

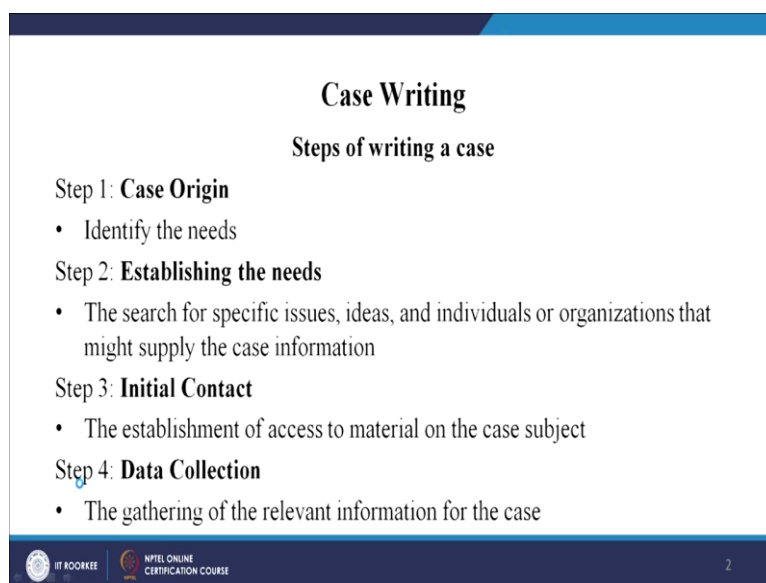
Training of Trainers
Professor Santosh Rangnekar
Department of Management Studies
Indian Institute of Technology Roorkee
Lecture 25
Training Methods: (Case Study - IV)

In earlier models we have discussed in length the case analysis, how to do the case analysis? What should we approach? How trainees are to be informed? Which template is to be used? When, where and how and now we will talk about that is the another training aspect that is the case writing.

However, we can take that case writing workshop for 3 days and during these 3 days the steps we take to first concepts, then visit to the industry, then coming out with the problem, then drafting of the case study, then presentation of the case study, then the corrections in the study whatever has been suggested, then having the interaction with the students giving them the case study taking the feedback from them that if anything is missing from the point of view of the reader, then that we consider and finally we develop that particular case study.

The case study is which you been developed that those case studies are published into the case centres in the UK and then the eco of these case base data base, so these type of cases studies development, those case writing workshops that can be conducted as a method of training. So I will be talking about that is how to write the case study and how to conduct the case writing workshop.

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Case Writing

Steps of writing a case

Step 1: Case Origin

- Identify the needs

Step 2: Establishing the needs

- The search for specific issues, ideas, and individuals or organizations that might supply the case information

Step 3: Initial Contact

- The establishment of access to material on the case subject

Step 4: Data Collection

- The gathering of the relevant information for the case

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Now, as I mention that is the first, the first in the beginning we will start with the concept of the case and case analysis which I have covered into the 16, 17, 18 and 19 module that is the how these cases are important and why we should use the case study in the teaching method and how to focus on the solutions to the problems.

Now here in steps of writing a case, second step will be to visit the industry. If there are suppose 25 to 30 participants, we can make a group of 5 to 6 with each group with the 4 - 5 participants and take them to the industry. After reaching to the industry then we have to ask, earlier the appointment must have been taken and we have to meet that particular may be the HR executive.

A person who is going to brief us that is what was the issue and how the issues have been handled by the organization or was there any problem and then that what was the problem and how the problem has been solved? Or that is not been solved, so therefore, that person will inform us about this particular input for the case writing. So we meet that particular person industry executive who is going to share that particular event or that particular decision by the industry.

So we start with the case origin, first we will identify the needs that what are the needs of that particular decision making problem, the needs are that is either organization this specific issue may be that is there are certain ideas. I would like to mention that is the number of cases which I have developed, in that case study one case study was about the X company and X company that was confectionery industry and they were manufacturing biscuits, while a particular order has come for the export, so using that particular production process the air conditions was provided in that particular shop floor to maintain the quality of the biscuits as per the agreement.

Then export order was over and biscuits were sent and now the air conditions which was used for making those biscuits they were started removing from the shop floor and this created an IR problem industrial relations problem. The worker said that now these air conditions cannot be removed, now that it will be the part of this particular shop floor and now you cannot remove these air conditions, but the management was of the opinion that these air conditions were made available only for a particular export order and that created an IR industrial relations issue.

So this was the input, now that was the need that is whether we have to focus IR industrial relations or here we have to focus the another aspects of the HRM Human resource management. So that state one is that it is case origin, so origin of the case was that is whether there should be the air condition to be allowed and no IR problem or air conditions are to be removed and then that will convert into IR problem.

Establishing the needs, the step number 2, the search for the specific issues, ideas and individuals or organization that might supply the case information, so therefore it becomes very important that is for a specific issue and ideas like in this particular example which I have illustrated the individuals are organization like the HR manager or that particular company that my supply the case information.

So that particular information will be provided in sequence wise that particular executive that is what happens the first month what happens, the second month what happens, third month what happened, what were the important events on which that a particular important event and this full information that will be provided in the establishing particular needs is there.

