

Writing an Outstanding Instructor's Manual



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Note from the Editor

One of the distinguishing features of the *CRJ* is the Instructor's Manual (IM) that accompanies every case. Our IMs have been vetted through the same rigorous peer review process as the case itself. The result is an IM that is both helpful for instructors, and a scholarly contribution that case authors can cite proudly in their portfolio of intellectual work. My purpose in publishing this article is to provide guidance to case writers striving to write an outstanding IM.

The commentary below was originally published by one of my predecessors, Lew Brown, as a "From the Editor" piece. I have added my perspective (DRE comments in italics) and some resources for further reference.

Our CRJ Editorial Policy identifies required elements to include in the IM. The Table shows the order in which Lew Brown discusses each section with some annotation from me.

Table: Sections of the Instructor's Manual	
IM Sections	DRE Notes
Synopsis	
Case Objectives and Use	May also be termed, "Target Courses and Usage"
Learning Objectives	
Linkage to Concepts and Theories	Could precede the Learning Objectives section
Research Methodology	Could also appear at the end, although I prefer this position
Discussion Questions	A list of the questions
Discussion	Each question repeated, with a discussion of expected responses
Teaching Suggestions	Could also be positioned before the Discussion Questions
Epilog	Optional section. I prefer the spelling "Epilogue," though both are acceptable
Exhibits, Appendices	Should be numbered, "IM Exhibit 1, etc."
References	Add complete bibliographic references for any citations in the IM

FROM THE EDITOR: THE INSTRUCTOR'S MANUAL¹

As I approach the end of my service as *CRJ* Editor, I looked back over my “From the Editor” pieces and realized that I have not written anything about the instructor’s manual (IM). I thought it might be helpful, especially for aspiring case writers, if I shared some of my thoughts on this subject.

In the “From the Editor” article in Volume 26: Issue 2, I included this paragraph as I discussed the subject of dissemination:

We require that our cases have an accompanying instructor’s manual to assist in teaching the case and to illustrate the case’s links to concepts and theories in the subject area. **Both** our cases and the instructor’s manuals are subject to our double-blind, peer-review process. We will not publish an outstanding case unless it has an outstanding instructor’s manual.

We call the IM a “manual” for a reason. Like the instruction manual that comes with an appliance, we design our IMs to assist and guide an instructor towards successful case use. It is also the term used by the AACSB in its references to case research.

We begin all of our IMs with a **Synopsis**. Former editor Dave Rosenthal, argues that this is the IM’s most important part. This might surprise you, but once you think about it, you realize Dave’s wisdom—after all, he is in marketing. One of the IM’s purposes is to facilitate dissemination. It should help prepare and enable an instructor to teach the case. However, first, the case and IM must get the instructor’s attention. An instructor going to XanEdu and searching for a marketing case may find a long list. The instructor’s next step would logically be to look at a case’s IM to determine its subject, what it is “about.”

This is where the synopsis is important. It is first in the IM with the purpose of presenting a concise overview. The synopsis, however, should not just be a dry list of some key information from the case. The author should attempt to write the synopsis in a way that will quickly inform the instructor about the case and do so in a way that will capture the instructor’s interest. The synopsis is the “marketing” part of the IM. Thus, good case writers spend time making sure the synopsis serves a role similar to the case’s “hook.”

DRE: The synopsis should not be too long (a paragraph or two is good), and should be written in the past tense as we also require in writing the case, to clearly fix the time frame of the case focus.

Next, is the **Case Objectives and Use** section. Here, the author highlights the case’s main purpose and the target course or courses for which the author developed the case. One caution: if you have a long list of target courses, you should ask yourself if you have done a good job of focusing the case. Although it may be technically possible to teach a case in a number of courses, cases that target many courses have a difficult time establishing links to concepts and theories in each course. Don’t try to do too much with one case. Excellent objectives and use sections also indicate where in the particular course a case might fit. Is the case a good introductory case, a good capstone case, or one that fits with a particular topic area? Might it be a good case to use as an examination?

DRE: I agree that authors often try to mention all possible uses for a case, or use vague terms to describe the target courses. As Lew mentions above, one purpose of the IM is to market the case. Instructors are looking for a case for a specific course, so it is much easier if

the IM is clear about what course the case and IM are designed to support. The best IM's are clearly designed for one, or at most two, courses. I find it helpful when the authors identify the course and level (UG, Grad, Exec) in which they have taught the case themselves. For example, "This IM reflects the approach the authors have used to teach the case in an MBA Managing Technology class. It could also be used in other courses, for example, Entrepreneurship or Strategic Management, in a module on technological innovation."

The **Learning Objectives** section should present specific student learning goals. What is it that you want the student to do or accomplish as a part of the case analysis and discussion process? The verbs here are important. In addition to verbs such as "analyze" or "evaluate," we like to see verbs such as "apply" or "recommend." We publish decision-focused cases. A goal of all our cases should be to have students develop and defend recommendations based on the decision the manager in the case faced. It is helpful to present these objectives in bullet-point format so that an instructor can quickly determine the objectives.

