Delivery guide: SAGE Business Cases training presentation

Our Trainers have put together this training delivery guide to accompany the SAGE Business Cases training presentation. If you plan on delivering the training presentation to educate users about the SAGE Business Cases platform, this document will help you prepare and deliver the session. The following pages contain a slide-by-slide representation of the presentation, with tips, suggestions and guidance from the SAGE Training team. We hope that this guide makes it simple and painless to deliver training to your users!

If you want to learn more about this database, explore more of our training resources, or get in touch with the SAGE Training team who will be happy to help you!

Getting started…

1. This guide and the accompanying presentation are available through the SAGE training pages, and have been designed to provide guidance and inspiration so that you feel comfortable and confident to deliver your own sessions on our products. Any of these resources can be modified to best meet the needs of users at your institution, so please feel free to amend the presentation in any way before you begin.

2. SAGE Business Cases is comprised of different collections of content, and your institution may not have access to all content available. It is worth checking with the library what level of access you have before starting any training or information sessions.

3. Before you deliver this presentation to others, you might like to refresh your own knowledge of the platform using our An introduction to SAGE Business Cases presentation.

4. If you would like to add a more interactive component to your presentation, we have prepared some simple yet effective training activities, that you can use to get participants exploring the platform first-hand. If you decide to use one of these activities, we recommend setting this at the end of the full presentation, to help participants consolidate what they have learnt during your presentation and apply their learning in a hands-on way.

Setting up…

1. The training session works most effectively if delivered in a teaching or training room with a presentation screen, with each participant having access to their own computer or laptop; this allows participants to get hands-on with the platform and apply their learning under the guidance of the instructor.

2. Before promoting your session to potential participants, it is worth spending some time thinking about what you would like participants to have learnt, understood or achieved by the end of the session. Being clear on these aims will help guide the development of your session, i.e. how long the session needs to be, and how much detail you want to include in the session.

3. Prior to delivering your session, you should find out how many participants will be attending, and who they are, i.e. undergraduate students, researchers, faculty, or library staff, as each of these groups might have different motivations for attending.

General training tips…

1. Aim to arrive in good time to the teaching or training room to set up your presentation screen, check the internet connection, and open the appropriate pages on the SAGE Business Cases platform so that you are able to demonstrate the content, tools and functionality to the session participants.

2. Give participants plenty of opportunity to ask questions and clarify information. The presentation is broken down into logical sections with heading slides, which provide nice, natural pauses where the presenter can open the floor for questions.

If you are in Europe, the Middle East, Africa, Asia, or Oceania, you can explore more of our training resources here.
If you are in North America, Latin America, or the Caribbean, you can explore more of our training resources here.
Beginning your session

Title slide
Add in your workshop title, who it is for, your name and contact details.

SAGE Business Cases
Workshop for {...}
{Your name}

Session outline

- Introduction to SAGE Business Cases
- Live platform demonstration
- Final questions and session round-up

Session objectives

By the end of this session, participants will be able to:
- Describe how SAGE Business Cases can help them in their study and research
- Locate relevant cases using browse and search options
- Save a case to a list within the platform

Session objectives
Objectives are a great way of helping participants engage with a session, as they can see what they should be able to do by the end of the session. These are the session objectives created specifically for this ready-made presentation. If you change anything within the presentation, you should double-check to ensure that the session will still deliver the objectives; if not, then you can amend the objectives on this slide.
Discussion Questions

- How familiar are you with SAGE Business Cases?
- What projects are you currently working on or interested in?
- What do you hope to gain from today’s session?

Ask participants to discuss their answers to these questions in pairs or small groups. Allow 5 minutes or so for feedback, depending on the size of the group.
Introduction to the platform

*Overview slide*
This slide provides a basic and concise introduction to *SAGE Business Cases*. The URL of the platform is also shown at the bottom of the slide for easy reference.

*SAGE Business Cases* gives you access to a collection of over 3,000 proprietary, licensed, and commissioned cases that inspire researchers to develop their own best practices and prepare for professional success. These business cases, tailored to library needs, provide librarians, faculty, and students with cases to support their curriculum and independent research.

