

FORMAT FOR TEACHING NOTE

Case Title

**Teaching Note**

***(Author(s))***

***(Institution(s))***

***(Date)***

***(add logo of your institution)***

# Case summary

* + Include brief description of case and context (could be the opening paragraph plus a bit of explanation)

# Keywords

* + Include 3-10 keywords describing the case setting (e.g. industry, country) and subject area – Watch out for requirements of case distributors

# Immediate and underlying issue(s); Learning objectives

* + List key issues (immediate and underlying issue(s)) and the intended learning objectives

# Target participants

* + Indicate target group or class level for which the case was written or can be used adequately (incl. comments on your experiences)

# Suggested participant assignment questions

* + Usually questions to guide the reading, but can also include other options (e.g. case write-ups etc.)
  + Here only assignments that are directly linked to preparing the case  
    discussion by the participants

# ((Analysis))

* + Analysis can be presented as separate chapter or integrated into teaching plan
  + Analysis should offer comprehensive answers to immediate and underlying issue and should, at least, be as good as to be expected from the best student
  + Analysis should include reference to and application of relevant tools, concepts, frameworks and/or theories
  + If the case includes quantitative data, suggest ways of utilizing the data, and should ideally include the details of any spreadsheet analysis. At the very least it should indicate the techniques to be used for analyzing the data

# Teaching plan

* + Describes how the case could be used in class how to conduct the discussion, especially with respect to the overall flow (the building blocks) of the session
  + Should focus on ***questions*** that will help to guide the discussion; especially ‘trigger’ questions for opening, advancing (esp. for moving from section to section within the session) and closing the case discussion,
  + Should include suggestions regarding learning formats (e.g. class discussion, group work, role play, pair discussions, individual reflection, vote etc.) and on how to consolidate the learning
  + Should contain information regarding the approximate timing per section of the session

# ((Blackboard plan(s)))

* + Integrated into the teaching plan or shown as separate chapter

# ((Alternative teaching plan(s)))

* + Integrated into the regular teaching plan or shown as separate chapter

# Recommended additional material for participants

* + Suggested additional readings should be listed if it is necessary (or helpful) for students to read text or other material (financial statements etc.) in conjunction with the case
  + Suggest material that can be requested as preparation from students in addition to the questions in “5. Suggested student assignments”. This can be e.g. textbooks, articles, webpages, videos etc.
  + Also include material that can be used by participants to investigate the topic(s) in greater detail voluntarily
  + Other instructors can then use the recommended additional material:
    1. either as optional or as required material and
    2. either as preparation or post-session debriefing material

# Additional material for facilitators

* + Suggested additional readings should be listed if it is necessary (or helpful) for students to read text or other material in conjunction with the case. Specific readings can be assigned from these lists.

# Other

## Outcome

* + 1. Actual outcome of the case situation/follow-up facts (rather only for publicly available information! Rather use a separate Case B in order to avoid need for company release of teaching note!)

## Distance learning

* + 1. An ever increasing number of institutions and students are using distance learning (either for entire programs, courses or individual sessions)
    2. Therefore you might want to add a separate section in your teaching note that describes creative approaches on using your case in distance learning
    3. Consider different types of distance learning (e.g. only distance, with webinars, blended etc.)
    4. See also the section above on Teaching cases in distance learning formats

## Cases for exams

* + 1. Cases are frequently used for exams – esp. in case-based courses
    2. Consider helping your colleagues by sketching some ideas on how to use the case for an exam and how to grade the exam