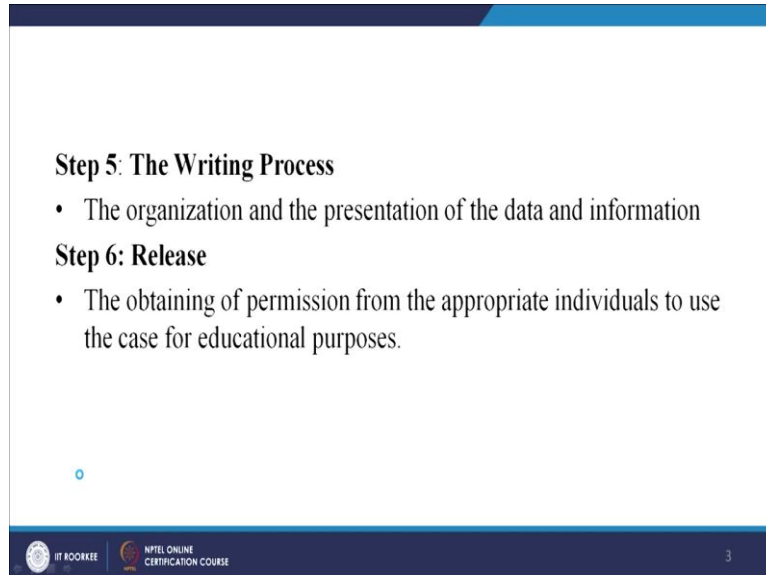
Then initial contact, now the establishment of the access to material on the case subject, so it should be very clear that is whenever we are making the initial contact we tell to the particular organization that these information will be used for the Academic purpose, sometimes they allowed to disclose the name of the organization, sometime they ask to disguise the name of the organization. So in initial contact this clarity is to be there that is what will be the theme? What will be the case?

What information he is going to share and whether this case can be published or cannot be published after writing this case study and if it is to be published whether the name of the company can be given or the name of the company cannot be given? So therefore, that will be initial contact and that initial contact is to be taken into the discussion as soon as we start and think of writing the case study.

Next step is the data collection, the gathering of the relevant information for the case, so we visit to that particular place industry, it is always better that we visit to the industry, we can invite the executive also in the workshop case writing workshop and there he can share in the classroom, but to get the feel of that particular organization, they get that particular understanding that is how the organization works, the author of the case should visit the place

where what about the case he is writing and therefore the data collection is to be gathering of the relevant information that is to be collected.

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The slide is titled "Step 5: The Writing Process" and "Step 6: Release". It contains two bullet points. The first bullet point is under Step 5 and the second is under Step 6. The slide has a blue header and footer. The footer contains the IIT Kharagpur logo, the text "IIT KHARAGPUR", the NPTEL logo, the text "NPTEL ONLINE CERTIFICATION COURSE", and the number "3".

Step 5: The Writing Process

- The organization and the presentation of the data and information

Step 6: Release

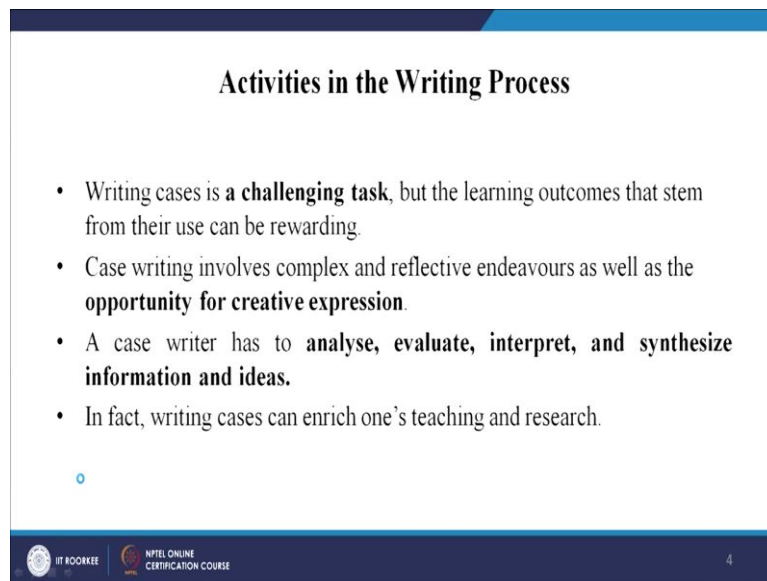
- The obtaining of permission from the appropriate individuals to use the case for educational purposes.

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Step 5 will be the writing process, the organization and the presentation of the data and information, that presentation of data and information will be organised in such a way that is the case writing format will be there which I will be discussing further that is whenever we are collecting this data we come back to the Institute and there we make the sequential writing of that particular information and convert into a case study.

Then this writing the obtaining of the permission from the appropriate individuals, once the draft is ready, the draft is again is to be sent to the industry person and we have to ask him that is this is the draft, this is the content which we are going to publish whether your permission is there or not and many a times it has been seen that is if it is very constructive case study the organizations allow and if it is about any particular IR problem and then in that case the organization may not allow and they may say that is they use the case with disguising the name of the organization and the case for the educational purpose and that will be used. So whenever for the academic purpose case is used then the organization do not have any problem.

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Activities in the Writing Process

- Writing cases is a **challenging task**, but the learning outcomes that stem from their use can be rewarding.
- Case writing involves complex and reflective endeavours as well as the **opportunity for creative expression**.
- A case writer has to **analyse, evaluate, interpret, and synthesize information and ideas**.
- In fact, writing cases can enrich one's teaching and research.

