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A Guide for Writing Teaching Notes for Decision-Based Cases

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Introduction

This technical note aims to facilitate the writing of teaching notes for decision-based cases.

It targets instructors inexperienced with writing their own cases and teaching notes.

Given the many possible approaches to writing teaching notes, uncertainty is one of the main challenges facing beginner case writers. Several resources discuss the content of teaching notes (e.g., Austin, 1993; Corey, 1998; Mesny, 2014; Yemen, 2010), but few deal with the writing process itself. The goal of this document is therefore to provide beginner case writers with general guidelines for drafting teaching notes. In particular, it allows authors to rapidly evaluate the time needed to prepare the notes, how to begin the writing process, and how to structure the required information.

Structure

This document follows the guide for writing teaching notes proposed by Mesny (2014). It is structured as follows:

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Using a "fill-in-the-box" approach, this document may be used to draft an initial version of the teaching notes by 1) replacing the highlighted text and 2) deleting text boxes offering "tips" at various stages of the writing process.

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Case title

Section 1. Nature of the case, summary, and key topics

This case is based on a real / fictitious company that [Describe the company].

This is a decision-based case. It asks students to play the role of [Describe the "owner(s)" of the problem or the protagonist(s) in the case who are faced with a decision], analyze the situation described, and formulate recommendations regarding [List main decision(s) involved in the case].

The key topics are [List key topics, e.g., internationalization, market selection, and entry mode]. The case takes place in [year + country] and in the [business sector].

The data for this case was collected between / and [beginning and end month/year]. Primary data was collected through [List techniques employed such as in-depth interviews, questionnaires, and observation]. Secondary data was obtained from [List sources such as public websites, industrial reports, and corporate annual reports].The names of the people and companies involved in this case [are real / have been disguised for reasons of confidentiality].

The case [Summarize the case narrative: begins when…, then this happens, and this… and this…, and finally it ends when…].

Section 2. Teaching objectives, target groups, and end-user courses

This case would be useful for business administration students with limited / moderate / extensive knowledge of [List the main topics addressed in the case].

It is recommended for use as [Indicate the type of case, e.g., an introductory case / a functional case / a global case / an exercise / an examination[1]].

It could be used in [List the general type of course the case could be used in, e.g., international marketing and strategic management] courses. Considering the [low, moderate, high] level of

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[1] The term "functional case" refers to a case that deals with a single function or discipline, e.g., marketing, finance, human resources, whereas a "global case" is multidisciplinary in nature. For details on the types of cases and possible uses according to different target audiences, see Vásquez-Dodero (2000).

difficulty of the case, it would be appropriate for students in the first / last semester of a [certificate, BAA, M.Sc., MBA, PhD, graduate, or undergraduate] program.

The primary objectives of this case are as follows:

    A. [Learning objective – e.g., "Understanding the internationalization process of SMEs"]

        1) [Sub-objective – e.g., "Identifying motivations and barriers specific to SMEs when going international"]
        2) Etc.

    B. [Learning objective – e.g., "Determining the best foreign market"]

        1) [Sub-objective – e.g., "Conducting a comparative analysis of countries A, B, C in terms of market potential and barriers]
        2) Etc.

    C. [Learning objective – e.g., "Determining the best entry mode"]
        1) [Sub-objective – e.g., Contrasting entry modes 1, 2, 3 in terms of risk and control requirements]
        2) Etc.

Secondary objectives include the following:

    i. Develop and integrate technical vocabulary in the fields of [list topics]
    ii. Learn about [specific geographic and/or industrial context]
    iii. Distinguish key issues from secondary issues
    iv. Estimate the gap between need for and availability of data
    v. Collaborate, debate, convince, and communicate
    vi. Follow a well-thoughtout decision-making process
    vii. […]

Tip I – Establishing challenging learning objectives

Although there are many useful resources on the topic, Bloom's taxonomy of educational objectives is particularly helpful for establishing learning objectives. For a helpful explanation of this taxonomy, see the Center for Excellence in Learning and Teaching (Iowa State University).

