

How to Write a Good Teaching Note

A teaching note is a document that accompanies a teaching case to help potential instructors gain insight into the case and achieve better usage of the case. Although it is not a rule for every case to have a teaching note, cases with a teaching note are proven more popular than those without. The Case Centre (www.thecasecentre.org) statistics show that while only 40% of the cases in its collection have a teaching note, 95% of the 50 best-selling cases have one. Almost all case writing competitions require both a case and an accompanying teaching note; the quality of the teaching note usually counts for 40% of the overall grade. It is fair to say that a case without a teaching note is incomplete, and thus, unlikely to reach its utmost value as an educational tool.

Who is my audience?

When writing a teaching note, it is *crucial* to remember that you do *not* write this for yourself but for many faculty members you do not know in order to help them better understand and utilize your case. Not all of these “strangers” have the knowledge of your case topic or the organization you described, so you have to guide them step by step through the case; show them all the important details; explain, analyze, and synthesize the information; and demonstrate how to use the information in class discussion to maximize the learning values of the case. Some details you think should be obvious in their analytical values still need to be highlighted and spelled out. The goal is to make it possible for fellow instructors to adopt your case without any additional research. You do not want them to email or call you repeatedly to ask questions about the case either!

Length

Teaching notes may vary in length: some are 20 pages and others are only two pages. While a good teaching case is short and concise, a good teaching note is detailed and comprehensive. It is very difficult to cover all the points in a two-hour class with a teaching note shorter than five pages.

Components

A teaching note has many formats – there is no single case standard, but some components are necessary to structure a good teaching note:

- Synopsis (a brief summary of the case and its conceptual context)
- Teaching objectives (3-5 specific objectives you want to achieve with the case)
- Target audience (the study and the level of students the case is suitable for)
- Case analyses and teaching plan (*please see the next section*)
- References or recommended readings

Tao Yue from the RSM Case Development Centre prepared this document as the basis for training and teaching.

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In addition to these necessary components, a good teaching note often includes the following as well:

- Teaching approach (whether the case can be used for written exams, role-plays, or combined with a video, etc.)
- Data collection (where the data are from and whether they are disguised)
- Assignment questions (for students to prepare before the class)
- Alternative analyses (e.g., a M&A case can be analyzed from strategic, organizational, financial, marketing and branding perspectives, to name a few)
- Feedback (how the case worked with different student groups)
- Epilogue (actual outcome of the case situation)
- Broader lessons (general lessons drawn from the case)

Teaching Objectives

Teaching objectives provide an overview of how the case fit within a course or the general discipline of a field and give teachers a guidance of how to use the case.

There are knowledge, skill, and attitudinal teaching objectives. Knowledge objectives refer to analytical tools, framework, or theories of a field. Skill objectives relate to the application of knowledge. Attitudinal objectives mean students will develop an attitude about their “managerial” or social responsibility after using the case.

Teaching objectives need not be too many, preferably 3-5 for a full-length case and 1-2 for a mini-case. They should be general enough so that they are important and relevant for the course you are teaching. At the same time, they should also be as specific as possible and measurable so that you can judge if your students have reached these learning goals after the course.

Using precise verbs to formulate your teaching objectives can help make them specific and measurable. For instance, if your objective is for students to *understand* a concept (knowledge objective), you can formulate the objective as “After discussing the case, students will be able to explain ... [certain issue].” If your objective is for students to *analyze* a situation with a new tool (skill objective), you can formulate the objective as “After discussing the case, students will be able to demonstrate ... [the way to solve a problem].” If your objective is for students to *appreciate* certain decision (attitudinal objective), you can then say “After discussing the case, students will be able to defend ... [certain action] with arguments.” Below are more examples:

Objective	Action verbs
Remembering	Define, duplicate, list, recall, repeat, reproduce, state
Understanding	Classify, describe, explain, identify, locate, select, translate, paraphrase
Applying	Choose, demonstrate, employ, illustrate, operate, sketch, solve, write
Analyzing	Compare, contrast, criticize, differentiate, examine, experiment, question
Evaluating	Appraise, argue, defend, judge, evaluate
Creating	Assemble, construct, design, develop, formulate, write

Case analyses and teaching plan

This is the most important part in a teaching note. A common way to organize the teaching plan is to draw a detailed roadmap of discussion questions and ask students to answer these questions by performing in-depth analysis – this analysis can be seen as the “answers” to the questions.

There are four categories of questions:

- Questions to prepare students for the discussion (can be also listed as a separate section, Assignment Questions)
- Questions to open the discussion
- Questions to advance the discussion

- Questions to close the discussion

Asking the right questions is a science as well as art. There should be a combination of open-ended and closed questions – use open-ended questions to stimulate discussion and closed questions to check whether students get the facts right. There should also be controversial questions to bring the discussion to a higher level.

Under each question is the corresponding analysis. In the analysis, you can suggest the application of relevant theories, models, and other analytical tools. Please remember always to refer back to the case, using the facts and numbers in the case to support your analysis. If you have included any financial data in the case, you should also explain it and its significance. The analysis should demonstrate at least one possible approach to answering the question. In most situations, there is more than one approach: You need to show the alternatives and indicate their advantages and disadvantages.

It is always advisable to create a timetable for the teaching plan: How much time is needed for each discussion question and how much is needed for the opening, closing, and transitions. If you notice any typical mistakes that students make in analysis during test runs of the case, you should also note them in the teaching plan and suggest how to guide the discussion when such mistakes occur.

Writing style

Unlike a teaching case that is written in the past tense, a teaching note is **always written in the present tense**. Apart from this, the writing style for a case can also be applied to a teaching note – clear, direct, and objective.

Commons pitfalls

To summarize, the common pitfalls to writing a good teaching note include:

- A skimpy teaching note;
- Too general teaching objectives;
- Too many or too few teaching objectives;
- Case analysis does not match case content;
- Discussing a theory without a purpose;
- Case analysis is a copy-and-paste from the case;
- Not enough open questions;
- Not enough closed questions;
- Not enough controversial questions;
- No sample analysis or sample answers provided; and
- No analytical tools provided.

Writing a good case takes time, and a good teaching note takes even more time. To perfect a teaching note, you need to teach the case a few times, observe class dynamics, gather student feedback, and revise the teaching note accordingly. Only submit a teaching note for release after it is taught, debugged, and refined (please refer to *RSM CDC case writing training material part 4: How to Arrange Case Release*). RSM Case Development Centre is happy to assist you with teaching note development and release any time!

References

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