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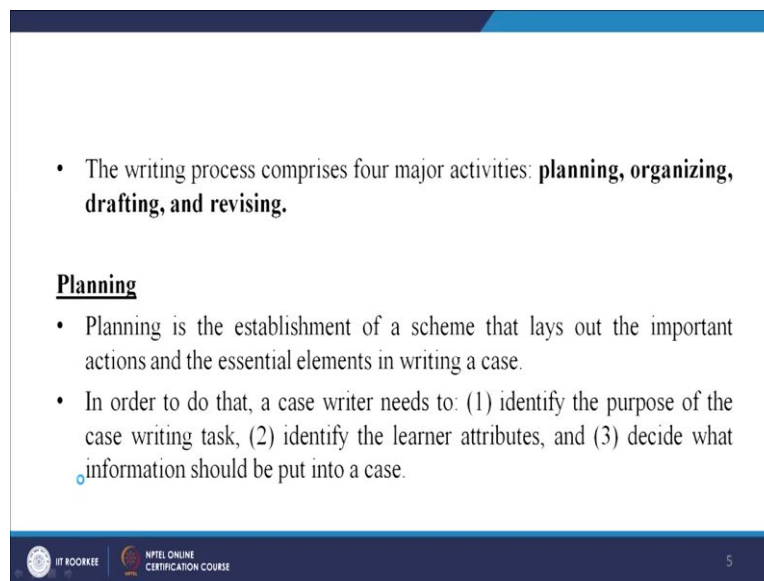
Now what are the activities are there in the writing process of the case study. Writing cases is a challenging task, but the learning outcome that stem from their use can be rewarding. So when we go for this particular task that is taking the permission, visiting to the industry, contacting that person then sharing out the information, the drafting of the case and then sending back and taking permission to release, then definitely it becomes very very challenging task, but what is the outcome? The outcome is very much rewarding.

The person when this case study is published then he feels very much honoured that this yes he has contributed may be a little significance ready for the world of academia. Case writing involves complex and reflective endeavours, the reflective endeavours will be that is in that case writing that they will go through this particular whatever the process what they have adopted then that will be reflecting on either the HRD scenario may be related to the particular function of HR or a particular topic of the OB organizational behaviour or may be related as the opportunity for just (expressing) making creative expression and that will help them that is the how they take this particular study materiel to the classroom by creating their own.

A case writer has to analyse, evaluate, interpret and synthesise the information and ideas and therefore, in the case writing because what we have discussed earlier that was that was already there was a case and then we have done the case analysis, here we are talking about the case writing and when we are talking about the case writing then the case author should be able to also write the analysis and evaluation of his decisions, the interpretation of data whatever he has collected and synthesise in the form of a case study.

In fact writing cases can enrich one's teaching and research, naturally when we make our own case studies, we should encourage and motivate to the faculties especially the young faculties that is they should visit to the industries, they make their own case studies on their area of expertise and they should share in teaching and they should share into research, that research is the part that they will be sharing with the students and that will open new vistas for their further research.

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- The writing process comprises four major activities: **planning, organizing, drafting, and revising.**

Planning

- Planning is the establishment of a scheme that lays out the important actions and the essential elements in writing a case.
- In order to do that, a case writer needs to: (1) identify the purpose of the case writing task, (2) identify the learner attributes, and (3) decide what information should be put into a case.

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The writing process comprises four major activities first is planning, second is organising, third is a drafting and fourth is revising, so these factors we should focus whenever we are going to write this particular case study that is the what we will write I will discuss in planning, organising, drafting and revising. Let me take the first factor and that is planning, planning is establishment of a scheme that lays out the important actions and the essential elements in writing a case.

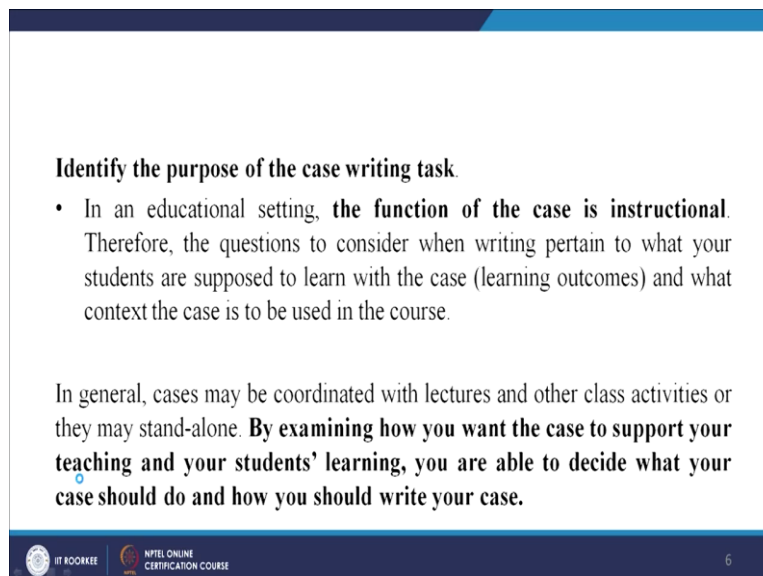
So here is establishment of a scheme that what are the important actions were there in this particular case study that we have to plan how we will collect that particular information and what are the essential elements in the writing a case. For example, the body of the case that I will discuss in organising also that is how we will develop that particular case study that planning should be in our mind whether this is related to a particular area, this will be related in a particular format, this will be related in a particular perspective, so all these are to be considered in the stage of planning.