As indicated on the Center's website, "a statement of a learning objective contains a verb (an action) and an object (usually a noun). The verb generally refers to [actions associated with] the intended cognitive process. The object generally describes the knowledge students are expected to acquire or construct." (Anderson and Krathwohl, 2001, pp. 4-5)

lower order thinking skills ⟶				⟶ higher order thinking skills	
remember	**understand**	**apply**	**analyze**	**evaluate**	**create**
recognizing (identifying) recalling (retrieving)	interpreting (clarifying, paraphrasing, representing, translating) exemplifying (illustrating, instantiating) classifying (categorizing, subsuming) summarizing (abstracting, generalizing) inferring (concluding, extrapolating, interpolating, predicting) comparing (contrasting, mapping, matching) explaining (constructing models)	executing (carrying out) implementing (using)	differentiating (discriminating, distinguishing, focusing, selecting) organizing (finding coherence, integrating, outlining, parsing, structuring) attributing (deconstructing)	checking (coordinating, detecting, monitoring, testing) critiquing (judging)	generating (hypothesizing) planning (designing) producing (construct)

Table 1. Establishing learning objectives based on Bloom's taxonomy and the cognitive process – Source: Center for Excellence in Learning and Teaching, adapted from Anderson and Krathwohl (2001, pp. 67-68)

Learning objectives should be based on the type of case. Learning objectives in descriptive cases tend to target lower order thinking skills (columns on the left of Table 1) such as "remembering," "understanding," "applying," and "analyzing," while decision-based cases generally target higher order thinking skills (columns on the right of Table 1) such as "evaluating" and "creating." In decision-based cases, it is possible to target skills such as applying and analyzing, for instance, but these objectives are better treated as secondary objectives. Primary learning objectives should focus on higher order thinking skills.

Section 3. Case teaching strategies

Tip II – Using a PROSITOC or a PROSITOPIC approach

PROSITOC and PROSITOPIC are mnemonic devices for remembering the important steps in discussing and solving a decision-based case. The first approach excludes the "implementation" step and is thus limited to recommending a solution. The second approach includes a description of the conditions for successful implementation of the recommended solution and looks at potential consequences for the company (on all or selected corporate functions). It also studies the impact on its resources (e.g., human, management, technical, and financial), and includes a cost-revenue analysis and a timeline for implementing the proposed solution.

Before you begin writing the teaching notes – or the case (since the information provided in the case should correspond to the approach) – you must decide whether you will include the implementation step. A PROSITOPIC approach is recommended when you have access to extensive data about the company (including financial information) and have a good understanding of "what happened next." The target groups should also be taken into account. You can include the information relevant to the implementation in both the case and the notes, and suggest that the instructor adopt a PROSITOC approach with less experienced students (e.g., BAA and M.Sc. programs) and a PROSITOPIC approach with more experienced students (e.g., MBA program).

The steps proposed here are by no means a model that must be followed, but are examples of steps to consider when thinking about how to structure your discussion and case analysis.

Proposed steps:
1) PRO – Defining the problem
2) SIT – Situation (setting the stage)
3) OP – Options
4) I – Implementation
5) C – Closing

Tip III – Structuring and adapting class discussions

This section provides a general overview of a discussion strategy following the PROSITOPIC approach, i.e., including the implementation phase. It must be adapted to the specifics of the case (for instance, by changing the nature or order of the steps).

Proposed steps:
#1. PRO – Defining the problem
#2. SIT – Situation (setting the stage)
#3-4. OP – Options – polarizing the case & making decisions
#5. I – Implementation
#6. C – Closing the case

Tip III (continued)

Since the nature of and times allocated for classroom activities vary greatly depending on the target audience, different strategies should be proposed for different audiences. The decision-making step in particular should be adapted to the target group. With mature groups, a plenary discussion is recommended. With less experienced groups, the instructor may interrupt the plenary session to break the class into smaller groups and assign specific tasks (e.g., completing data sheets or applying specific analysis models), before resuming the plenary session.

It is generally recommended that "ownership" of the discussion (i.e., who initiates and leads the discussion) be transferred from the instructor (the "choreographer" or the "conductor") to the students as quickly as possible and transferred back to the instructor during the closing step.

The tables below suggest how to structure and adapt the teaching strategy for experienced and inexperienced audiences (e.g., MBA and BAA programs).

The suggested strategy for a [60/90/120/180]-minute discussion is adapted to [target audience, e.g., an M.Sc., MBA class]. The table below presents an overview of the proposed classroom activities, the corresponding objectives, and the recommended time allocations. The steps are then explained.

