Guidelines for Writing a Teaching Note

A teaching note is an integral part of any teaching case. It not only helps an instructor prepare for and teach a case-based class by providing an overview of the nuts and bolts of class time—including what types of questions to ask, a guide for how much time to spend on various parts of the discussion, and what to put on the board—but also provides background on the pedagogical purpose and learning objectives of the case. In essence, it is a roadmap—it lays out a plan for how to spend class time and how to get the most out of the teaching opportunities along the way. It also gives a potential user an idea of how to use the case in a particular course.

According to Professor James Austin at the Harvard Business School, teaching notes play five important roles: they increase teaching effectiveness; save time; build confidence; guide case writing; and contribute intellectual capital. He goes on to say that a good teaching note should describe what the case is about; where it fits in a course; why we are teaching it; what we are going to teach; and how we can teach it.[1] Although there is no strict format for a teaching note, it usually contains the following components (based on Roberts[2]):

- **Overview or synopsis of the case:** a paragraph or two that describes what the case is about including who the protagonist is, the issue or challenge being faced, and the learning objectives of the case. It may contain key sentences from the first paragraph or the introductory section of the case itself.
- **Learning objectives:** what knowledge, skills, application of concepts does the instructor expect students to learn during the class discussion.
- **Preparation questions:** if there are questions posed in the case, they can be repeated here for easy reference by the instructor. Alternatively, the instructor can insert customized questions into the course syllabus. These preparation questions serve to focus the students' attention on the objectives of the case as they prepare for class. These can range from very general ("What should Ms. Brown do and why?") to more directive ("How might Table 1 inform Ms. Brown's decision?"). These questions do not need to be the same as the discussion questions used in class.
- **Roadmap for discussion:** provides a detailed roadmap of the discussion plan for the class, including a suggested allocation of time to spend on each section. This is the most important part of the teaching plan and should provide:
  - Suggestions for the instructor on how to start the class and manage transitions.

---

[1] Austin, JE. *Teaching Notes: Communicating the Teacher's Wisdom*. Harvard Business School Publishing, Boston, 1993.

[2] Roberts, MJ. *Developing a Teaching Case (Abridged)*. Harvard Business School Publishing, Boston, 2001.

- o What questions to ask to stimulate the desired discussion. Discussion questions need to actively engage students in defining the problem, analyzing its causes, identifying possible interventions/solutions, and making decisions based on judgment informed by what the course is trying to teach. Avoid asking questions that simply test students' knowledge of case facts or background readings. Seek questions that do not have obvious or even any correct answers, or that force students to apply background readings to the case. Questions should push students to make decisions whether or not they are "comfortable" with the adequacy of case facts.
  - o Other techniques that encourage active learning on the part of all participants to the discussion (taking votes during the class, role-playing, breaking into small groups, etc.)

- **Wrap up:** suggestions for a summary of the issues of the case and the key take-away points. The instructor should make sure that these points tie to the class discussion so that students don't feel that their work has been off-base or pointless.

- **Board plan:** a plan for what should be put on the board or boards of the classroom to provide structure to the discussion, and to summarize key points. Some structure (e.g., headings or topics) for gathering key points may be put up before the class begins while others may be added during the discussion. It is always a good idea to know how many boards there are in the class (and how they may move and/or block each other) in order to use them effectively.