
Guidelines for Writing Teaching Notes

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Note: This guide for the preparation of teaching notes related to the case method is intended solely as a reference for professors and researchers interested in publishing their cases with the HEC Montréal Centre for Case Studies. The teaching notes accompanying a case study may differ in their structure and approach depending on the objectives of the case and the medium on which it is produced (paper or multimedia). In order to meet the pedagogical needs of today's students, creativity is not only welcome, but indeed desirable. Case writers are thus strongly encouraged to take advantage of new didactic tools using the latest technology. At the same time, however, it is important to keep in mind that the fundamentals of the case method remain the same, regardless of whether the case is produced on paper or in a multimedia format. In teaching, the medium in which the material is presented is of secondary importance to the pedagogical content itself.

Nature of the case

Summary

A few sentences will suffice to provide the context of the case, including elements such as the economic sector and main players involved and an overview of the issues raised by the case. The abstract used on the case registration form provided by the HEC-Montréal Centre for Case Studies would be suitable here.

Teaching objectives

In this section of the teaching notes, the author describes the learning outcome that the case seeks to achieve. For example, the case may serve to help students develop skills related to decision-making or the analysis of factors specific to a given sector (energy, cultural industry, brokerage, etc.). The case may also provide an opportunity to induce or illustrate theoretical concepts that can be applied to actual situations, including: the accounting treatment of certain transactions; an approach to interpersonal conflict resolution; the need to conduct market studies for new products or financial analyses for investment projects; the consequences of major strategic changes; the soundness of merger-acquisition decisions; the impact of technological change on a company's different functions; the reactions of executives to assaults by competitors; the legal implications of business decisions, and many other issues. If the case contains practical exercises, the teaching notes should provide the answers to the exercises.

Suitability for use in what types of training programs or courses

This section can describe the suitability of the case for a particular type of training (university programs, in-company training sessions, etc.) or level of study (college degree, undergraduate, master's, PhD) as well as its intended perspective (general or specific). The teaching notes can also indicate which clienteles are most likely to benefit from a discussion of the case, based on their professional experience (profile, number of years in the labour market, field of activity, specializations).

Relationship to the objectives of a course or program

In order to better describe the case's teaching context, it may be useful to point out what aspects of the general objectives of a training course or program can be covered by a discussion of the case. The author may also want to suggest other cases that address some of the secondary themes merely touched upon by the case or that approach the same issues from a different angle.

Sources and methods of collecting case material

In this section of the teaching notes, the case writer can share his approach to developing and preparing a case. He can explain the steps undertaken with company officials (interviews, conference papers, industry visits, observations in the field, etc.), methods of data collection (annual reports, financial statements, print or electronic media reports, press coverage, reference works, etc.). If the case presents an actual, undisguised company, the author could mention that the official authorizations were obtained in accordance with his teaching institution's code of ethics.

Links to specific management functions and realities

Links to other cases

Many cases provide snapshots of a management situation. In such cases, the author may want to explain how an issue that applies to a specific function in the company at a given point in time can have repercussions on the company's other functions or on other management aspects that are not directly addressed in the case. In this way, the author can open up other avenues of discussion for in-class debate and, perhaps, prepare the ground for the use of subsequent cases or for readings that will further students' reflection.

In-class discussion

Starting from the premise that a case only really becomes a case once it is discussed in the classroom, we arrive here at the core of the case study method and, hence, at a pivotal element of the teaching notes accompanying cases. The Centre for Case Studies at HEC-Montréal considers information on the in-class discussion to be an essential component of teaching notes.

Whether the case is presented in the traditional paper format or using a new technology, the manner in which the in-class discussion is conducted remains essentially the same. Technically,

if the students are equipped with laptop computers and if the classroom is wired for Internet access, the professor can, during the discussion, have the students use programs (ex., Excel), educational software, Web sites or electronic files that are pertinent to the discussion. In such cases, the teaching notes could propose specific instructions on how to approach the use of educational software or the processing of data using spreadsheets, or they could suggest Web sites related to the issues discussed and the companies appearing in the case. There is no question that HEC-Montréal encourages its professors to take advantage of new technologies and new didactic tools. At the same time, however, the primary concern of authors of case studies and teaching notes should be the transfer of knowledge and the development of knowledge and skills. As such, while the following points take into account the medium in which the case is produced, emphasis is placed on the pedagogical aspects of the case, keeping in mind that we are dealing with management education using the case method.