Step	Classroom activities	Objectives	Time
1. Defining the problem	Plenary discussion – structuring student suggestions on the board	i, iii	10'
2. Setting the stage	Plenary discussion	ii	15'
3. Polarizing the case	Creating tension by asking participants to take a stand, playing a role game or holding a vote	v	5'
4. Making decisions	Plenary discussion – structuring student suggestions and data/calculations on the board	B, C, iv, v	30'
5. Implementing decisions	Plenary discussion – structuring student suggestions and data/calculations on the board	B, C, v	20'
6. Closing the case	Summary of learnings from case	A, B, C, i	10'
		Allocated time:	90'

Table 2. Discussing the case – suggested structure for experienced groups (e.g., MBA) – Source: Aurelia Durand

Step	Classroom activities	Objectives	Time
1. Defining the problem	Plenary discussion – structuring student suggestions on the board	i, iii	20'
2. Setting the stage	Group work – assigning different roles or frameworks / models to apply to the case and to briefly present to the rest of the class	A, ii	35'
3. Polarizing the case	Holding a vote – record on the board # in favour, against, and undecided	v	5'
4. Making decisions	Group work – groups are asked to evaluate various options and formulate a decision	B, iv, v	30'
Break			15'
5. Implementing decisions	Plenary discussion – randomly selected groups are asked to justify their resolution to the rest of the class (10' each) and answer questions about implementation while instructor summarizes important points on the board	B, iv, v	50'
6. Closing the case	Hold a second vote – compare results with first vote		5'
	Lecture on links between case and theory	A, B, i	35'
		Allocated time:	195'

Table 3. Discussing the Case – suggested structure for inexperienced groups (e.g., BAA) – Source: Aurelia Durand

Step #1. <u>Defining the problem</u> – The instructor may begin the discussion by asking students about the key issues in the case and recording answers on the board. Students should differentiate key issues from secondary topics and "symptoms" (which reveal the problem but should not necessarily be addressed). Typical questions to guide the discussion at this stage include the following:

- What is the real problem?
- Where is there room for improvement? Is it critical?
- Why should something be done about this problem?
- Who should be doing something about it? Who "owns" the problem?

Here, the instructor may choose to do an in-depth analysis of the problem or to quickly move on to the next step if students have difficulty identifying the problem and taking ownership of the discussion.

Step #2. <u>Setting the stage</u> – The instructor can help students join the discussion by "setting the stage" for the case and asking them to describe the situation. The "5Cs" model of situation analysis can be helpful here, i.e., ensuring that relevant information about the Company, the Context, the Clients, the Competitors and the major Collaborators (suppliers, distributors, etc.) is included. The following questions may be used to guide the discussion:

- Company: What does the business/company do? What does it stand for (mission, values)? Who runs it? Who makes decisions? Who "owns" the problem? What are the revenue sources? What motivates managers?

- Context: Why is the company facing this situation? In which industry is it active? What do we know about the current situation of the company/industry (life cycle stage, key success factors, value chain, economic context, threats, opportunities, weaknesses, strengths, etc.)?

- Competition: Who are the competitors? What is the company's competitive advantage? How strong is the competition? What are the key success factors in this industry?

- Clients: How is the customer base segmented? Which are the most important segments (e.g., SMEs, MNCs)? Who are the prime and secondary targets?

- Collaborators (stakeholders in general, including employees and external business partners): Who are the major stakeholders? What are their motivations to be in business with the company? Current and potential partners (e.g., local manufacturers, distributors, funding entities, etc.): What value do they add and for whom? Why does the company need them? What are the pros and cons of doing business with them? What is the ideal profile of these business partners?

It is recommended that this step be completed by returning to the definition of problem identified in Step 1, refining it, and identifying important decisions to be made to "solve" this problem. At this stage, the possible solutions or options should become clear. The instructor should encourage students to assume leadership of the discussion.

Step #3. Polarizing the case – If relevant, the relative urgency and importance of the identified decisions/options should be discussed, and students should decide which decision to prioritize. At this stage, the class should be polarized around decisions through a vote, for example. Questions such as the following should elicit "black and white" answers (e.g., yes/no):

- Would you recommend Option 1, 2 or 3? (e.g., "Would you recommend the company expand into country A, B, or C")?

- I am Actor X, and you are Actors Y and Z, and I am telling you that I have decided to [Option 1]. Are you happy?

- Is [Option 2] a bad idea?

- Which of the three options do you think would be best in this situation?

Based on diverging positions, the instructor should lead the students toward further analysis required to make the best decision.

Step #4. Decision-making – For the core of the case discussion, the instructor can directly address the teaching objectives. For instance, with regard to objective A [State the objective, e.g., "Understanding the internationalization process of SMEs"], the instructor could initate and guide the discussion by asking the following questions: [List guiding questions related to objective A.]

