Is it general enough? A decision focus should also support a deeper and broader discussion and can serve as a general lesson on how to approach issues of similar type.
- Is it urgent enough? A decision focus should be of immediate importance. The decision maker should have a "deadline" to resolve the issue.
- Is it the only one? Real-life business situations are complex: You may be tempted to include various issues in one case to remain true to facts and show students the intricacy of actual business. But remember: do *not* try to kill many issues with one case. You must focus on one issue only and the decision behind it. During classroom discussion, this focal issue will lead to many sub-issues. If you can explore the focal issue thoroughly, you already will have covered a wide range of questions and the complex decision-making processes behind them.

The decision maker in a case is the protagonist. Not all cases have a protagonist; some cases have only the organization. But a protagonist can force students to examine the situation from a particular person's perspective, thus creating an identification with the organization and the

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urgency for problem solving. The focal decision must have a sense of urgency. A decision like, "What Zoo A's funding strategy should be" is not as urgent as "Facing 50% government sponsorship reduction that takes effect as of 2012, how should Zoo A adjust its funding strategy to guarantee operations?"

6. Does the case include controversy, contrast, conflict, dilemma, or other dramatic elements?

Dramatic elements like a controversial topic, disagreement between stakeholders, a conflict of interest or personality clash between decision makers, are important for a teaching case. Often, even before a case is written, you can already tell whether it will work. A good case gives a "Wow!" feel – you know in advance it will generate heated debate and lead to multiple levels of analysis. Case writing competitions often make "controversy" or "drama" one of the judging criteria. Many prize-winning and best-selling cases are not only educational, but also contain entertaining tension.

7. What are the standard components of a case? How shall I open the case? What sections shall I create thereafter? How shall I close the case?

The standard components of a case are straightforward:

- Opening
- Industry and organization background
- Case story
- Closing

The opening section is the most important part of a case. It usually consists of one to three paragraphs, serving as the stage setting and a "hook" at the same time. In this section, When and Where, Who does What, Why, and hoW (the six Ws) are introduced. You should tell who your protagonist is (name and position), what kind of decision he or she has to make, when and where this takes place (date and location), and why and how this is happening. It is customary to finish the opening with one or two key questions facing the protagonist. A good opening is brief, direct, and has a dramatic effect that can serve as a "hook" to motivate the reader to keep on reading. Do remember to avoid clichés, such as "Mr. Y leaned back in his

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chair pondering the challenges his company was facing."

The sections that follow serve as the framework of the case. It usually has a funnel structure, moving from more general to more specific information. The section headings are not the same as the case components. For example, in the "background" and "case story" part, you can have sections entitled, "The Chemicals Industry," "Dow and Its Acquisition Program," "Dow's Acquisition of Wolff Walsrode," and "The Integration of Wolff Walsrode." The section headings should be short, descriptive, and straightforward to help students follow the story and locate data. Under each main heading, you can have one or several subheadings. But there should not be more than one layer of subheadings, as too many subheadings will make the case structure fragmented.

The closing section gives a short summary of the case to reiterate the decision focus and often introduces a broader new question(s). The question(s) raised in the opening paragraph is immediate, and the question(s) asked at the end is deeper and more general. Although phrased differently from the opening paragraph, the closing paragraph should nevertheless come back to the protagonist's perspective.

8. What data do I need to complete a case? Do I need interviews, and if so, how can I get an organization to cooperate on allowing interviews?

Industry and organization background may seem like the easiest section of a case to write, but it is actually tricky. The common pitfall for new case writers is to include too much information in this part. A teaching case is not the entire history of an organization. The background part should include only the most relevant information for the protagonist to make a decision. Needless information will only muddle the case presentation and bore the student. Figures, tables, and exhibits are always useful to economize the text and give a direct impression of the facts.

The background information mostly can be gathered from published sources either online or offline. But to write an effective case, it is helpful to obtain "insider information." Therefore, interviewing the organization is rather necessary, even when you think you already know the

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organization well.

