



ESSENTIAL COMPONENTS FOR EFFECTIVE TEACHING NOTES

The teaching note is an essential part of a case study, and a case is incomplete without it. It plays a vital role in ensuring that the case achieves its intended learning objectives by guiding instructors on how to structure classroom discussions, highlight key issues, and draw out critical insights. You should start developing the teaching note when a rough draft of the case has been developed. The development and use of both the case and its teaching note is an interactive and iterative process. Importantly, a case can be effectively used by instructors other than its original developer if a teaching note is available, as it enables others to adopt and adapt the case across diverse teaching contexts.

Components of Excellent Teaching Notes

A teaching note guides how to develop and use a case study by clearly outlining its learning objectives, identifying key areas of discussion and questions, and proposing strategies to introduce the case and facilitate students' analysis of relevant data and information. In addition, teaching notes assist instructors in facilitating participant-centred learning by providing guidance on how to use the case effectively in the classroom.

High-quality teaching notes consistently excel in three essential areas: (1) articulating clear learning objectives, (2) providing substantive analysis of the case content, and (3) outlining an effective teaching process.

1. Learning Objectives

Learning objectives serve as the foundation of a teaching note. The structure and content of well-crafted cases are closely aligned with these objectives, contributing directly to their attainment. Typically, these educational goals are refined and explained throughout the process of developing both the case and its teaching note, and are stated clearly in high-quality teaching notes. Effective learning objectives are distinguished by three principal characteristics: clarity, specificity, and positioning.

- i. **Clarity:** Learning objectives must be clearly expressed and distinguished from the issues or topics presented within the case. While case issues provide themes for discussion and exploration, they are not themselves the learning outcomes being pursued. Instead, effective teaching notes explicitly define what students should learn or be able to do as a result of engaging with those themes. Excellent notes clearly describe the intended learning activity or outcome, ensuring that both instructors and students understand the purpose behind the case discussion and how it connects to broader course goals.

Not all learning objectives carry equal weight. In cases where multiple objectives are identified, it is essential to indicate their relative importance and how they are interconnected. This helps instructors prioritize discussion points and focus on the most critical takeaways. Additionally, overloading a case with too many objectives can lead to confusion, fragment the discussion, and ultimately dilute the learning experience. Well-designed teaching notes thoughtfully balance the number and scope of objectives to maintain clarity, focus, and meaningful learning impact.

- ii. **Specificity:** In management education, the main objective is to develop the ability of students to analyse complex issues, formulate decisions, implement those decisions effectively, and manage companies in ways that create meaningful and positive contributions to society. Learning objectives outline the kind of learning a case is designed to achieve, each contributing to that larger educational goal. As the objectives are more specific, the guidance for what kind of information should be covered or ignored in the case and how best to structure and guide the classroom discussion is clear. Ambiguity in framing these objectives should be avoided. In excellent teaching notes, learning objectives typically encompass the following elements:
 - a. **Knowledge Enhancement:** This includes theory, concepts, frameworks, information, and institutional knowledge.
 - b. **Skill Building:** Focused on identification and analysis of a problem or opportunity, devising and execution of strategy, function-specific techniques, or other nonspecific logical abilities.
 - c. **Attitudinal Development:** Encouraging growth in self-awareness, values, beliefs, willingness to consider multiple perspectives, acceptance of change, and risk-bearing ability.
- iii. **Positioning:** In exceptional teaching notes, the importance and significance of the case and its learning objectives are clearly articulated within a broader framework of learning. This includes explaining how the case enhances a particular course, program, or module, as well as its ties to relevant literature. Cases both draw from and contribute to a body of knowledge, and teaching notes should reflect this alignment. Therefore, high-quality teaching notes offer a summary of the case and clarify how and why it is integrated within a particular course context for a defined student audience. When a case has multiple potential applications, it can be valuable to identify alternative uses in other courses, programs, or modules as well. This brief positioning description helps instructors while they review the teaching notes to identify appropriate cases or quickly scan the notes during their teaching preparation.

2. Substantive Analysis

The teaching notes encompass the analyses that students need to conduct and guide faculty in facilitating these analyses. These substantive analyses represent intellectual capital that fosters deeper insights into the topics and demonstrates the quality of critical thinking. Additionally, they serve as essential content for developing the teaching plan, and it can be provided in

different ways. Some authors prefer to give a separate section for the analysis and draw on those information while outlining the teaching process, whereas others integrate the analysis directly into a more detailed description of the teaching process, highlighting the type of analysis each question is likely to stimulate. There should not be any substantive additional information in the teaching note that is used in the analysis. Such information must be provided in the case.

Depending on the cases and courses, analyses will vary greatly. However, the following elements make the best teaching note.