- Question #A.1 (e.g., "How do firms usually go international?")

- Question #A.2 (e.g., "Why should the company expand abroad? Why not?")

- …

[Repeat for other objectives]

The instructor could also initiate and guide the discussion by asking questions about the possible options or alternatives. For example:

- How would you justify option 1 (e.g., "expanding into country A")?
- What makes option 2 (e.g., "further penetrating home country markets") a strong/weak strategy?
- Why is it impossible to choose option 3 (e.g., granting a manufacturing license to a foreign partner) in this context?
- …

Step #5. Implementing decisions – This step usually builds upon the decision(s) made during the previous step. Ideally, the students should be "doing the heavy lifting" on their own, but the instructor can help by making remarks or asking questions regarding the following topics:

- short- and long-term impacts of the decision(s) on those involved, on other stakeholders inside or outside the company, on the company's functional activities, on performance indicators, etc.
- the operational implementation of the decisions (challenges to be met; human, technical, and financial resources required; timing/scheduling and budgeting)
- the relevance of a possible contingency plan (i.e., what to do in case something does or does not happen in the wake of the decision), and
- ways to monitor and control the outcomes of the decisions made.

Step #6. Closing the case – The last step of the discussion usually centres on the learnings of the case. Depending on the target group, it may be useful to expressly link the case to theories and concepts at this time. The instructor, who should aim for eloquence, must now assume full ownership of the discussion (taking no more questions or comments) and provide a clear explanation of what the case best illustrates.

Tip IV – Suggesting a board structure

Some instructors find that writing on the board slows down class discussions and avoid doing so. Others believe it is important to keep track of discussions by listing key words on the board when they are mentioned. This can be extremely useful not only to instructors when it comes time to close the case but also to students whose learning style is more visual than auditory. One of the many resources dealing with learning styles can be found at BEPKO Learning Center (Indiana University-Purdue University Indianapolis).

Keeping track of important points emerging from the discussion can be beneficial, but it can also be challenging. Instructors run the risk of ending up with a confusing board that is difficult to decipher, of running out of room, and of having difficulty distinguishing important from unimportant points.

Tip IV (continued) – It can be helpful for instructors to plan where to record information on the board during each step of the discussion. Your teaching notes should thus include a suggested board structure adapted to the specifics of the case.

The figures below illustrate suggested board structures for PROSITOC and PROSITOPIC approaches.

The order and size of textboxes can be adapted to each case. In western culture, information generally flows from left to right, but to help focus student attention, the core of the discussion may be placed at the centre of the board. Since steps #3 and #6 (polarizing and closing the case) are usually carried out by the instructor, they do not appear on these boards. It is also useful to reserve space for calculations and "out of focus" comments. These are comments (questions, points) mentioned by students that instructors may wish to record but that do not necessarily merit immediate attention (e.g., low relevance, not raised at the appropriate time, etc.). When closing the case, this type of information becomes easily accessible and can be erased if need be, as it is limited to one area on the board.
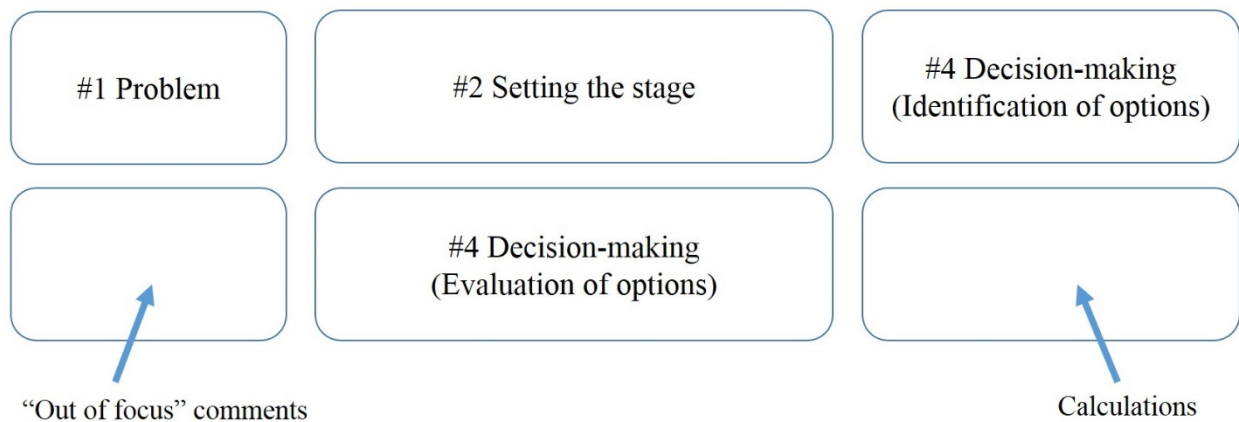
#1 Problem	#2 Setting the stage	#4 Decision-making (Identification of options)
	#4 Decision-making (Evaluation of options)	
"Out of focus" comments		Calculations