When you propose interviews to an organization, they will certainly want to know how they will benefit from cooperation. An organization can expect three kinds of benefits, depending on the nature of the case:

- Enhance the brand name – a case, if widely used by educational institutions and businesses, can be a highly effective medium to showcase an organization's best practice, expertise, or innovation.
- Improve organizational learning – an organization can use a case as internal training material to reflect on its effective or ineffective practices and decisions.
- Aid managerial decision making – a case can provide a 360-degree helicopter view of a complex issue, which helps management to make difficult decisions.

The organization will likely also want to know how you are going to use the information you obtain from interviews. It is fair for them to expect that the exclusive information they provide you will not be used against their interest. You can propose signing a confidentiality or non-disclosure agreement (NDA) between the two organizations to guarantee good conduct on your part. Most large corporations have such a standard document; but if your counterpart does not have one, please be sure to establish a written agreement with them, even if it is only an email.

9. Within what time frame do I want to finish the case? What if I experience a writing block?

Writing a case can take as short as a few days and as long as a few months. The most time-consuming part of case development is interviewing. Depending on the cooperation and efficiency of the organization being interviewed, you need to plan one to three months for doing interviews. Transcribing interview recordings and selecting useful data from the transcript also take time. A large portion of the data gathered from the interviews will not be used. To save time, it is always helpful if you already have clear and concrete ideas what to write. When you go through the transcripts, you will see right away the quotes you want; sometimes you will even see the right sentence to open your case!

Try to compose the first draft as soon as possible after the interviews. As time goes on, the

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real story easily fades away. Writing up the draft will take a few days if you do not encounter a block during writing. A writing block has several possible causes:

- Lacking a sharp decision focus;
- Lacking a clear case structure;
- Lacking concrete details from which to build a story;
- Overwhelmed with details and not knowing what to choose;
- Lacking understanding of your students and their level.

The advice here is: Think hard before you write. You can only write clearly if you think clearly.

10. In what style shall I write a case? Are there any writing rules I should know? Any tips for editing the draft?

First and foremost, a case must be written with an objective voice. You – the case writer – should take a neutral stance and make no biased statements. If you have to make any judgments or evaluations, please put them in the mouth of your actors. Watch out when you write a "best practice" case: be sure not to compliment the organization effusively. You should remain objective and let readers draw their own conclusion.

Secondly, a case should include neither analysis nor lessons learned, which can go into the accompanying teaching note. Remember, you want to present your students with an intriguing case to solve, so providing hints or an obvious direction will defeat your purpose.

The language of a case should be clear, direct, and concise. Think of newspaper language, *not* academic paper language. Your readers are most likely students or non-academic professionals, so try to avoid using jargon and technical terms. A case is limited in length and you cannot be wordy or indirect. Try to limit the information in the case to "just enough" – not too much to be overly detailed and not too little to be skimpy – and organize this information in a tight way. To be sufficiently clear, also try to cover only one point per paragraph. A good method to test whether your writing works is to read the case aloud to a family member. If he or she can follow it, then you can safely use it on your audience.

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Lastly, a case may include “distorted” information. To keep a case in focus and within your desired length parameters, simplifications, enhancements, and downplay of some information are commonly used. The ultimate goal of “distortion” is to maximize the teaching value of the case.

There are several conventions in case writing:

- Always write a case in the past tense. The reason to use the past tense is that situations are always changing and a true statement now may be false in a few months. Many new case writers find it awkward to use the past tense, but the technique ensures that the case will remain relatively timeless. The trick is to set a time frame for the case from the very beginning. For example, when you talk about “Company A is the industry leader,” you can rephrase this as “at the end of 2011, Company A was the industry leader.” Also, try to avoid words like “currently” and “presently.” Instead, use concrete time frames like “in May 2012.”
- Use single space.
- Refer to actors by their last names. The first time you introduce an actor, specify his or her full name, and from then on, use only the last name.
- Do not capitalize position titles.
- Number exhibits and refer to them in the text.