DRE: This is a section with which many authors struggle, and I plan to publish an article in the future with further advice on this topic. We have evolved from "teaching objectives" (what the instructor wants to accomplish) to "learning objectives" (what the students should gain in enhanced competencies—knowledge or skills). To achieve the potential of cases to enhance critical thinking, strive to write higher order learning objectives, such as "apply," "create," or "recommend," rather than "understand" or "be exposed to." Objectives should also state general competencies—what students will learn that they can transfer to new situations, rather than case-specific lessons. For example, rather than "Create a marketing plan for Product X," the objective might be, "Create a marketing plan for a new product launch."

The **Linkage to Concepts and Theories** section is a relatively new section. Here, we want the author to present the specific concepts or theories in a subject area that a student might apply in preparing the case. Does the case illustrate or allow the student to apply Porter's five-forces model, or the capital asset pricing model, or the theory of diffusion of innovations? This section allows an author to explain how a case or a series of cases explore concepts and theories in an attempt to apply or test them and to develop new concepts or theories.

DRE: The instructor will find it helpful if this section includes recent and popular references, and indicates if these are suitable for student assignment or for instructor background. If the theories or concepts the authors wish to employ are not well known or commonly used, this section might be used to explain them, or a longer explanation can be included in an appendix.

The **Research Methodology** section explains the research basis for the case, how the author gathered information. Except in rare circumstances, the *CRJ* requires that the author has conducted field research. That is, the author should have had contact with the subject organization and gathered information with the organization's support and cooperation. This is also the reason for the "certification" paragraph that we ask authors to include at the end of the IM.

DRE: This section is receiving increased emphasis as a tool for authors to demonstrate the scholarly nature of their work underlying case development. It can also serve as an example for readers of how to do case research in a particular area. As stated in our editorial policy, the authors should "disclose the research basis for gathering the case information, including any relationship between case authors and the organization, or how access to case data was obtained. Include any disguises imposed and their extent. Authors should disclose the

relationship between this case and any other cases published about this organization by these authors without revealing the authors' identity during the review process." Authors might consult qualitative research manuals for guidance in how to describe their methodology. For example, authors might include the number and length of interviews conducted, other primary materials gathered (e.g., company plans, government documents, legal opinions), whether on-site observation was done, and the sources searched for relevant secondary information.

These first five sections quickly allow the instructor to see what the case is about, its targeted courses and main objectives, the student learning objectives, its linkages to concepts and theories in the subject field, and how the author gathered the information.

Next, we like to see a list of the **Discussion Questions**, without the discussion. Again, this allows an instructor to see the questions he/she might use to guide the case discussion. We list them here so that an instructor who wishes to give the students the questions in advance can easily gather them and put them in the course syllabus or other instructions.

One thing I look for in a list of questions is an organizing logic. Do the questions build on each other and help the student analyze the case and build a basis upon which to base subsequent recommendations? Often, I see an IM where the first question is, "What should CEO Smith do?" Although we want students to have to decide and recommend, we want students to base their recommendations on solid analysis. The decision question should follow questions that allow students to analyze the situation and facts in the case and build a basis for their recommendations.

DRE: Some instructors like to differentiate between study questions that they assign students to prepare for class, and discussion questions that the instructor uses to guide the in-class discussion. If the author wants to make this distinction, I suggest including the preparation questions in the "Teaching Approaches" section, which can precede the discussion questions.

Then, the author should repeat each question followed by the **Discussion** of that question. A key factor here is that the discussion should use information in the case and NOT introduce new information that is not in the case. It is also not appropriate to suggest that students go to the Internet or otherwise gather new information. The author should set the case at a specific time, and the case should be self-contained. That is, all the information students need should be in the case. Students can do research to gather information that could have been available to the decision maker at the time of the case. However, a decision maker can't know things that happened after the time of the case. Further, the discussion section should not reference Web sites, which may not still be available at the time an instructor may be using the case.

DRE: Our caution to not include information in the IM analysis unless it is available in the case is to avoid the scenario where the instructor plays "gotcha," (bad form for student-centered learning), or unwittingly expects students to know something they can't know from the case. I disagree with Lew that web sites should be excluded from the IM, but the analysis should not rely on them, and the author might add a reminder that web sites may be temporary. I also think it's fine if authors want to mention in the "Teaching Approaches" section an assignment they use that involves outside research, but we do expect CRJ cases to be self-contained for achieving the stated learning objectives.

The discussion should present points that students might make and suggest points that perhaps only better students will present. If the discussion draws on exhibits,

especially financial exhibits, it should clearly show the source of the information. If there is, for example, a break-even analysis, the author should show precisely how he/she made the calculation and where the data are in the case, not just the result. Further, a good IM will use the case figures and exhibits. If you have an exhibit and never reference it in the discussion section, you should reconsider including the exhibit in the case. An exhibit should have a specific purpose.