In order to do that a case writer needs to identify the purpose of the case writing task, why should we write the study? It is not only for the publication purpose, but the basic purpose is that this practical case study we can share in the classroom and we can educate our students with the realistic facts and figures, so that should be the usefulness for the teaching, that should be the primary objective according to me for which the purpose of the case writing is to be done and the publication of that case study that will be the reward.

Identify the learner attributes, now those who are the trainees, those who are interested to write a study and join your workshop again I have mentioned earlier modules also that is the trainer should know the attributes of the trainees Once you know the attributes of the trainees then only you can find out the right way, right path to direct them, get work done and helping them according to the needs.

And the third one is decide what information should we put in a case and I have mentioned we should be clear with the theme, if the theme is clear than the point number 3 will be very clear that what information should be put into a case. However, whenever we are drafting of a particular case many times unrelated information to make a comprehensive case study, to create a complete case study we may be writing but it may seem that is the information is not that is relevant and if that information is not relevant then we have to tell at the time of analysis that eliminate unrelated information.

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Identify the purpose of the case writing task.

- In an educational setting, **the function of the case is instructional.** Therefore, the questions to consider when writing pertain to what your students are supposed to learn with the case (learning outcomes) and what context the case is to be used in the course.

In general, cases may be coordinated with lectures and other class activities or they may stand-alone. **By examining how you want the case to support your teaching and your students' learning, you are able to decide what your case should do and how you should write your case.**

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Identify the purpose of the case writing task. In an educational setting the function of the case is the instructional. So therefore, this particular instrument of the case is use for the

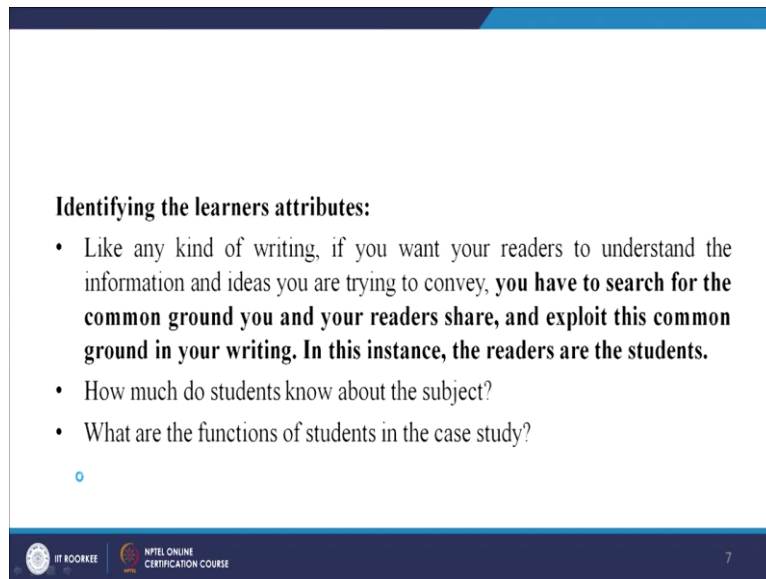
instructional purposes. The question to consider when writing pertains to what your students are supposed to learn with the case? So if it is the IR they learn about the labor laws, industrial relations, if it is related to HR then they understand the strategies of the recruitment and from a selection process may be the promotion policies, may be the transfer policies and that will be the learning outcome from them that is how industry work and work contacts the cases to be used in the course.

So in the course how is it relevant? Whatever the theory I have discussed in the earlier module that is whenever there is a theory the case study is a particular aspect of that theory. So this case study will help that particular theoretical aspect. In general cases may be coordinated with the lectures and other class activities or they may stand alone that is possible that is they may be with the normally the cases are based on a (particular) like if we refer the books, textbooks we find that at the end of the chapter there are certain case studies are given, certain books are giving the comprehensive case studies at the end of the last chapter and that 2 to 3 more comprehensive case studies will be given.

So they are very exhaustive case studies are there or there can be small caselets also, what is a caselet? Caselet means the small cases, so small cases will be developed at the end of the every chapter and on basis of that these particular case writing, these caselets that can be used to connect with what has mentioned with the lectures and when coordinated with the lectures then we can conduct the other activities also otherwise discussing in isolation the case that is not advisable because that will not give you a connect.

So if academic connect is to be given that academic connect will depend on that is how this studies they have been connected with the theoretical concepts. By examining how you want the case to support your teaching and your students learning, you are able to decide what your case should do and how you should write your case. So therefore, if you examine all of these aspects, your subject aspect, your topic aspect, the problem identification, the use of that particular case study relating with the particular chapter, coordinating with particular theme then whatever is decided then you will be able to write your case study.

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Identifying the learners attributes:

- Like any kind of writing, if you want your readers to understand the information and ideas you are trying to convey, **you have to search for the common ground you and your readers share, and exploit this common ground in your writing. In this instance, the readers are the students.**
- How much do students know about the subject?
- What are the functions of students in the case study?

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Now, second very important point is the learner's attributes. Like any kind of writing if you want your readers to understand the information and ideas you are trying to convey then you have to search for the common ground you and your readers share.

Now here I would like to take the example of the MBA students, so MBA students the common share is Management Education, so Management Education and learning from the management lessons these case studies will be very much helpful and exploit this common ground in your writing and therefore, whenever we are writing the case studies we have to focus that is these cases are to be read by the professional from the Management Education.