- a. **Thoroughness:** Make sure the analyses are comprehensive and closely aligned with the learning objectives, demonstrating how the case both draws upon and contributes to the existing relevant literature.
- b. **Clarity:** Ensure that all the qualitative analyses and quantitative calculations are transparently presented, detailing the methods used and the specific case data involved. Additionally, scope for student discovery of insights are identified and explained.
- c. **Alternatives:** Provide alternative analyses, including arguments and calculations that evaluate the advantages and disadvantages.
- d. **Complications:** Highlight the potential analytical areas that students might find challenging, such as the use of externally sourced case data from the internet. Offer suggestions to instructors on how to address these issues if they arise.
- e. **Exhibits:** Mark exhibits according to how they are used in the analyses. In case an exhibit is not mentioned in the note, it indicates that the particular exhibit is irrelevant to the case. The exhibits of teaching note should be marked as 'TN Exhibit #'
- f. **Learnings:** Indicate the potential takeaways or concluding insights linked directly to learning objectives.
- g. **Supplements:** Suggest references to relevant literature and additional background materials that may assist instructors.

3. Teaching process

Guidance on how the case can be taught is important, and it reflects the pedagogical creativity of the instructor. Each case has a unique set of specific processes; however, the basic elements of an excellent teaching note include the following:

- a. **Discussion plan:** High-quality teaching notes offer a framework that outlines the key areas of discussion or sequential topics. In some cases, they are termed as discussion pastures or segments. The structure is flexible and undergoes real-time adjustments depending on classroom dynamics. However, it should offer a logical progression of learning, directly connected to the educational objectives.

Key elements to include are:

- ✓ An indication of the degree of flexibility in the sequencing of topics.
- ✓ Suggestions for smooth transitions between discussion areas.

- ✓ A tentative time allocation for each topic to help manage class flow.
 - ✓ A possible board plan, considering the limited space available.
 - ✓ Incorporation of classroom experience, which is especially valuable for flagging potential pitfalls and strategies to address them.
- b. Questions: A set of questions corresponding to the topic areas of the discussion plan is included in the best teaching notes, as they effectively guide the discussion. Different kinds of questions commonly included in high-quality teaching notes are:
- i. **Data-gathering questions** (what, who, when, why, where) that help to set up a particular analysis with relevance. However, they may also carry the risk of repetition of case fact, which may result in limited student involvement.

Eg. What are the key facts about Company X's market position and competitive environment?

Who are the main stakeholders involved, and what roles do they play?
 - ii. **Analytical questions** (how, why) that necessitate casual, analytic, or interpretative reasoning ability development.

Eg. Why has Company X experienced recent changes in its financial performance?

How do internal and external factors contribute to these outcomes?
 - iii. **Action-based questions** (what, why, how) that promote decision-making and execution skills.

Eg. What strategic actions should Company X take to improve its market share?

How should the company implement these changes, and why?
 - iv. **Challenging questions** (why) focused on deepening or expanding the analysis.

Eg. Why might some of Company X's current strategies be insufficient for long-term growth?

What alternative approaches could deepen the company's competitive advantage?
 - v. **Hypothetical questions** (what if) that enable students to broaden their analyses by exploring different assumptions beyond the information provided in the case.

Eg. What if Company X decided to enter a new international market?

How might this decision impact its existing operations and resources?

- vi. **Predictive questions** (what will) are used to develop the forecasting capabilities of students.

Eg. What will be the potential outcomes if Company X continues on its current trajectory without major changes?

- vii. **Generalization** (what lesson) that promotes a more abstract level of intellectual reasoning, and requires students to engage in reflective thinking before responding.

Eg. What broader lessons about strategic management can be drawn from Company X's challenges and successes?

How can these lessons apply to other companies in similar industries?

The question plan for a discussion topic typically includes a primary question followed by a set of subsequent questions. Besides, high-quality teaching notes provide a set of questions designed to guide the preparation of students. Instead of simply listing these questions, the teaching notes explain their purpose—for example, to deepen students' case analysis and understanding, and to focus on specific areas that require pre-class calculations. By incorporating in-class questions that extend beyond the students' pre-class work, the discussion builds upon their preparation rather than merely having them present their prepared answers.

- c. Opening and closing: The instructor's introduction to the case is a critical factor in setting its positioning, with the opening question often being the most important posed during the session. While the way a discussion begins may vary depending on classroom circumstances, high-quality teaching notes provide one or more proposed openings. This opening moment is fully within the instructor's control. So, planning it is possible and essential, considering how a class begins can significantly impact the dynamics of the entire discussion. Therefore, teaching notes specify and justify the opening, explaining its intended purpose.

Likewise, preparing a closing is important too, since it can considerably influence the student's learning experience. Closing the discussion is often more complex, as the dynamics and flow of the class may shape what is most effective. Therefore, the instructor should be prepared to adapt or even ditch an intended closing. While having a list of key insights is useful, it is important to tailor these to the actual discussion to avoid them feeling canned or disconnected from the class experience. Sometimes, ending with a provocative question can be particularly effective, and teaching notes may include one or more such questions as options for closing.

- d. **Special techniques:** There are many options for pedagogical creativity, with special techniques such as voting, role-playing, dyads, or breakout groups, and multimedia tools available for use. Excellent teaching notes provide detailed explanations of how these techniques can be implemented and how they influence the learning process.