Figure 1. Example of a board structure (PROSITOC approach)

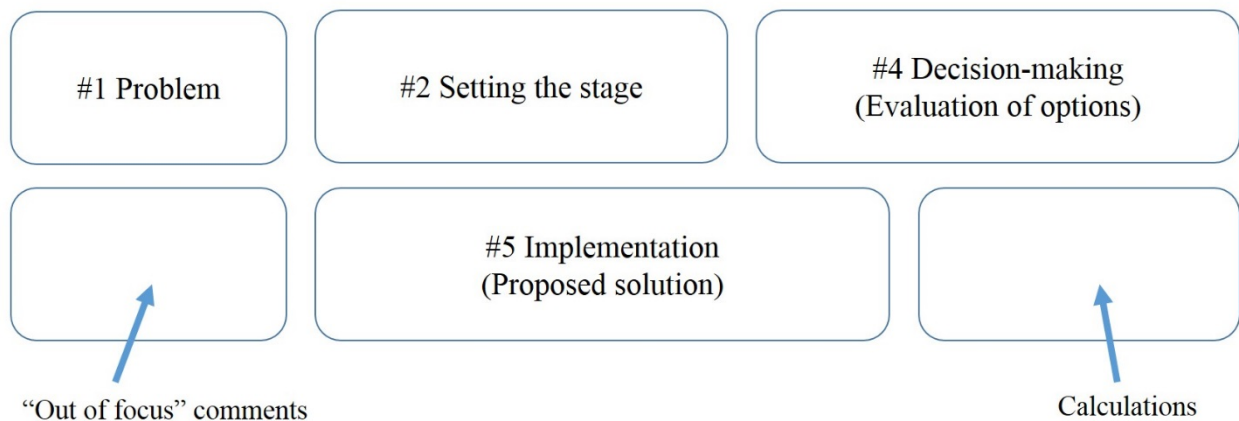| #1 Problem	#2 Setting the stage	#4 Decision-making (Evaluation of options)
	#5 Implementation (Proposed solution)	
"Out of focus" comments		Calculations

Figure 2. Example of a board structure (PROSITOPIC approach)

Section 4. Case analysis

Tip V – "Solving" the case

Suggested steps for a PROSITOC approach:

#1. PRO – Problem: Identifying the problem is one of the biggest challenges in case analysis; after specifying the decision to be made, i.e., the problem to be solved (based on the situation and the stakeholders' vision and goals), formulate objectives (e.g., increase sales, revenues, profits, market share, etc.) that can later be used to evaluate the success or failure of the proposed solution.

#2. SIT – Situation (setting the stage): Make sure the situation is fully understood.

#3. O – Options: Identify alternative solutions or options (standalone options or scenarios combining various options) that could solve the problem; evaluate their respective suitability based on the situation, the problem to be solved, and the objectives to be reached.

#4. C – Closing: Assess the suitability of the various options and recommend a solution (which may be one specific option, the two best ones, a sequence of options, etc.). Discuss the conditions for successful implementation and the hoped-for consequences for the company.

Step #1. Defining the problem – In this case, the main problem is [Explain the main problem]. Other secondary issues include [List other problems and indicate their type or category – see Tip below]. In this situation, decision-makers should pursue the following objectives: [Define objectives to pursue (e.g., increase sales, revenues, profits, market share, etc.)].

Tip VI – Presenting the case problem

A generic objective when using the case method is helping students distinguish between key and secondary issues. Students – particularly those with little professional experience – often have trouble differentiating between causes, problems, and consequences. A table that illustrates the differences between key issues and secondary problems can be helpful – see table below.

Case issues	**Issue category**
- Issue #1	- Key issue
- Issue #2	- Secondary or peripheral problem
- Issue #3	- Symptom of the problem
- Issue #4	- Consequence of the problem
- Issue #5	- Cause of the problem
…	

**Table 4. Presenting the case problem: distinguishing between key and secondary issues
– Source: Aurelia Durand**

Step #2. Setting the stage – The instructor might want to consider the following points when analyzing the situation described in the case. First,… Second,… Finally,… [Supply possible anwers to questions listed in the teaching strategy section.]