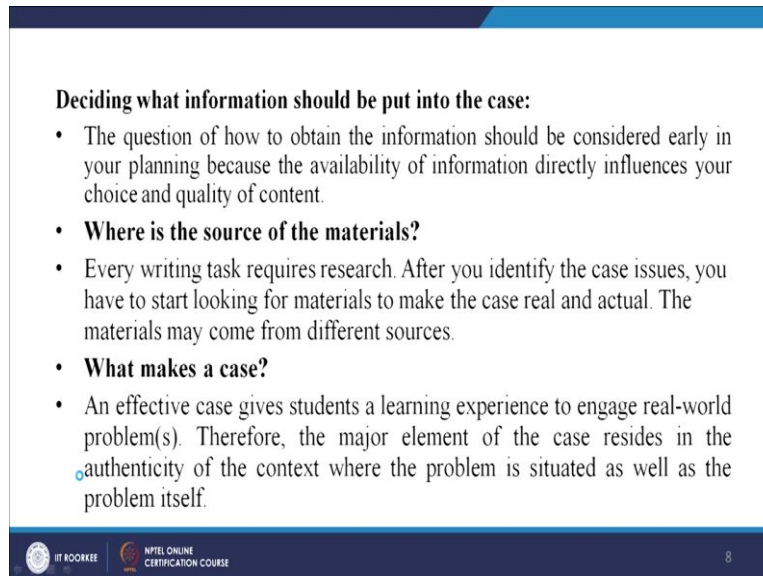
In this instance the readers are the students, so therefore, I have given the already example that is the here whenever we are writing the case study, then the case studies invariably these are used for the management education and when they are used for management education naturally the stakeholders or beneficiaries are the students.

How much do students know about the subject? Then the students know about the subject where that is the on basis of his analysis, when we write the case many cases are supported by the theoretical models and therefore, when they read the case they can understand whether they are able to connect the theoretical model or with this particular case study.

What are the functions of students in the case study? The functions of the students is that is the analysis of the case, provide recommendations and get the best solution, so therefore, this smart student will be able to identify the problem and then through his recommendation he will provide the solution.

Now here sometimes that is the author does not write the solution though he knows the solution and then he gives the case study and then ask from the people what organization should have done? And then it is found that is the those who are making the proper and thorough analysis they are closed to the same solution which the organization has taken successfully, so therefore that will be also the learners attribute.

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Deciding what information should be put into the case:

- The question of how to obtain the information should be considered early in your planning because the availability of information directly influences your choice and quality of content.
- **Where is the source of the materials?**
- Every writing task requires research. After you identify the case issues, you have to start looking for materials to make the case real and actual. The materials may come from different sources.
- **What makes a case?**
- An effective case gives students a learning experience to engage real-world problem(s). Therefore, the major element of the case resides in the authenticity of the context where the problem is situated as well as the problem itself.

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Now what information we should put into the case, while writing the case the question of how to obtain the information should be considered, so many people are having the questionnaire whenever they visit to industries that may be an interview style may be, so they will take the interview or they will direct ask the question answer sessions.

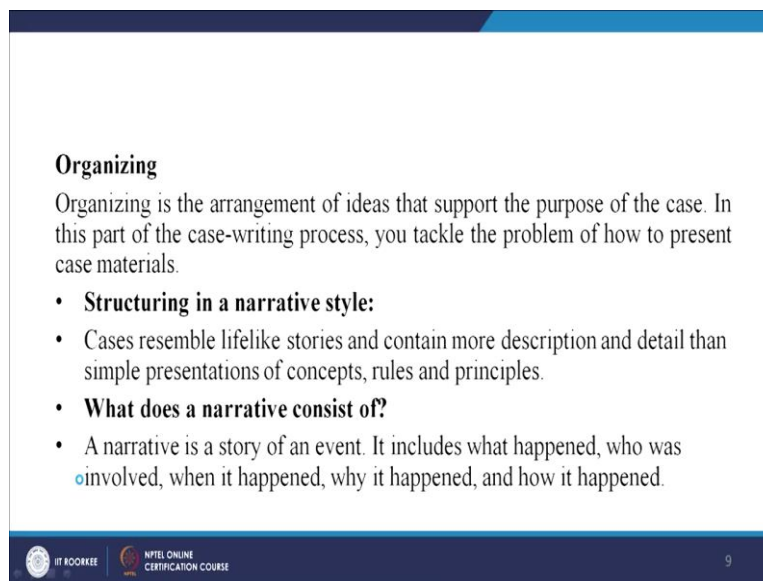
And then they get the early in your planning because the availability of information directly influences your choice and quality of content. So if the person has taken full interest the industry executive then he will share the supporting facts and figures and as a result of it, it will be directly influence the choice and quality of content. If the choice and the quality of content is there then definitely the readers they will find the value addition and the author that he will add the value in writing the content of the case.

Where is the source of materials? Every writing task requires research, after you identify the case issues you have to start looking for materials to make the case real and actual, the materials may come from different sources and the basic sources which normally I use in my case writing workshops and that is from the industry itself directly.

What makes a case? An effective case gives students a learning experience to engage real-world problems. As I mention that is they understand that is they understand that is the in the industry when they will go that what type of the problem already the industries are facing and what solutions they have provided.

