SUBMISSION FORMS AND FAQ (SEE BELOW)

- Title Page
- Company Release
- Consent to Publish
- Writing a case
- Writing an instructor’s manual

TITLE PAGE MUST INCLUDE:

- Names, addresses, emails, telephone numbers, and affiliation contact information for all authors, with corresponding author indicated (see sample provided)
- Case title
- Case abstract (150 words)
- Keywords (five maximum to identify key topics in the case). Note: Project Management should not be one of the keywords for this competition, although it should appear in keywords upon publication.
- Statement of research (field research or secondary research). If field researched, you must include a Company Release
- This statement must be included at the bottom of the title page: “I/we certify that this is entirely my/our own original work and that it has not been published in any form prior to this submission.”

SAMPLE TITLE PAGE

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A SNOWBALL’S CHANCE: BUILDING COLLAPSE IN ST. CLOUD

An exceptional series of snowstorms dumped 49 inches of snow on the buildings and residents of St. Cloud, Minnesota in one week, adding to a significant previous snow buildup. Roads were impassable, emergency vehicles could not get through to the population, and roofs collapsed from the weight of the snow which far exceeded their maximum load-bearing capacity. Relief forces from as far away as Des Moines, Iowa and Winnipeg, Canada converged on the small city, resulting in chaos. One collapsed building, the largest by far in St. Cloud, was the Big Company warehouse, which was the hub for Big Company’s regional distribution. Dubbed the “100 Year Snow” by the local press, questions were raised about building codes. More questions were raised about Big Company’s management of the emergency, and still more questions were raised about St. Cloud’s inability to coordinate the influx of emergency workers.

Key Words: coordination, building codes, emergency response

This case has been field researched (release from Big Company attached).

“I/we certify that this is entirely my/our own original work and that it has not been published in any form prior to this submission.” (Jane Doe and John Brown).

COMPANY RELEASE:

All primary or field-researched cases must be accompanied by a release from the organization that states:

I have read this case titled (TITLE HERE) and authorize the use of this material in case competitions, journal and textbook publications, educational and training programs, and in electronic formats for educational purposes. This case is released without changes.

________________________________________  ________________
Signature                                      Date

________________________________________
Name and Title [please print or type]

________________________________________
Company                        Division          Country

CONSENT TO PUBLISH

Winning cases will be published, after additional review, in the Project Management Journal. At that time, authors will be required to sign appropriate releases.
WRITING A CASE

A case is a story. This story describes a factual series of actions that occurred in the past. When the case is written as a teaching tool, the reader is expected either to make a decision or recommendation to the protagonist for a course of action to pursue, or to perform an analysis of the action that has already taken place.

The keywords in this description are: story, factual, past, decision, and analysis. Regardless of which type of case you write, each of these keywords will apply.

- **Story.** A case is always a story. That means it must include a beginning, a middle, and an ending. It must involve narrative description, and often benefits from dialogue and human interaction. A case needs to be interesting to engage the reader on an emotional as well as an intellectual level.

- **Factual.** A case is based on facts. It is true to reality. It is not a fictionalized creation by the author. It must be supported by documentation, whether published documentation or derived from interviews or other forms of field work. The author’s opinion has no place in a teaching case.

- **Past.** A case takes place in the past, not in the present and not in the future. If the case were to take place in the future, it would be fiction. If the case were to take place in the present, students would not be able to analyze it based on outcomes. It would be guesswork, and education is not based on guesswork. It is based on application of theories and analytical perspectives to past situations.

- **Decision.** A case often requires a decision to be made. The reader is in the protagonist’s shoes and either must make a recommendation of action to be taken, or is considering the actions already taken and establishing a perspective as to their validity, based on theory.

- **Analysis.** The ultimate goal of teaching with cases is to encourage critical thinking in students, an aid of wise decision making. Cases require students to analyze situations and evaluate actions.

KEY ELEMENTS OF CASES

All cases contain some variation on the following eight elements. These elements rarely use as headings the didactically descriptive topic headings you will see below. Instead of “The Opening Hook,” a case is likely to begin without any heading at all. “The Company Story” or “History” is often headed with the company name. “The Industry” normally carries a heading that describes the content; for example, “Candy Manufacturing” or “The Auto Industry, 1950-1995.” “The Actors” is a heading you will only see in a case about theatre or movies. Instead, the protagonist’s name generally heads up this section. “The Situation,” “Additional Information,” and “The Closing Hook” simply use headings that describe the content to follow. “Appendices” are headed “Appendices” (or “Exhibits”).

- **The Opening Hook**
  This is the piece that is going to make people want to read more. In the fly fishing lexicon, this involves the initial cast. In the salt or fresh water fishing lexicon, it involves jigging the bobber. Either way, the target, fish or reader, becomes fully engaged. The fish wants to escape, while the reader is drawn in despite him/herself.

- **The Company Story/History**
  Stories make no sense without context. The reader needs to know when the company was founded, who works there, how large the company is, what the corporate structure looks like, and similar factual information. Give the reader enough information to get a full representation of the organization so that the reader will understand the situation clearly.