You can access the platform at: [http://sk.sagepub.com/cases](http://sk.sagepub.com/cases)

**What’s in it?**

- **The content** you can access through *SAGE Business Cases* will depend on the subscription at your library.
- It’s possible your library does not subscribe to all of our content.
- If you do not have access to particular content, you will see the following icon next to the resource: 
- If you aren’t sure which content your institution subscribes to, please check with your library staff.

**What’s in it?**

- **Original cases** are exclusive to the platform, and are written by Business & Management faculty who have extensive knowledge of teaching with business cases.
- **Repurposed SAGE content** has been adapted into the case format from resources already published by SAGE, including books and journal articles. Adapting the content in this way can save users time when searching for cases in these formats.
- **Licensed content from content partners** SAGE work with around 20 global content partners (such as Universities, business schools and professional societies), who often produce their own business cases, and then sell them at the library level.

**What’s in it?**

This slide gives a bit more information about each of the three channels. You can explore all of the Original cases [here](http://sk.sagepub.com/cases).
You can learn more about SAGE’s repurposed content [here](http://sk.sagepub.com/cases).
Content partners – highlight here the global representation of cases, i.e. cases from Tsinghua University in China, and the Indian Institute of Management.
You can learn more about our different content partners [here](http://sk.sagepub.com/cases).
Our Editorial process

- An in-house Editorial team dedicated to SAGE Business Cases content development
  - Source and develop relationships with prospective content partners
  - Identify potential original authors and follow commissioning process
  - Curate existing SAGE content
- An Editorial Advisory Board oversees the whole collection
  - Global B&M faculty
  - Well known to SAGE
  - Highly respected in their fields
  - Familiar with teaching with cases
  - Suggest top cases we can license
- Cases go through full peer-review
  - Submissions handled through ManuscriptCentral
  - A team of (external) reviewers check each case we publish
    - Ensures 'teachability' and viability in class
- Final publication into the SAGE Business Cases collection
- Cases will be updated if they age significantly

Who is it for?

- Faculty
  - Reduce costs by circumventing the pay-per-case model
  - Remove access barriers for students
  - Easily access a variety of cases from a number of different sources
  - Publish cases with SAGE
- Students
  - Access cases whenever, wherever, for course prep, revision, and self-study
  - Become more self-sufficient by going beyond assigned cases
  - Find related study resources such as books, reference works, and journal articles
- Researchers
  - Examine real-life business decisions and strategies for personal research
- Librarians
  - Enhance relationships with Business faculty
  - Save faculty money
  - Inform collection development, obtain data on usage and engagement of case content

Our Editorial process
This slide gives information about how the cases make it onto the platform. Our in-house editorial team source content for the platform in three ways. An Editorial Advisory Board provide support on suggesting cases, and with developing subject taxonomies. All cases go through a process of peer-review, with a separate team of peer-reviewers.

Who is it for?
Here you can show your participants what they can gain from using the SAGE Business Cases platform, depending on their role. You may like to edit this slide by showing only those user groups that your session is targeted at.
Getting started on the platform

The slides that follow are all screenshots from the platform in slide format. However, we recommend that you use these slides as a guide for a live platform demonstration, instead of showing the slides themselves. It is beneficial for participants to see how to access the platform from your institution’s homepage or library page, and to see how to navigate the platform live. The screenshots provide a suitable back-up for participants to review after the session, or in case you have internet problems during your session.

The SAGE Knowledge homepage

SAGE Business Cases are hosted on the SAGE Knowledge platform. This screenshot shows the SAGE Knowledge homepage, as well as the direct URL and information about other methods users can use to access SAGE Business Cases. Depending on your institution’s access level and settings, some options may be inactive and therefore the screenshot may look slightly different to your version.

The SAGE Business Cases homepage

This screenshot shows the SAGE Business Cases homepage, and the direct URL. Content is also able to be accessed through the library catalogue. Students might want to bookmark this link, librarians might want to add this link to a subject guide, and faculty might want to add this link to a reading list or link to it from a learning management system (LMS) or virtual learning environment (VLE).