Therefore, the major element of the case resides in the authenticity of the context where the problem is situated as well as the problem itself and therefore, in that case here the students, he learns that what is the problem and then what is the solution for that particular problem? This was all about the planning of the writing of the case study.

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Organizing

Organizing is the arrangement of ideas that support the purpose of the case. In this part of the case-writing process, you tackle the problem of how to present case materials.

- **Structuring in a narrative style:**
- Cases resemble lifelike stories and contain more description and detail than simple presentations of concepts, rules and principles.
- **What does a narrative consist of?**
- A narrative is a story of an event. It includes what happened, who was involved, when it happened, why it happened, and how it happened.

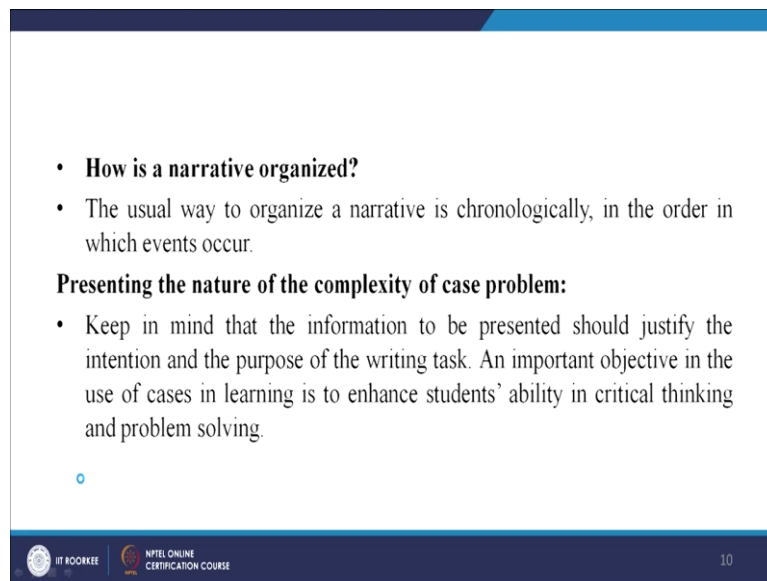
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Now we will go for the organising, organising is the arrangement of ideas that supports the purpose of the case and in this part of the case writing process, we tackle the problem of how to present case materials, the case materials are presented by the structuring in a narrative style. Cases resemble life like stories and contain more description and detail than simple presentations of the concepts, rules and principles.

This becomes very very important that is whatever the cases resembles life like stories are there they are more description and if more descriptions are there then detail simple presentations of the concepts that will be mentioned in the case study. So in structuring we have to talk about whatever more descriptions are there and detail than simple presentation of the concepts, rules and principles means that is if we are going that is the if there is an organization structure then just not only talk about the hierarchy, but giving the organization structure itself.

What does a narrative consist of? A narrative is a story of an event, it includes what happen? Who was involved? When it happened? Why it happened? And how it happened? And therefore, in that case we will talk about that is the whole story, it is not a story, story is fictitious whole event, activity that will be return that is how, when, where and why this particular event has occurred.

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- **How is a narrative organized?**
- The usual way to organize a narrative is chronologically, in the order in which events occur.

Presenting the nature of the complexity of case problem:

- Keep in mind that the information to be presented should justify the intention and the purpose of the writing task. An important objective in the use of cases in learning is to enhance students' ability in critical thinking and problem solving.

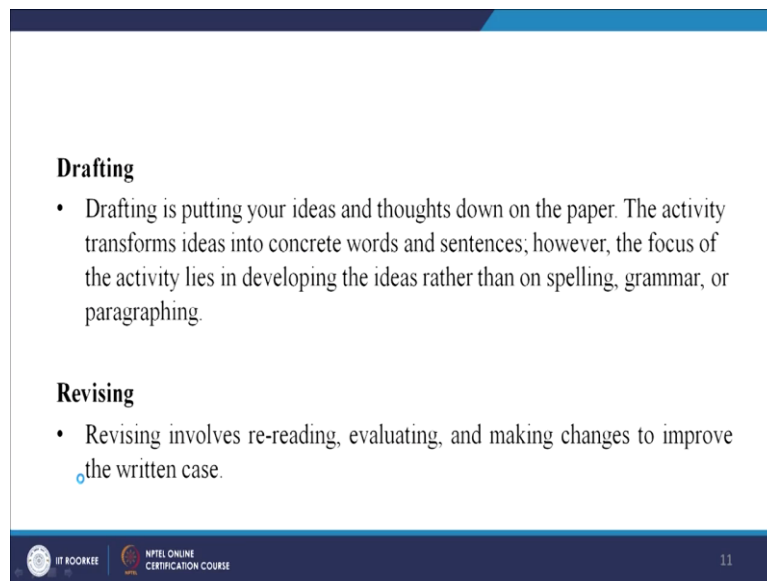
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How this narratives by the industry person that will be organized? The usual way to organise a narrative is chronologically in the sequence whatever first he says like in the first month this was happened, in the second month this was happened and after 3 months this was the issue then wage agreement was there, then after wage agreement there was a problem, so like this chronological order has to be followed, it should not be random. In the order in which the events occur and not randomly,

Presenting the nature of the complexity of the case problem keep in mind that the information to be presented should justify the intention and the purpose of the writing task that why we are writing because that will create a thought process in the readers mind.