When you have drafted both the case and teaching note, it is time to edit the case. Work backward from the teaching objectives and discussion questions, and check whether the case includes adequate information to address them. Is the information sufficient to support a lively discussion with possible variations of solutions? If yes, is it clear enough with no needless details muddying the presentation? Are there any colorful quotes you can use to enhance the case? Is the case easy to read? Are the grammar and spelling correct? Are the exhibits numbered and references cited correctly? Two useful guidebooks on writing well are *The Elements of Style* by Strunk and White, and *On Writing Well: An Informal Guide to Writing Nonfiction* by Zinsser.

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11. What are the differences between a teaching case and a research case?

A research case and a teaching case differ in many ways:

- A research case describes an organization or its decision-making process; a teaching case tells a story with a decision focus.
- A research case explains or analyses organizational decisions; a teaching case offers no obvious explanation or analysis.
- A research case is typically written at the early stage of a research project; a teaching case is typically written after a research project. In fact, many teaching cases are developed from research cases.
- A research case is faithful to "truth" or "the facts"; a teaching case may contain selected, simplified, distorted, or disguised information.
- A research case is mostly written chronologically with little personal touch; a teaching case can be written with flashbacks and should have actors, perspectives, and drama.

12. What are the common pitfalls I should avoid when writing a teaching case?

- The case has no clear decision focus;
- The case has many decision foci;
- The case has no clear structure;
- The case is not objective;
- The case offers a diagnosis of the problem or issue;
- The case provides little context;
- The case provides too many details;
- The case has no actors;
- The case has no dramatic interest;
- The case is too dramatic with complex sub-plots;
- The case is technical or theoretical (jargons and technical terms).

13. How often do I need to update a written case?

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A good teaching case needs to be updated every two to three years – the usual life cycle of a case. You can update the financial data and background information or add an epilogue if the decision focus remains unchanged. If you wish to introduce a new decision focus, you can write a sequel to the previous case.

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How to Write a Good Teaching Note

1. What is the most important thing I need bear in mind when writing a teaching note?

When writing a teaching note, it is *crucial* to remember that you do *not* write this for yourself but for other teachers you do not know in order to help them better understand and utilize your case. Not all of these "strangers" have the knowledge of your case topic or the organization you describe, so you have to guide them step by step through the case; show them all the important details; explain, analyze, and synthesize the information; and demonstrate how to use the information in a class discussion to maximize the learning value of the case. Some details that you think are obvious for their analytical value still need to be highlighted and spelled out. The goal is to make it possible for fellow instructors to adopt your case without any additional research. You do not want them to email or call you repeatedly to ask questions about the case.

2. What is the proper length for a teaching note?

Teaching notes may vary in length: some are 20 pages and others are only two pages. While a good teaching case is short and concise, a good teaching note is detailed and comprehensive. It is very difficult to cover all the points in a two-hour class with a teaching note shorter than five pages.

3. What are the components of a teaching note?

A teaching note has many formats – there is no single case standard, but some components are necessary to structure a good teaching note:

- Synopsis (a brief summary of the case and its conceptual context)
- Teaching objectives (3-5 specific objectives you want to achieve with the case)
- Target audience (the area of study and the level of students for which the the case is suited)
- Case analyses and teaching plan (*please see the next section*)
- References or recommended readings

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- Teaching approach (whether the case can be used for written exams, role-plays, or combined with a video, etc.)
- Data collection (where the data are from and whether they are disguised)
- Assignment questions (for students to prepare before the class)
- Alternative analyses (e.g., an M&A case can be analyzed from strategic, organizational, financial, marketing and branding perspectives, to name a few)
- Feedback (how the case worked with different student groups)
- Epilogue (actual outcome of the case situation)
- Broader lessons (general lessons drawn from the case)

4. How shall I best phrase my teaching objectives?

Teaching objectives provide an overview of how the case fits within a course or the general discipline of a field, and give teachers a guidance of how to use the case.