Questions to prepare students for in-class discussion

At the end of cases, one often finds a list of questions that serve to guide students' preparation for the in-class discussion. The teaching notes should suggest possible answers to the questions used by the students in their preliminary analysis or in their presentations. These answers will be in keeping with the pedagogical approach favoured by the case writer.

Questions the professor can use to open the discussion

Although the professor may have a clear idea of the knowledge and skills he wants to transfer to his students through a case, he may find it advantageous to take an indirect route to get there. For example, he may use questions that seem, on the surface, to bear no relationship to the teaching objectives, but that serve to challenge the students in order to reinforce the acquisition of new skills by means of an innovative pedagogical experience. This lead-in does not have to clearly identify, or even suggest, the problem or teaching objective at the centre of the case. On the contrary, forcing students to take detours can be more effective from a pedagogical perspective. In preparing the teaching notes, then, the author could give examples of this type of question, while indicating how these questions could ultimately serve the purpose of the case.

Questions to advance the discussion

It can be reassuring for a professor to have a few questions in reserve that he can use to reorient a debate that has strayed from the teaching objectives or to relaunch a discussion that has stalled. Two or three examples will likely suffice to illustrate how to regain control over a group and reorient the discussion toward the subjects and themes at hand. The author can also suggest questions here that touch on secondary teaching objectives.

Suggested sequence or timeframe for each point to be covered

While some professors prefer to structure their courses temporally, others prefer a sequential approach, and still others are content to cover all the material, regardless of the order or the time allocated to each point. By way of suggestion, the author of the teaching notes could establish an order of presentation for the points to be covered, assigning each a percentage or optimal

timeframe based on the duration of the course. Of course, professors are free to adopt the approach with which they feel most comfortable.

Use of the board to organize the discussion

Some professors make copious use of the blackboard, while others merely scribble a few words or diagrams in order to mark a downtime. Here again, the author can suggest ways in which the blackboard can be used effectively in relation to a case and its primary and secondary objectives.

Additional didactic elements

As mentioned earlier, the author may want to suggest Web sites or titles of CD-ROMs, Excel files or software that professors can consult when preparing for their course or suggest to their students. Overhead transparencies and PowerPoint presentations can also be used in class. If relevant to the situation, professors can also hand out paper documentation in class or indicate reading material, etc.

Report on preliminary use in the classroom

If the author of the teaching notes has already used the case in the classroom, he can report on his experience, indicating what worked well and what didn't work, and suggesting aspects that remain to be exploited. In a word, this is a good place to point out both traps to be avoided and elements that are rich in pedagogical potential.

Accompanying texts, concepts and theories

Links to accompanying articles

If the case is being used in a training program that includes accompanying texts, the teaching notes should specify how particular articles or research reports included in the collection or distributed in class can help clarify the concepts illustrated in the case.

Links to concepts and theories

The same applies to concepts and theories already covered in class or that the professor has dealt with or plans to deal with in subsequent courses using other cases. These links help students develop their own synthesis, serving to consolidate the learning acquired in class and to further their personal reflection.

Bibliography

The author of the teaching notes may want to propose a list of works that the professor can consult in preparation for the course in order to master the concepts and theories addressed by the case. It will then be up to the professor to choose which readings to suggest to his students.

Synthesis and conclusion

Depending on the nature, complexity and medium of cases, not all teaching notes will cover all of the points listed above. However, it is advisable to include, by way of conclusion, a synthesis of the main issues presented in the case. This can also be a good time for the author of the teaching notes to offer any tips or hints arising from his teaching experience that may be useful to users of the case.

Themes or article topics inspired by the case

In a broader perspective, the author could conclude the teaching notes by suggesting topics, avenues of exploration, or research hypotheses that could provide the basis for more detailed study, as well as possible article topics based on the reading and discussion of the case study.

A final word

We would like to emphasize that these guidelines for the preparation of teaching notes related to the case method are intended solely for guidance. All professors face teaching constraints to which they must adapt. However, can be helpful to be provided with signposts and information on the experience of other educators. This process is always a profitable one, particularly for those who use the case method “live”, where contingencies and unforeseeable events abound.

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