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The Industry

Many people who read your case will be unfamiliar with the industry represented in the story. Without some industry knowledge, it is very difficult to contextualize the action within the case and to understand the role the company plays within the industry. One way to do this is to write a miniature industry note, an in-depth look at an industry (energy, banking, automobiles) or a country or region (Russia, the Pacific Rim, Wyoming). This note should include sufficient historical background to provide a frame of reference for the reader, and often includes social, environmental, and economic data. The importance of the industry or region for understanding the case will dictate the amount of space within the case taken up by this note. At the very least, you need to situate your case situation within the broader framework of the industry or region you are addressing so that your readers are working with some knowledge of cell phone technology or the shortage of trained nurses or the increasing use of corn syrup in American foodstuffs.

The Actors

Readers of cases don’t care about situations, theories, or problems. They care about people. For that reason, case writers must really strive to represent the protagonist and other case actors clearly and graphically. The reader must feel empathy for one or more of the case characters in order to participate in helping that character to solve the case problem. To help the reader develop an emotional response to the case characters, these characters must exhibit personality, they must have a physical description, and the reader must get a sense of why the character is in conflict. A 6’3” bald body builder who is under the influence of steroids will evoke different responses than will a petite dark-haired dental hygienist who is picking up her lunchtime salad at the deli, so please be generous with your descriptors.

The Situation

The most interesting part of a story is the story itself—the narrative. However, the heart of a case is not the story; it is the case problem as developed in the telling of the story. The most interesting cases read like fiction, but they are not fiction. “Once upon a time…” has little relevance for cases. This is the section of the case in which you present the buildup to the problem, the problem itself, and various potential solutions being considered by the protagonist. Objectivity is the key to writing this section of the case. Since this section is all about action, take special pains to avoid passive statements and statements about what has happened. Don’t tell the reader about what happened—show the reader what happened. As Anton Chekhov tells us, “Don’t tell me the moon is shining; show me the glint of light on broken glass.”

Additional Information

Life does not follow a straight line, nor should a case narrative. Life is messy, with lots of side trips and occurrences that do not relate to the individual’s overarching life story. Cases are also messy, containing extraneous information and peripheral issues that distract even the most careful reader. This is a good thing, as your students will never be confronted with a business challenge that follows a straight line from problem through analysis to conclusion.

The Closing Hook

Returning to the fishing metaphor, this section sets the hook—it is the sharp jerk that motivates action or response from the reader. Be sure that the reader is motivated to help the protagonist solve his/her problem. The closing hook is like the opening hook, in reverse. It must hark back to the beginning of the case and transfer the case problem to the reader. The protagonist’s problem becomes the reader’s problem, and the reader feels compelled to help.

Appendices or Exhibits

This includes all those things that didn’t fit within the narrative but that provide the data that students need for analysis: organization charts, maps, product lists, financials, time lines, thumbnail descriptions, tables and formulae, statistics, demographics, and other data.

The Title

The title is the wriggling worm on the end of the hook that attracts the fish in the first place. The title should be descriptive. If the case is about quality control in a hospital, for example, you might consider a title like: Metropolitan Hospital: Sick of Errors. The title should include the name of the company if familiar. Any Fortune 500 company has a recognizable name, and this name may attract readers by its very familiarity. The title should tell the reader at a glance...
what the case is about. The academic colon is very useful to accomplish this goal. Simply follow the colon with the case topic, such as Big Company Name: The Challenge of Globalization or Joe’s Diner: The Search for a Head Chef. The title should be appealing. No one wants to read a boring case, so it pays to avoid tedium right from the start. The title may reflect the key decision that the case focuses on. General Motors Corporation: Too Big to Fail?

WRITING AN INSTRUCTOR’S MANUAL

The Instructor’s Manual (IM), also known as a Teaching Note, is the least visible section of the case, the bottom two thirds of the iceberg in the writing process. The IM is the element of case writing that makes cases acceptable scholarly presentations rather than simply good stories. The IM provides you with important benefits as well. It helps you to conceptualize clearly what it is you want to convey through the case. It is easy to get carried away by telling the story of the case and consequently forget that the case exists to teach something. The IM will “keep you honest” in your case writing activities. It establishes your professional credibility in the academic community. The instructors who use your case in the classroom can see at a glance that you are familiar with relevant theory, that you can contextualize learning, and that you are generous in sharing your knowledge with others.

CONTENTS OF A TYPICAL INSTRUCTOR’S MANUAL

■ Overview/Synopsis/Abstract
This element serves as the hook for your Instructor’s Manual. The readers you are aiming for in the synopsis are the instructors, the gatekeepers who decide whether or not to assign your case to the class. It is a marketing effort, and this is your best chance to convince instructors to adopt your case. In one brief paragraph, you must provide (as a minimum) an overview of the case story, a list of critical case events.