Tip VII – Setting the stage

The background information and possible answers to the questions addressed in the case should be presented concisely (e.g., using bullet points) and in tables included in the appendices to the teaching notes.

The following table provides an example of how to structure and link the information to the guiding questions to help instructors set the stage.

	Guiding questions	**Information summary**
Company	What does the business/company do? What is its mission? Who runs it? Who makes the decisions? Who "owns" the problem? What are the revenue sources? What motivates managers?	Decision-makers Mission, vision, and values of company Historical overview Location Size and revenues Strengths and weaknesses Internal value chain Etc.
Context	Why is the company facing this situation? In which industry is it active? What do we know about the current situation of the company/industry (e.g., life cycle stage, key success factors, value chain, economic context, threats, opportunities,weaknesses, strengths)?	Industry Stage in the industry life cycle External value chain Recent trends Opportunities and threats Etc.
Competitors & Competition	Who are the competitors? What is the company's competitive advantage? How strong is the competition? What are the key success factors in this industry?	Direct and indirect competitors Degree of competitive rivalry Key success factors in the industry Competitive advantage of company Etc.
Clients & Demand	How is the customer base segmented? Which are the most important segments (e.g., SMEs, MNCs)? Who are the prime and secondary targets?	Current and potential clients Segments, targets, and positioning Market size, qualification and quantification of demand Power of customers Etc.
Collaborators	Who are the important stakeholders? What are their motivations for doing business with the company? Current and potential partners (e.g., local manufacturers, distributors, funding entities): What value do they add and for whom? Why does the company need them? What are the pros and cons of doing business with them? What is the ideal profile of these business partners?	Employees Suppliers (and bargaining power of suppliers) Distributors Financial institutions Research institutions Governmental agencies Etc.

Table 5. Setting the stage: example of a situation analysis – Source: Aurelia Durand

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Step #3. Identify and evaluate options

This case has X possible solutions, scenarios, or options: [List and briefly describe the various options for addressing the main problem in the case.]

- Option #1
- Option #2
- Option #3
- …

Tip VIII – Evaluating the options

In your case analysis, it is a good idea to limit the number of options considered (no more than 3 or 4). You may wish to briefly mention other options that may be considered but that present obvious/serious shortcomings, explaining why they have been excluded from your analysis.

Then explain the pros and cons of each option in terms of the specific situation (e.g., mission, vision, and values of the company, goals and objectives of managers, available resources, expected revenues, time frame.)

It is also helpful to list the decisive factors in the decision-making process and to discuss their relative importance.

Finally, provide your own views about how to evaluate the options. Propose a solution and explain why you think it is the best one.

The pros and cons of each option are listed below to clarify the key factors in the decision-making process. [List the pros and cons for each option, using the table below if desired.]

	Option 1	Option 2	Option 3
Advantages/benefits	• Advantage/ benefit #1 • Advantage #2 • …	• • •	• • •
Disadvantages/risks	• • •	• • •	• • •

**Table 6. Preparing to evaluate the options: listing their pros and cons –
Source: Aurelia Durand**

Based on the preceding analysis, the most important factors on which to base decisions aimed at solving the case are as follows: [List the factors in decreasing order of importance and explain their relative importance to the overall decision.]

- Factor #1: is extremely important because…
- Factor #2: is important as well, but less so because…
- …

- Factor #X: must be considered but is of marginal importance.

Based on this set of key factors, the best option appears to be [option X] because… [Explain how your in-depth analysis led you to this conclusion. If applicable, support your analysis with a decision matrix – see below].

Tip IX – Building a decision matrix

A decision matrix is an analytical tool that can help you evaluate and compare options. It is used to quantify the desirability of various options (even if based only on subjective opinions and rough estimates) so as to facilitate their comparison. It takes work to construct, but its biggest advantage is that it makes it possible to quickly see which option offers the best solution to the case and under what conditions. The other advantage of a decision matrix is that it enables the instructor to discuss the choice of key decision factors, their relative importance (weight) in the decision to be made, the relevant evaluation criteria, and to explain how to subjectively evaluate the suitability of each option based on the available data. Including a decision matrix in your teaching notes can thus bolster the confidence of instructors using your case.