An important objective in the uses of cases in learning is to enhance student's ability in critical thinking. As I mentioned that is the as we will read keep on going reading this particular case study then his thought process will also simultaneously work and his ability in critical thinking and problem solving that should be enhanced. So therefore, when there will be a situation that the problem is occurred then what to do? So that what to do question that will make the critical thinking enhancement of the student.

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Drafting

- Drafting is putting your ideas and thoughts down on the paper. The activity transforms ideas into concrete words and sentences; however, the focus of the activity lies in developing the ideas rather than on spelling, grammar, or paragraphing.

Revising

- Revising involves re-reading, evaluating, and making changes to improve the written case.

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Now, after organising we will talk about drafting that is the writing of the case study. Drafting is putting our ideas and thoughts on the paper, the activity transforms ideas into concrete words and sentences. However, the focus of the activity lies in developing the ideas rather than on spelling, grammar or the paragraphing is there.

So therefore, that main crux of the case study that should not be overlooked that has to be there in the case irrespective of that is these activity, the focus is that is the on these spelling, grammar and paragraphing, but most important point is content. While drafting that particular case study then transform ideas into concrete words and sentences that should be the, we should be able, the author should be able to putting his ideas and thoughts down on the paper and that is most important part is there.

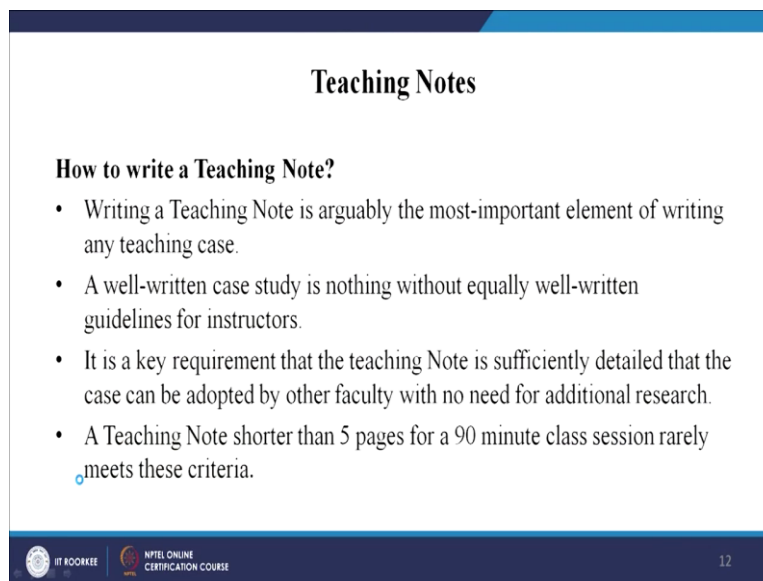
And once he has written the whole case study then he will be having the revising of the case study, revising involves the rereading, evaluating and making changes to improve the written case. So if anything any gap is there, there is no continuity then in that case it will be seen that is the person is able to develop that particular continuity, he will be able to bridge those gaps, he will be able to make those changes so that the case becomes the complete case and if the case is complete then definitely they will make, they improve the written case study.

So on the basis of this that is the planning and organising and drafting and revising the complete case study will be written and this case study will be given to the students, students will go through the case study, they will make the analysis of the case study and on basis of that that they will give their suggestions, they will give their recommendations and now what

is a role of a teacher who is invariably maybe many a times may be the author of that particular case study.

So case study is written with not only whatever the event has occurred and narrating a particle event, writing that event like a story and then finishing it, but that academic purpose is not complete, so what is write that is the write the teaching notes also along with the case study.

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Teaching Notes

How to write a Teaching Note?

- Writing a Teaching Note is arguably the most-important element of writing any teaching case.
- A well-written case study is nothing without equally well-written guidelines for instructors.
- It is a key requirement that the teaching Note is sufficiently detailed that the case can be adopted by other faculty with no need for additional research.
- A Teaching Note shorter than 5 pages for a 90 minute class session rarely meets these criteria.

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How to write teaching notes along with the case study? Writing a teaching note is arguably the most important element of the writing any teaching case. A well-written case study is nothing without equally well-written guidance for the instructors that is how he has to use a particular case study. It is a key requirement that the teaching note is sufficiently detailed that the case can be adopted by other faculty with no need for additional research.

So this teaching notes are they should have the sufficient details. So therefore, if somebody else is using that particular study so therefore, further he need not do any particular research and with the help of teaching notes he will understand and will be able to teach that particular case study. A teaching note shorter than 5 pages for a 90 minute class session rarely meets these criteria.

So therefore, if the session is for the 90 minutes and then definitely the discussion, the case is given, they come with the case and the case has been discussed and then the helping hand as a teaching notes there should be at least 5 pages, so these notes are taken from the Howard business school.

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What should be included in a good Teaching Note?