■ Intended Audience, Recommended Courses, and Placement
The potential users of your case need to know if your case is written at the right level for the class they have in mind. A case designed for undergraduates will be too simple for most graduate classes, and a case written for graduate students will be too complex for most undergraduate classes. A case written for an executive education program will not be suitable for either undergraduates (because of the complexity) or for graduate students (because of the inherent assumptions of work experience and job level held by the learners). You also need to identify one or more courses in which your case might be used and when in the term the case is likely to be taught. The more information you can provide for the potential user, the more likely your case is to be adopted broadly. Be sure your case is not over-ambitious in terms of the extent of reach of the issues raised and addressed. Think in terms of a class session rather than an entire course.

■ Learning Objectives
These describe specifically what you want students to learn. Please note that these are not teaching objectives, the things that the instructors want to teach. Cases are the core of student-centered learning, and therefore the learning objectives must be focused on student outcomes.

- Learning Objectives describe Actions. This is your opportunity to state unequivocally what students should be able to do after analyzing the case you have written.

- Learning Objectives are Measurable. The evaluative words we use so often are rarely measurable (Easy, clear, large, and well-written are all understandable in comparison to something else, but as objective measures, they fail).

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According to The National Accrediting Agency for Clinical Laboratory Sciences, “The following verbs **cannot be measured or are redundant**. They should be avoided when writing objectives: able to, shows appreciation for, awareness of, capable of, comprehend, conscious of, familiar with, shows interest in, knows, has knowledge of, learns, memorizes, understands, will be able to.”

- **Learning Objectives are Specific.** We are left with the onus of focusing on exactly our purpose in writing a case. Bloom’s Taxonomy suggests that skills in the cognitive domain center on knowledge, comprehension, and critical thinking. These levels can be described in detail by using words that spell out exactly what we want to quantify—verbs such as define, identify, estimate, paraphrase, compute, construct, prepare, illustrate, outline, compare, explain, and justify require specificity in their usage.

**Discussion Questions**

The goal of the Discussion Questions is to focus student analysis and guide the classroom discussion where you want it to go. These questions derive from the Learning Objectives. In fact, each Learning Objective should connect with one or more questions and each question, in turn, must relate to one or more of the Learning Objectives. Discussion Questions have three primary characteristics:

- They are **open-ended**; that is, cannot be answered with a simple yes or no.
- They are **analytical**; they require students to think critically about the implications and consequences of various courses of action.
- They pose a **solvable problem** that is neither too difficult nor too simple for the level of the student.

Discussion Questions must be answerable from the case; you must not include in the IM additional material that does not appear within the case itself.

**Teaching Strategies**

Some cases are best taught simply using the Discussion Questions, but other, more complex cases lend themselves to specific teaching strategies and student preparation, focusing on case preparation and teaching methods.

Case Preparation relates to things that must happen for students before the case can be discussed. For example, what must students have learned before being assigned your case? Equally important is the way you can make sure that students have had the appropriate academic exposure. Once again, specifics are key. Provide the full assignment:

- Prior to class, review the chapters in your text on Maslow, Herzberg, and Vroom.
- Read Chapter 7 in your accounting text and complete exercises 4 and 7 on page 278.
- Write a two-page, double-spaced summary that outlines the differences between teleology and deontology. Be sure to include examples.

Teaching Methods relates to things that must happen for the instructor before teaching your case. You need to make two decisions at this time. The first is your recommendation for how students will gain the most from the case.

- Is a lecture format appropriate? If so, provide the lecture outline.
- Is a traditional three-board format your recommendation? If so, provide the board outlines.
- Do you have a creative exercise to suggest? Provide the full instructions.
Literature Review, Theory, and Recommended Readings
Here is where you get a chance to show your real scholarly generosity by sharing your extensive subject matter knowledge with your peers. If the literature review or theory discussion is straightforward, it is a simple matter to outline basic theory. If your case is about motivation, a several paragraph outline of the perspectives of three frequently-taught theorists will suffice. If your case is about a topic that requires considerable elucidation, you may have to write a bit more. A brief differentiation between teleology and deontology demands a set of clarifying examples in order for the theory to be applied properly. Performing this simple service for your colleagues will save a lot of effort and frustration for instructors who are prepping this case quickly or who are unfamiliar with the theories.

Answering Discussion Questions
When writing the answers to discussion questions, you need to put yourself in your students’ shoes. The questions should be answered from their perspective using language they are likely to use rather than from your significantly more sophisticated perspective and your tendency to use academic language. Two important points to remember when writing the answers to discussion questions:

- Use the same language and complexity you would use to answer these questions for your grandmother (assuming your grandmother is not also a professor). Avoid writing, “A good student answer will include a discussion of several methods of financial analysis.” Instead, provide the financial analysis.

- Present realistic expectations of what an instructor might receive from a student. Even an A-student is not going to answer the questions as fully as you would, but a less complete answer may still be acceptable for discussion purposes.

Epilogue
Students always want to know “what happened.” Even the most sophisticated of learners in executive education programs ask at the end of the case discussion what the protagonists actually did. The epilogue provides information about the aftermath of the events in the case. It describes the decision that the protagonist made and allows students to compare their own recommendations to the actions actually taken. It completes the story and brings closure to the problem under analysis. It is one of the easiest pieces to write because it is a simple recitation of factual information, and it also provides closure for the case writer. When the epilogue is written, you are done.