

# Case Evaluation Checklist

We encourage case writers to use these criteria as quality assurance measures in the preparation of their case.

## Case Narrative

- Name, position, company of case protagonist is clearly identified in opening paragraph
- Issue(s) or decision(s) is/are clearly defined in opening paragraph
- Action trigger is clearly stated in opening paragraph
- Company history/background is precisely tailored to case focus
- Case narrative clearly supports the issue(s)/decision(s) that is/are at the heart of the case
- Case is written entirely in past tense
- Case events presented in clear, logical chronology
- Quotes from case personalities increase reader interest in case
- All secondary information is accurately identified and correctly cited using the [Harvard reference system](#)
- All case exhibits, figures and tables are clearly, accurately labelled
- All case exhibits, figures and tables are sequentially labelled
- Tone of case is neutral, devoid of any case writer bias/personal judgment
- Case issues/decisions are significant and compelling
- Case issues/decisions demand sustained critical thinking
- As appropriate, case narrative clearly invites readers to move from techniques and concepts to theories
- Case issues/decisions lead to lively class discussions
- Case is a realistic platform for generating multiple alternatives about which reasonable managers can disagree
- Data and exhibits are complete enough/sufficient enough for students to conduct required analyses
- Overall, case provides readers with an interesting, engaging voyage of discovery
- Case length is matched with case difficulty

## Teaching Note

- Teaching note begins with short, accurate case synopsis
- Teaching note includes a minimum of three, clear learning objectives
- Teaching note identifies the level of case difficulty
- Teaching note states the course(s) in which the case can be used
- Teaching note has a minimum of three meaningful case discussion questions
- Teaching note provides complete answers/responses to each case discussion question
- Teaching note includes worksheets and data analyses for all required quantitative reasoning questions
- Teaching note clearly identifies the relevant theory supporting the case's central issue(s)/decision(s)
- Where alternative opinions/approaches are possible, teaching note acknowledges and discusses these
- Teaching note has evidence that both the case narrative and case discussion questions have been class tested