- ▶ **Case synopsis** – a very brief description of the case setting and key issues
- ▶ **Target audience** – courses in which the case can be used, level of difficulty, and specific prerequisites (what are the students assumed to master before the case is taught – for example a specific model that they will apply)
 - ▶ If multiple target audiences, discuss different teaching strategies

Clear learning objectives

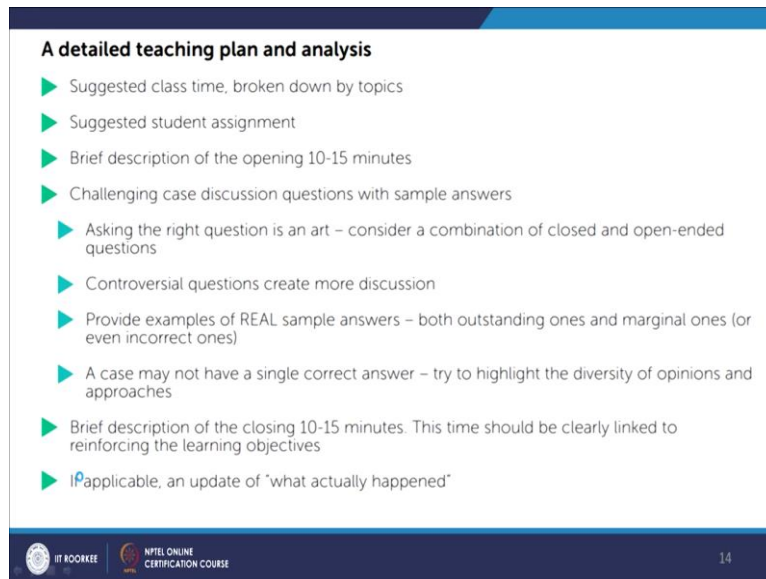
- ▶ Minimum one for a short mini-case to 3-4 for a longer case
- ▶ Should be as specific as possible
- ▶ Explain why they are important and relevant for the course you are teaching

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So what should be included in a good teaching note? So case synopsis is to be there, a very brief description of the case setting and the key issues are there then the target audience that is the courses in which the case can be used, level of difficulty and specific prerequisites what are the students assumed to master before the case is taught. For example, that particular concept, the theoretical concept they should know. For example a specific model that may be apply, so therefore, when we are writing that case study they should be able to connect that the study with that particular model.

If multiple target audiences are there discuss different teachings strategies and with different teaching strategies they can adopt those particular teaching notes. Clear learning objectives are there minimum 1 for a short mini case to 3 to 4 for a longer case that can be clear objectives should be as specific objectives as possible. Explain why they are important and relevant for the course that we are teaching.

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A detailed teaching plan and analysis

- ▶ Suggested class time, broken down by topics
- ▶ Suggested student assignment
- ▶ Brief description of the opening 10-15 minutes
- ▶ Challenging case discussion questions with sample answers
 - ▶ Asking the right question is an art – consider a combination of closed and open-ended questions
 - ▶ Controversial questions create more discussion
 - ▶ Provide examples of REAL sample answers – both outstanding ones and marginal ones (or even incorrect ones)
 - ▶ A case may not have a single correct answer – try to highlight the diversity of opinions and approaches
- ▶ Brief description of the closing 10-15 minutes. This time should be clearly linked to reinforcing the learning objectives
- ▶ If applicable, an update of “what actually happened”

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On basis of that a detailed teaching plan and analysis can be made, the class timing, then how much time we will give for the case discussion, then what will be the presentation and then how that presentation will be concluded. Brief discussion of the closing 10 to 15 minutes will be there and that is clearly linked to reinforce the learning objectives, then there can be controversial questions also, then provide the real sample and examples and if applicable in update of what actually happened that is very important.

Now, discussion is done but what actually happened because it is the author knows that is the what has happened in that particular problem, he might have ended the case study with the questions, but he knows the answer and in the teaching notes that can be there.

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Typical mistakes (and reasons we ask you to revise and resubmit)

- ▶ **1.** Case study is written as a research article rather than a case. There is no real case protagonist (having a real person as a decision-maker is not an absolute requirement but often highly recommended)
- ▶ **2.** The Teaching Note is too superficial – teaching the case requires additional information, which in reality means it can only be taught by the case writer.
 - ▶ A typical mistake is to ask students to make specific recommendations about future actions without providing sample answers (this makes it very difficult for faculty to adopt the case unless they have special insights into the company)
 - ▶ Another typical mistake is to suggest a 90-minute teaching plan supported by a one-page Teaching Note
- ▶ **3.** There is a mismatch between the Teaching Note and the case – the suggested answers are not supported by the case (impossible for the students to do), or alternatively they are straightforward “copy-paste” from the case (too easy). Try to get a good balance, allowing students an opportunity to add value by their analysis without making the task impossible
- ▶ **4.** Learning objectives – applying a model without a purpose. For example, “the students will apply the XX model to the situation” is not a good learning objective, while “the students will apply the XX model to the situation in order to make a specific recommendation” is a good learning objective. However, the Teaching note must discuss the recommendations and the link between the model and the outcomes
- ▶ **5.** Submitting a case that has never been taught in class. Teaching a case a few times allows you to refine and debug it, and to use the class discussion as a basis for the Teaching Note

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We have to make wide the typical mistakes that is as a research article rather than a case that should be avoided, the teaching note is too superficial, there is a mismatch between the teaching note and the case that should not, it should never happen because notes of that particular case study, learning objectives are there, model without a purpose then that will not help, so there should be model related to that particular case study, student should be able to link that is this was the model and this is the case study, may be example of the any stress management, or change management or conflict management, emotional intelligence whatever is the message is there, the theme is there of that particular case study.

Submitting a case that has never been taught in the class, teaching a case a few time allows you to define and debug it and to use the class discussion, so therefore, make the use 4 - 5 times at a particular case study and then naturally the comments will be there and then on basis of that we can summarise that case and we can make a perfect case. So I wish that is the trainer will make their own case studies, they will exercise in the classroom and use into their training programs. Thank you.