Structure of an Effective Teaching Note

Teaching notes can be thorough and detailed. Ensure that the note provides the relevant and sufficient material to comprehensively support instructors in delivering the case effectively.

- **Abstract/Synopsis:** When developing a teaching note, it is best to begin with a synopsis or abstract of the case. This should include a brief description of the case content and the context in which it is set.
- **Learning/teaching objectives:** The teaching note should clearly outline the learning and teaching objectives. This includes identifying the key issues the case is designed to address, the skills and insights students are expected to develop, and the core concepts faculty are expected to deliver through the case.
- **Target learning group:** Identify the target learning group, such as undergraduate, postgraduate, or executive education audiences, or indicate if the case is suitable for multiple levels.
- **Intended Course/sessions:** Mention the position of the case in the course. This guidance supports instructors in integrating the case effectively into their teaching plans.
- **Required preliminary readings:** Provide information on any prerequisite knowledge or pre-learning that students may be required to do.
- **Teaching Plan/Strategy:** The core of the teaching note lies in its teaching strategy. This section should describe how the case can be used in class, including:
 - a) Suggested trigger questions to initiate discussion
 - b) The board plans to structure the analysis
 - c) Timing breakdowns for each component of the session
 - d) Ideas for group work and collaborative analysis
 - e) Recommendations for consolidating learning at the end of the session
- **Teaching mode:** Provide guidance for different teaching modes, such as in-person and online delivery, is especially valuable. For online formats, consider including how breakout rooms, polls, or collaborative tools (e.g., whiteboards) can be used to engage students effectively.
- **Discussion questions:** Include examples of discussion questions, along with typical student responses. It is also helpful to note any questions that have not worked well in practice, to inform faculty of potential pitfalls and alternative approaches. This gives instructors a better sense of the different pedagogical routes through the case and how students tend to respond.
- **Analysis of key issues and data.** If the case involves any quantitative analysis, provide supporting calculations or solutions so instructors can verify results and guide students

appropriately. A thorough examination of the discussion questions and how they tie into course concepts is also essential.

- **Background readings with references:** Including a list of background readings with references can further enrich the instructors and students understanding of the case. If possible, a brief summary of what happened next in the real-world situation can also be added. This is a common question from students and gives instructors the option to share the outcome if it aligns with their teaching objectives.
- **Experience of using the case:** Sharing the experience of the author using the case, including student feedback, what aspects worked particularly well, and what challenges were encountered, will provide a practical insight for other educators considering how best to use the case in their classrooms.

Key Elements for Effective Integration of Case and Teaching Notes

A case and its teaching note can be assessed individually based on their corresponding standards. Though, evaluating them collectively as an integrated unit is equally important. A high-quality case with a low-quality teaching note, or vice versa, does not meet the standard of excellence. Moreover, high-quality work will disclose a supporting link between the two. The integrative criteria are given below:

- **Synergies:** A case and its teaching note complement and reinforce each other, working together to create a cohesive learning experience. The teaching note uncovers the pedagogical richness within the case that would not be obvious from the case alone. Conversely, the case provides the foundation for the analytical rigor and insightful analyses presented in the note.
- **Transferability:** The case study and teaching note together equip an educator unfamiliar with the case to facilitate an impactful learning session.
- **Intellectual contribution:** Creative presentation of managerially important ideas or original concepts and illuminated in ways that foster deeper understanding and advance critical thinking.

Learning experience: The case and teaching note together can provide a highly impactful learning experience for students.

Processes Involved in Creating Classroom Cases and Teaching Notes

Creating high-quality pedagogical materials is a lengthy and meticulous process, comparable to the effort faculty invest in developing an excellent article or book chapter. It starts with an idea, often grounded in a broader research project or a specific course development requirement, and culminates in a careful cycle of writing, rewriting, and revising. The goal is to develop a stimulating and engaging classroom resource, thoughtfully paired with an insightful and well-crafted teaching note.

The important steps that a case researcher should follow while developing excellent pedagogical material are given below:

- Identification of case opportunity: The first step is normally stimulated by a course requirement, an opening of a site, or a chance to convey research outcomes into the classroom.
- Define the focus of the case: An important task that can be given as the first criteria in the description of learning objectives for a high-quality case.
- Obtaining access to the site.
- Negotiating the agendas of the case, data access, and interview schedule.
- Outlining the case and teaching note.
- Data collection: Involves an interviewing process and gathering of necessary documents to guarantee the completeness, richness, and robustness that define a high-quality case and teaching note.
- Revise and update the draft of the case study and its accompanying teaching note.
- Preparation of final draft: In this step, the author should make sure that the case study and teaching note adhere to the standards provided throughout this document. It is a process that involves the identification of any missing data that should be collected from the company.
- Obtaining consent for the case.
- Revisiting the case and TN: The quality of most of the cases improves significantly when they are revised based on their use in one or two classroom sessions. Initial teaching plans can then be developed fully into comprehensive teaching notes.

References:

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