Steps:

- List the options in the columns of the matrix
- **Establish relevant evaluation criteria (lines of the matrix)**: for this, select a reduced set of key factors in the decision-making process and choose the relevant indicators to quantify or qualify those key decision factors
- **Assess the relative importance of evaluation criteria** by giving them a specific weight in the decision to be made
- **Document the comparison of options by building a dataset** of relevant information
- **Select an evaluation scale** to assess each option's suitability
- **Evaluate the suitability of each option by giving it a score** for each criterion; add up the weighted scores to get the total score for each option.

Documenting the comparison of options – This entails collecting credible data for each evaluation criterion and each option and presenting it in a well-structured and well-referenced table to facilitate information retrieval. An example of such a table is provided below (built according to the PEST framework, which is one of many possible ways to structure country data). It may sometimes be necessary to use proxies to get as close as possible to the needed information. In other instances, the information may be only partially available (i.e., for some but not all options, such as options 1 and 2 but not 3, or for different periods of time, such as in 2014 for options 1 and 2, but in 2010 for option 3). If there is no data at all, you can insert "N/A" (not available) in the table. A list of references should be provided along with the table, indicating the name(s) of the author(s) (e.g., individuals, organizations, or institutions), the year, the title of the publication, and the URL if the article was accessed via a webpage. It is vital to be as explicit as possible in presenting the data. Don't forget to indicate the type of data: is it a percentage, a ratio, a ranking, a value in a specific currency, or a volume in a specific metric? The instructor should easily understand the matrix and be able to find the source of all information if necessary.

	Option (Country) 1	Option (Country) 2	Option (Country) 3
FACTOR 1 (e.g., POLITICAL & LEGAL ASPECTS)			
Indicator 1 – e.g., Country risk ranking / 180 countries (author, year)	23	74	2
FACTOR 2 (e.g., ECONOMIC ASPECTS)			
Indicator 2 – e.g., Gross domestic product, Billion USD (author, year)	552	150	2,800
Indicator 3 – e.g., Economic growth rate, % (author, year)	6	8	2
FACTOR 3 (e.g., SOCIO-ECONOMIC ASPECTS)			
Indicator 4 – Human development index Ranking / 187 countries (United Nations, year)	50	119	5
Indicator 5 – Literacy rate, adult total (% of people aged 15 and above) (author, year)	96	76	100
FACTOR 4 (e.g., TECHNOLOGICAL ASPECTS)			
Indicator 6 – e.g., R&D expenditures (% of GDP) (author, year)	2	1	9

Table 7. Preparing to assess the options: documenting the comparison with a dataset – Source: Aurelia Durand

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Tip IX (continued)

Assessing the relative importance of evaluation criteria – You should assign a weight to each criterion. For instance, imagine you have 100 points to distribute among all of the evaluation criteria: those points can be expressed as percentages. Keep it simple since this is just a rough estimate of the relative importance of the factors. There's no point trying to be too precise (e.g., not 12% or 28%, but 10% or 30%, using increments of 10, or perhaps 5). No criterion should be weighted less than 10% since that would indicate that the factor is probably not key to the decision-making process.

Choosing an evaluation scale – The options should be compared based on their degree of "suitability" or advantageousness. The scale used will depend on the degree of precision needed to differentiate between the options (e.g., from 1 to 3, 1 to 5, 1 to 7, 1 to 10, or even 1 to 100). Scales with a mid-point are often used (e.g., 3 is the mid-point on a scale from 1 to 5, 4 is the mid-point on a scale from 1 to 7) because they can be used as Likert-type scales where scores below the mid-point indicate that the option is "unsuitable," scores above the mid-point indicate that the option is "suitable," and the mid-point represents a "neither suitable nor unsuitable" position. This can be particularly useful in cases where data is incomplete, making it impossible to state whether an option is suitable or not: you can still give it a "neutral" evaluation with a score at the mid-point. When you add up the scores, the option is not "penalized" for its partial lack of information. Other evaluation scales use "stars" (e.g., from * to ***) or plus and minus signs (e.g., from --- to +++). The advantage of a numeric evaluation is that it makes it easy to add up and compare scores.

Tip IX (continued)

Evaluating the suitability of each option – Once the scale has been chosen, an "evaluation score" (i.e., a specific rating) can be attributed to each criterion for each option based on the information compiled in the dataset. In the table below, the bottom line presents an overall evaluation of the options compared. It is this bottom line that allows you to justify your recommendation.

