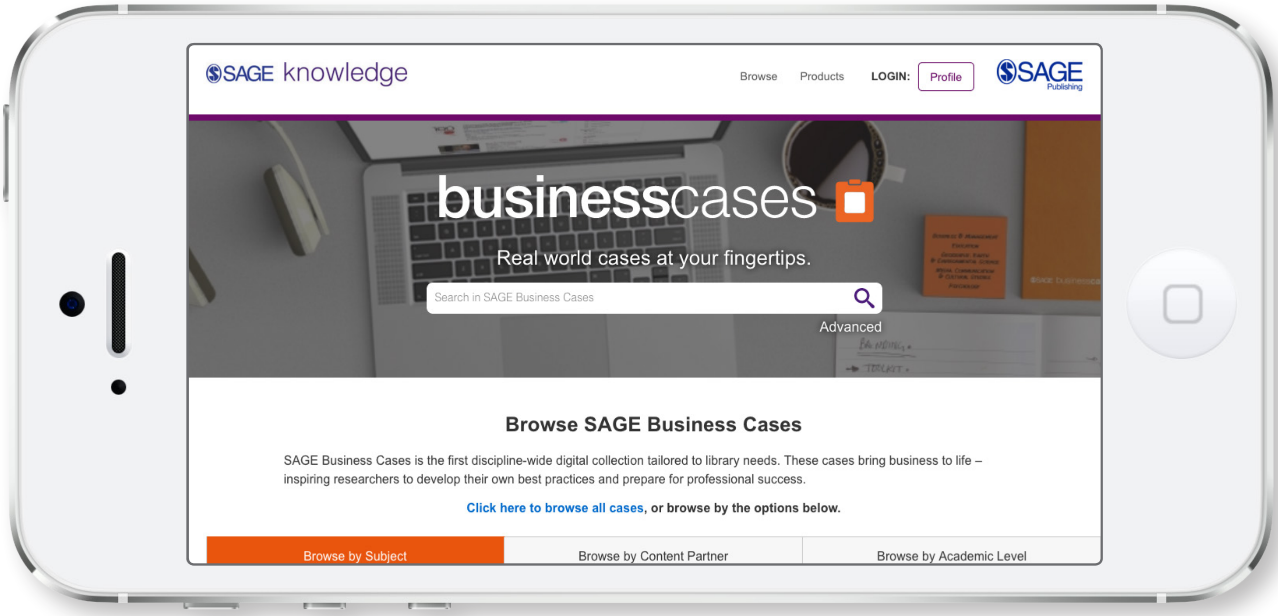

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Guide for Contributors: Tips for Writing Cases

By Noah Barsky, PhD, Villanova University

Well-written and effective business cases are designed with the needs of both faculty and students in mind. Faculty members are critical as they will select the case, find a fitting place in a course, prepare its delivery, and ultimately guide and assess student learning. Students, the ultimate consumer of the case, often have no say in the selection of the case, but are asked to invest their educational time and energies in utilizing the case. To design and write a case that will meet the needs of both audiences, authors should consider the following tips:

Textbook examples certify learning. Cases educate.

Textbook learning is often a re-packaging of objective facts or approaches set forth in a preceding chapter. A great case can call upon resources of many types across numerous disciplines. Great cases are not about what facts students can recite, but rather what students and faculty can do with the fact pattern. The subject matter of a case should be real or, at very least, realistic. Popular cases can be realistic situations, adapted circumstances, or a lesson from a publicly known business example.

Have a purpose

A clearly defined abstract is critical to maximizing the number of faculty who will consider the case and ultimately adopt it. The abstract should be clear, concise, compelling, and credible. Write it first to organize your thoughts. Re-write it last to ensure that it reflects the case. The abstract should briefly overview the case and why its subject matter is important and relevant. Provide an overview of what the students will do and what they will learn. Most importantly, make it appealing; you are asking a faculty member to continue reading and eventually invest scarce class preparation and delivery time in your idea.

> ‘The subject matter of a case should be real or, at very least, realistic’

Craft meaningful objectives

Document 5-7 meaningful outcomes that students will take away from the case. Start each learning objective with a unique and actionable verb (e.g., analyze, evaluate, determine). The learning objectives are important as they will frame the context around which students will learn and further specify why the topic is important. After all, motivated and curious learners are more apt to fully explore a topic and analyze the case.

First, introduce the topic or scenario with background information, but craft each sentence deliberately and wisely. This information should be limited to those facts that are relevant later. Next, the case should build intrigue, highlighting a business decision or issue that may not have a clear-cut or agreed-upon answer. Ultimately, the "crescendo" of the case accomplishes two objectives: it raises a topic that merits debate and represents a useful example for future reference in students' studies and professional careers.

> Lifelong learning depends on the ability to think, and to do so with great critical ability and healthy skepticism

Close with clearly defined discussion questions and references

Lifelong learning depends on the ability to think, and to do so with great critical ability and healthy skepticism. The discussion questions should require that students deliberate case facts, apply detail in supporting tables, or access databases, articles, or websites that further enrich the conversation. High quality discussion questions will stimulate meaningful classroom conversation and hopefully challenge students to push the bounds of their thinking and understanding. Conversely, discussion questions that result in simple objective outcomes (e.g., calculations, lists, facts) lack discussion and often do little to justify the time investment required for a case over a traditional textbook homework problem. Even worse, such materials reduce the professor's role to one of certifier, rather than educator.

Invest considerable time in the teaching notes

Faculty would widely agree that the perceived quality of a case depends directly on the nature of the teaching notes. The teaching note is the author(s)' guidance on how to deliver the case effectively. Often, writers expend their energy on the case itself and reserve little for the teaching notes.

Exceptional teaching notes include an **overview** that is richer than the abstract. It should serve as an executive summary of the case and reinforce key learning objectives. If a faculty member only reads this overview, he or she should be able to grasp the concepts of the case and envision how it might fit into their curriculum.

Following the overview, state the **teaching objectives**, which should incorporate the student learning objectives without mimicking them exactly. Next, define the target audience. Indicate which academic level would best understand and benefit from the case (e.g., early undergraduate, MBA, specialized Master's programs), and suggest types of courses or subject matter that the case would complement. When determining a target audience, carefully consider the base knowledge and any prerequisite coursework that is needed to fully comprehend and appreciate the case.

The **teaching strategy** is the author's opportunity to advise faculty on how to present the case to students and structure the assignment. Suggest if you think the case should be introduced in one class and discussed in another, or if it can be covered in one session. Is it well suited to individual reflection or a group effort? Emphasize any supplementary articles or videos that may help students with the assignment, especially those that contain additional background information on the subject or industry.

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Finally, compile **solutions** for the discussion questions. This section will help prepare faculty to guide class discussions by illustrating some of the conclusions that students should or could derive from the case. Solutions are not meant to be comprehensive but should adequately prepare faculty for student responses and offer enough insight and knowledge to ask follow-up questions and facilitate discussion. If the case requires students to conduct any quantitative analysis, be sure to include those calculations and an explanation of their significance to the case, along with any possible variations that may be relevant.

Consider the tips above and your case can meet its purpose – to enable a classroom learning experience that enriches the thinking and perspectives of students and faculty!

Noah P. Barsky, PhD is currently a professor at the Villanova University School of Business. He has also taught as a visiting professor in the Executive MBA program at Washington University in St. Louis and the INSEAD MBA program in Europe. His research and teaching focus on performance measurement, business planning, risk assessment, and contemporary financial reporting issues. Dr. Barsky is a member of the Sage Business and Management Advisory Board.