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Guide to Writing Teaching Notes – May 2011

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As a "public" document intended for the management teaching community (particularly at the university level), the teaching notes that accompany a case study serve three complementary objectives:

- To allow instructors who are considering using a case **to quickly decide whether it is suitable for their own teaching objectives** and for their specific teaching or training context;
- To document, in a detailed manner, **the case teaching strategy and concrete ways in which the case can be used in the classroom** as recommended by the case authors;
- To explain the **authors' analysis of the case**, by offering their own "reading" or interpretation of the case.

Teaching notes that meet these three objectives facilitate reflection and the sharing of knowledge and practices between instructors at two levels:

- Teaching knowledge/practices, particularly with regard to the different ways of using cases in class and of promoting use of the case method in the management field;
- Management knowledge/practices, including management's subfields (leadership, innovation, human resources management, ethics, strategy, IT management, etc.).

One of the advantages of a "good case" is that its teaching potential usually extends beyond the authors' intended and stated uses of the case. As such, the aim of teaching notes is not to document every possible way in which a case can be used (an impossible task in itself), but rather to explain the teaching strategies adopted by the authors of the case along with their own interpretation or reading of the case. Based on this "foundation," instructors can then invent their own uses and formulate their own analysis with full academic freedom.

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Mandatory sections in teaching notes

In order to meet the three main objectives mentioned above, teaching notes should contain the four sections described below. **The number of pages is intended as a guideline only.** A teaching note that is 6 pages long can be just as good as one that is 25 pages long. Under 6 pages, there is a good chance that one or more of the four mandatory sections will be missing or inadequately covered. On the other hand, in cases over 25 pages in length, the authors are likely either bogged down in unnecessary theoretical issues or in details that are of little use to instructors who may wish to use the case, or, even worse, they are providing information on the situations described in the case that should probably be included in the case itself.

1. Nature of the case, summary, main themes — 1 to 2 pages

- Specify whether it is a **real or fictional case**. If it is an actual case, indicate whether it has been "**disguised**" for reasons of confidentiality and, if so, indicate the extent to which it has been disguised (have only the names been changed, or has other information such as the organization's activities or sector been modified as well?).
- Specify whether it is a **"decision-making" case** (a case that exposes a problem, a challenge or an issue on which students will be asked to make a decision by placing themselves in the role of a given character) or an **"analytical" case** (a case that describes a certain number of events or episodes, without there necessarily being an obvious "problem" or a decision to be made).
- Specify the **sources of information, the methods of data collection** (public or private documents, interviews, observation, etc.) and the approximate dates on which the data were collected.
- **Summary** of the case: Provide a brief synopsis of the case (200 words maximum) that provides a clear indication of the main themes and the "tone" of the case.

2. Teaching objectives, target group and end-user courses — 1 to 2 pages

- Specify the main teaching objectives targeted by the case and, where applicable, any secondary or special objectives.
- Specify the type of course for which the case is intended: introductory courses or advanced courses, course theme, type of programs targeted.
- Target group: students with or without experience in management, level of training, generic profile.

> ***It is important to present the intended end-user courses/programs in a general manner that can be clearly understood by any instructor, regardless of the education system in which they teach (for example, there is no need to provide course acronyms or numbers used at specific institutions).***

3. Case teaching strategies 2 to 5 pages

Cases as they are understood here are **always intended to be discussed in a classroom setting.** The extent to which this discussion is controlled by the instructor can vary; the discussion can be preceded by a theoretical lecture; it can be based on preparatory questions given to students in advance; it can take various forms, including work in small groups, role playing, group discussions, votes, student presentations, theoretical capsules presented by the instructor, etc. There are many approaches to using cases in the classroom. The aim of this section is to provide details of the teaching approach and strategies recommended by the authors of the case in question. **This teaching strategy must be directly related to the teaching objectives presented in section 2.**

This section can include the following elements:

- Organization of the class session (or sessions, if the case is to be discussed over more than one class session), nature and sequence of the different steps in the discussion (full group, discussion in small groups, role playing, etc.).
- Approximate duration of each step.
- Preparatory work required of students (readings, preparatory questions, etc.).
- Questions to open, advance or conclude the discussion.
- Didactic elements used: tips for using the board, multimedia tools, etc.
- Other potential discussion scenarios.

> ***The aim of this section is not to explain every possible way in which the case can be used in class. Rather, in keeping with the stated teaching objectives, it should give a concrete outline of how the case authors use it, while at the same time offering "their" version of the "case method."***

4. Case analysis 2 to 5 pages

This section deals with the analysis itself of the case – that is, the main elements that the case can be used to discuss as they pertain to management. This is where the authors offer their own "reading" or interpretation of the case as well as their "answers" or clues to answers to the main questions put to students (section 3). This section can also be approached from the perspective of: "This is the type of analysis or reflection that I would like students to have in relation to this case."

This analysis often brings to the fore notions, concepts or theories that should be identified and named. However, the goal here is <u>not</u> to engage in a long theoretical explanation of these notions. Rather, once the theoretical elements have been identified (with possible mention of specific references that can be consulted on these notions), the analysis should remain focused on the case itself, with direct reference to the specific elements of the case used in the analysis.

> ***One of the advantages for the authors of providing their own analysis is that it allows them to make sure that all the elements necessary for this analysis are indeed present in the case (sometimes, in preparing this section, the authors decide to add pertinent information to the case or to transfer to the case information they originally intended to include in the notes).***

A case is generally more than a simple "illustration" of a theory. The "answers" or, in the case of a decision-making case, the "solution" to a case are always open to discussion. The goal of the analysis section is thus precisely to identify any controversial elements, the different ways of addressing the issues raised by the case, any new questions arising from the introduction of a particular theory, etc.

The goal is not to provide an exhaustive account of all the different possible interpretations of, or perspectives on, the case being considered. Nor is the aim to limit the use of the case to the sole analysis offered by its authors. On the contrary, instructors who decide to use the case are free to interpret the case as they see fit, even if their interpretation is different from that of the authors. As for the authors, their job is to explain their analysis in such a way as to, on the one hand, demonstrate how their case meets the stated teaching objectives of the case (section 2) and, on the other hand, share their knowledge and expertise with other management instructors.

Optional Sections

Depending on the case and the context, authors may want to include additional sections in their teaching notes, examples of which are given below:

5. References

A list of the main references related to the theories, concepts, principles or authors mentioned in the analysis in section 4.

Additional references as necessary.

6. Links with other cases or teaching materials and documents

If the authors perceive strong links between their case and others, it may be useful to identify these other cases and briefly explain how their case contributes to the issues raised by them. The same goes for any pertinent videos or other material that could accompany the case.

7. Report on preliminary use in the classroom

If the case has already been tested in the classroom (<u>this is strongly recommended before submitting a case and its teaching notes for publication</u>), it is useful to provide a brief report on the experience, particularly on how students reacted to the case, on any difficulties encountered, on what worked well in terms of providing learning opportunities, etc.

8. "What really happened"

When it comes to certain real-life cases (whether disguised or not), it can be useful to know "what really happened" to the people or companies depicted in the case. The fact of providing this information does not in any way mean that it must be shared with the student. This is a decision that the instructor must make based on the targeted teaching objectives.

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