Note that the overall evaluation indicates just how significantly the options differ in terms of suitability. In this case, there seems to be a clear "winner" (option 1). Option 2 is more suitable than option 3, but by a smaller margin. What does this difference mean? Is it really significant? Should you conclude that option 3 is not worth considering or that it is only slightly less suitable than option 2? There are no clear answers, but it is worth asking such questions. Options with similar scores can sometimes be considered equally suitable. This means that you need to be careful about the conclusions you draw when using tools such as a decision matrix. The answers are not black and white, just interpretations.

Based on this evaluation, recommend a solution (which may be one specific option, the two best ones, a sequence of options, etc.).

		Option 1	Option 2	Option 3
DECISION FACTOR #1 – 30%				
Indicator #1 – 10% (source, year)		3	1	2
Indicator #2 – 20% (source, year)		2	3	1
	Weighted total	**0.7**	**0.7**	**0.4**
DECISION FACTOR #2 – 60%				
Indicator #3 – 10% (source, year)		3	2	1
Indicator #4 – 30% (source, year)		3	2	1
Indicator #5 – 20% (source, year)		2	1	3
	Weighted total	**1.6**	**1**	**1**
DECISION FACTOR #3 – 10%				
Indicator #5 – 5% (source, year)		1	3	2
Indicator #5 – 5% (source, year)		1	2	3
	Weighted total	**0.1**	**0.25**	**0.25**
	OVERALL EVALUATION	**2.4**	**1.95**	**1.65**

Legend for evaluation: 1 = Least suitable option; 3 = Most suitable option.

Table 8. Assessing options: the decision matrix – Source: Aurelia Durand

Step #4. Closing

Tip X – Closing the case analysis

To close the case analysis, summarize the subject of the case, the problem to solve (i.e., decision to be made), and the proposed solution. Then, highlight the conflict between the various options (i.e., on which students have polarized opinions). It is also interesting to review the conditions (i.e., the key decision factors and their relative importance) under which the proposed solution is most robust. Reviewing these conditions should remind students that changes to (e.g., key decision factors or their relative importance, different events, etc.) would certainly increase the suitability of other options. Finally, the important lessons and points illustrated by this case should be noted, along with theories and/or models that may be applied to the case analysis. An example of a summary table is provided below.

This decision-based case takes place in [year + country + business sector]. The key topics are [List key topics here]. Students are invited to play the role of [Describe the "owner(s)" of the problem or the protagonist(s) in the case who must make decisions], analyze the situation described, and formulate recommendations regarding [List key problems and main decisions involved in the case]. In the case situation, [X solutions/options] may be adopted or considered and the case may be polarized around the divergent opinions related to [Explain sources of divergence or uncertainty].

Considering [List key decision factors and give a sense of their relative importance], one of the most robust solutions to this case would be to [recommended option]. Under different conditions, such as [List possible changes or uncertainties], other potentially suitable alternatives would be to [Explain other options].

The important "learnings" of the case are [List lessons, points raised in the case analysis, and what the case illustrates best].

Finally, the main theories and concepts that [can be applied to /are corroborated by /contrast with] this case are listed below.

Topics /Learning objectives	Questions for students	Concepts & theories /References
A. Internationalization process	• How do firms usually go international?	• The Uppsala internationalization process model • Johanson, Jan and Jan-erik Vahlne (1977, 2009)
• A.1. Identifying motivations and barriers specific to SMEs going international	• Why should the company expand abroad? Why not?	• Buckley (1993); Etemad (2004)
B. Market selection		
• B.1. Choosing the best foreign market	• How would you justify expanding into Country A?	• CAGE distance analysis • Ghemawat (2001)

Topics /Learning objectives	Questions for students	Concepts & theories /References
C. Entry mode selection • C1. Choosing the best entry mode	• Why would it be unwise to choose entry mode 3, e.g., granting a manufacturing license to a foreign partner, in this context?	• Eclectic theory and transaction costs theory • Dunning (1980); Williamson (1979)

Table 9. Closing the case analysis: establishing links with concepts and theories – Source: Aurelia Durand

Section 5. Links to other cases and preliminary use in the classroom

This case [is/is not] directly linked to other cases. The [problem/situation/range of options] [is similar to/complements/contrasts with] what is described in the following case(s): [case name(s) and full reference(s)]. Simultaneous use of these cases in a course on [type of course] would fully illustrate [topics] in various contexts.

This case [has been/has not yet been] tested in the classroom. [If tested, provide a summary of the observations made. E.g., "Students struggled to… They then identified X easily and moved on quickly to Y… When the case was polarized, X students voted for option 1 and X students for option 2, etc." Overall, give instructors a general sense of what did or did not work].

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