DRE: Our editorial policy states that, “Authors should highlight analytic points that might be noticed only by the best students—points that might differentiate an ‘A’ grade on a written assignment.” I have noticed that this expectation causes consternation with some of our reviewers and one associate editor, who profess that they want to know the case writer’s analysis, not the students’, which might be faulty. I agree that we would like to know the case writer’s judgment about the issues discussed. However, knowing what to expect from students can be helpful for the instructor as well. One element included in some IMs that I find very helpful is a grading rubric, showing the instructor’s base expectations for a response and what a superior or inferior response might be. When there are many exhibits, the IM can benefit from including a list of the case exhibits with a short statement of the purpose for the exhibit and how it fits into the analysis and discussion.

It is in the discussion section that the author presents the case analysis. This is also where the author demonstrates that the case can accomplish the learning objectives. A common flaw in the IM is the failure of the case and analysis to meet the stated objectives.

DRE: The reader should be able to clearly see the connection across the theoretical linkages, learning objectives, and discussion questions. Some authors even note the number of the relevant learning objective(s) in parentheses after each discussion question in the list.

The analysis should indicate how theories or concepts can be applied to better understand the situation in the case or make recommendations for the protagonist. Extensive explanation of the theories in general terms tends to be cumbersome here, and is best introduced in the theoretical linkages section or added in an appendix.

By definition, we want students to have to deal with the decision the company or managers faced. There should be a question that asks the student what he/she would recommend and to support that recommendation with information from the case. The discussion of this question(s) should present the different recommendations students might make and the pros and cons of those recommendations. A case does not have one right answer. If the author presents one “right” recommendation, the case becomes a problem, like a math problem, not a case. Such “right” answers may reveal the author’s bias as to what the correct answer is. This is often a problem if an author has based the case on his/her consulting work.

DRE: To reinforce putting the student in the shoes of the decision maker, the discussion question should ask, “What should James, the CEO, do?” rather than, “What should the Company do?”

Throughout the IM, as in the case, the author must be careful to be unbiased and to present information in an unbiased way. Let students figure out what is “good” or “bad” in the case, or which managers are doing their jobs well.

DRE: As I stated above, I think instructors want to know what the case writer’s opinion is about the case. But the case writer should acknowledge reasonable differences of interpretation, and be modest in how conclusions are presented. Sometimes it is helpful to recruit a colleague to teach the case and review the IM, or even to become a co-author, in order to avoid biased analysis, especially when the author is too close to the situation.

Following the discussion section, a good IM will have **Teaching Suggestions**. This is why we recommend that a case writer test his/her case in the classroom. Such “field tests” will help the instructor see where there are problems in the case or places where students need more information. The classroom discussion will also help the author prepare the discussion questions and the discussion section because he/she will see how students handle the case and the points and recommendations they make.

The teaching suggestions section can also do things like offer good opening questions, outline blackboard plans, or suggest other associated assignments an instructor might use.

DRE: I find it is often helpful to include this section before the Discussion Questions, but it can work either way. If the author has used techniques such as role plays or a debate with the case, these can be explained here. Another useful addition is a brief lesson plan outlining the time allotted for each discussion section. The author might also provide summary slides as IM exhibits that the instructor could use to emphasize an analytical framework or wrap-up the case.

Finally, it is helpful to have an **Epilog** that describes “what happened.” We don’t care what happened, of course, as what the company did may not have been the best or “right” thing—assuming we could know that. However, students often want to know what happened and instructors have the option of sharing this information with them.

DRE: Some authors include additional discussion questions after the epilogue is revealed. If this discussion is extensive, it can become a “B” case that the instructor could distribute in class.

Writing an outstanding case is hard work. Writing an outstanding IM is equally difficult. The case and the IM are a package. Both need to be outstanding in order to earn publication in the *CRJ*.

Lew Brown

DRE: I thank Lew for his insights and agreement to reprint them here. We welcome your questions and comments.

SAMPLES

Instructor's manuals for CRJ cases may be viewed online by registered instructors through NACRA's distribution partners: **Xanadu Publishing** (www.xanadu.com), **ECCH** (www.ecch.com), **Harvard** (<http://hbsp.harvard.edu/>), **Pearson** (<http://www.pearsoncustomlibrary.com>), McGraw-Hill (<http://www.primisonline.com/>), and **Study.net** (www.study.net).

ADDITIONAL REFERENCES

Two books written by NACRA members familiar with *CRJ* conventions and expectations:

- Naumes, William and Margaret J. Naumes. 2012. *The Art & Craft of Case Writing*, 3rd edition, Armonk, NY: M. E. Sharpe (Chapters 5 and 8).
- Vega, Gina. 2013. *The Case Writing Workbook: A Self-Guided Workshop*, Armonk, NY: M. E. Sharpe (Module 4).

Two articles from major case publishers with helpful suggestions, but note that both omit a Research Methods section:

- Austin, James B. 1993. "Teaching Notes: Communicating the Teacher's Wisdom," Boston, MA: Harvard Business School (Product code: 9-793-105).
- Yemen, Gerry. 2010. "On Writing Teaching Notes Well," Charlottesville, VA: The University of Virginia, Darden School Foundation (Product code in HBSP database: UV4306).

NOTES

1. Reprinted with permission from the *Case Research Journal*, Volume 27, Issues 3 and 4.