Browsing by Content Partner and Academic Level

This screenshot indicates two ways in which users can browse cases by Content Partner and Academic Level from the SAGE Business Cases homepage.
Subject taxonomies

Browm by Subject to access the subject taxonomy to get a more granular breakdown of the Subject. This allows you to discover cases on your specialised topic or research area. Subject taxonomies are a great way of seeing what is covered in the collection, especially if you are not sure of your key word search terms.

Browsing by Subject
This screenshot indicates one way in which users can browse content by Subject from the SAGE Business Cases homepage.

Using the Quick Search

Use the quick search to look for key words and phrases. Run the search for your own terms, or click on one of the auto-suggestions to go directly to the resource.

This screenshot shows the quick search feature on the homepage, and some of the auto-suggestions users will see as they start typing their search terms.

Using the Advanced search

This screenshot shows users where to access the Advanced search, and some tips for running an effective advanced search using some of the main criteria fields.
**SAGE Business Cases filters**

Expanding Cases in the Content Type filter will reveal three SAGE Business Cases specific filters to narrow down your results further:
- Selecting *Teaching Notes* will display cases that come with these. 67% of cases contain faculty-only teaching notes, which contain discussion questions and suggested activities.
- Choosing *Academic Level* displays cases that will best suit your depth of knowledge on a particular topic or concept.
- Use the *Length (words)* slider to select how long your cases are, between 0 and 10,000 words.

**Viewing your results**

This screenshot displays some search results so that users can see what the results page looks like. It highlights the filters that users will want to use to refine their search results, on the right-hand side of the platform screen.

**SAGE Business Cases filters**

This screenshot displays a selection of SAGE Business Cases specific filters that can be revealed after expanding Cases in the Content Type filter. Users can use these to further refine their search results.
The Case page

Case page

This screenshot shows a case page. The call-out shapes highlight key functionality, for example downloading as PDF, downloading citations, and searching within the case for a specific word or phrase.

Case page

This screenshot shows a case page, and how to navigate to the teaching notes tab (not all cases come with teaching notes).

Please note: If you don’t have access to teaching notes, a padlock icon will display on the tab. To access teaching notes you will need to create a profile, and obtain a Verification Code from your library staff.

57% of cases contain faculty-only teaching notes, tried and tested by the case authors. Teaching notes contain discussion questions and suggested activities to use inside and outside of the classroom. To access those you will need to get a Verification Code from your library staff.
Creating a Profile
Encourage participants to create their own profile, and experiment with adding cases to a list. Allow 12-15 minutes to complete this, and then 3-5 minutes for feedback so participants can discuss some of the resources they discovered.

Creating a Profile
This screenshot shows users how they can create their own personal profile in SAGE Knowledge, and, for future reference, how they can log in once they have created their profile.

Saving searches
This screenshot shows users how they can save a search to their profile, once they are logged in.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.

Managing lists
This screenshot shows users how they can add a resource to a personal list, once they are logged in.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.
Managing your Profile

This screenshot highlights the different things a user can do within their profile once they are logged in, such as editing their profile information, accessing their saved searches, and viewing their lists.

Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.
Accessing teaching notes

To access the teaching notes, teachers will need to create a profile, if they haven’t already, on the SAGE Business Cases platform.

After you have logged in, click on My Profile at the top-right of the page, and then My Profile again from the drop-down menu.

Go back to the case page, and you will now be able to access the teaching notes for your case by clicking on the Teaching Notes tab.

At the bottom of the page lock the box called SAGE Business Case Instructor Access. A text box will appear called Verification Code. This Verification Code is a password set up by your library staff, so should be available if you contact them. Enter the code, and click Save.

Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.

Accessing teaching notes

This screenshot shows how a user can navigate to the My Profile part of their profile, and where to enter the Verification Code to be able to access teaching notes in cases.

Please note: This section may not be relevant if any of your participants are students or researchers. If you do not want students and researchers to be able to access teaching notes, which would give them access to the answers to the discussion questions or activities in the case itself, then do not give out your institutional verification code in the session.

To access teaching notes, faculty and staff members at your institution will need to create a profile on the SAGE Knowledge platform.

Accessing teaching notes

This screenshot shows where a user needs to go on the case page to be able to access the teaching notes.

Please note: Individuals who do not have the Verification Code saved to their profile will continue to see a padlock icon on this tab.