There are knowledge, skill, and attitudinal teaching objectives. Knowledge objectives refer to analytical tools, framework, or theories of a field. Skill objectives relate to the application of knowledge. Attitudinal objectives compel students to develop a persepctive on their "managerial" or social responsibilities after using the case.

Teaching objectives need not be too many, preferably 3-5 for a full-length case and 1-2 for a mini-case. They should be general enough so that they are important and relevant for the course you are teaching. At the same time, they should also be as specific as possible and measurable so that you can judge if your students have reached these learning goals after the course.

Using precise verbs to formulate your teaching objectives can help make them specific and measurable. For instance, if your objective is for students to *understand* a concept (knowledge objective), you can formulate the objective as "After discussing the case, students will be able to explain … [certain issue]." If your objective is for students to *analyze* a situation with a new tool (skill objective), you can formulate the objective as "After discussing the case, students will be able to demonstrate … [the way to solve a problem]." If your objective is for students to *appreciate* certain decisions (attitudinal objective), you can then say "After discussing the

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case, students will be able to defend … [certain action] with arguments." Below are more examples:

Objective	Action verbs
Remembering	Define, duplicate, list, recall, repeat, reproduce, state
Understanding	Classify, describe, explain, identify, locate, select, translate, paraphrase
Applying	Choose, demonstrate, employ, illustrate, operate, sketch, solve, write
Analyzing	Compare, contrast, criticize, differentiate, examine, experiment, question
Evaluating	Appraise, argue, defend, judge, evaluate
Creating	Assemble, construct, design, develop, formulate, write

5. How can I best develop a teaching plan?

This is the most important part of a teaching note. A common way to organize the teaching plan is to draw a detailed roadmap of discussion questions and ask students to answer these questions by performing in-depth analyses; these analyses can be seen as the "answers" to the questions.

There are four categories of questions:

- Questions to prepare students for the discussion (can be also listed as a separate section, Assignment Questions)
- Questions to open the discussion

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- Questions to advance the discussion
- Questions to close the discussion

Asking the right questions is a science as well as an art. There should be a combination of open-ended and closed questions: use open-ended questions to stimulate discussion and closed questions to check whether students get the facts right. There should also be controversial questions to bring the discussion to a higher level.

Under each question is the corresponding analysis. In the analysis, you can suggest the application of relevant theories, models, and other analytical tools. Please remember always to refer back to the case, using the facts and numbers in the case to support your analysis. If you have included any financial data in the case, you should also explain it and its significance. The analysis should demonstrate at least one possible approach to answering the question. In most situations, there is more than one approach: You need to show the alternatives and indicate their advantages and disadvantages.

It is always advisable to create a timetable for the teaching plan: how much time is needed for each discussion question and how much is needed for the opening, closing, and transitions. If you notice any typical mistakes that students make in analysis during test runs of the case, you should also note them in the teaching plan and suggest how to guide the discussion when such mistakes occur.

6. What is the writing style of a teaching note?

Unlike a teaching case that is written in the past tense, a teaching note is *always written in the present tense*. Apart from this, the writing style for a case can also be applied to a teaching note – clear, direct, and objective.

7. What are the commons pitfalls of writing a teaching note?

The common pitfalls to writing a good teaching note include:

- A skimpy teaching note;
- Too general teaching objectives;
- Too many or too few teaching objectives;

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- Case analysis does not match case content;
- Discussing a theory without a purpose;
- Case analysis is a copy-and-paste from the case;
- Not enough open questions;
- Not enough closed questions;
- Not enough controversial questions;
- No sample analysis or sample answers provided; and
- No analytical tools provided.

8. What else do I need to know in order to write a good teaching note?

Writing a good case takes time, and a good teaching note takes even more time. To perfect a teaching note, you need to teach the case a few times, observe class dynamics, gather student feedback, and revise the teaching note accordingly. Only submit a teaching note for release after the case has been taught, debugged, and refined.

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