**AUTHOR NAME(S) (Calibri, Font size 9, Bold, UPPERCASE)**

**(Calibri, Font size 14, Bold, UPPER CASE)**

**CASE TITLE**

Opening Quotation Style – This is the style used for quotations that open a case or begin a new section. Calibri, font size 10. The paragraph is indented by 0.2 inches on both sides and justified. Do not place quotation marks around the text.

—Opening Quotation Citation Style – This is the style used for the citation immediately following an opening quotation. Use an em dash symbol (copy/paste it into your document or insert it by going to the Insert menu, selecting symbol, and choosing the em dash) followed by the Name, Designation, and Organization of the person quoted. Calibri, font size 9, not italicized, Justified. The paragraph is indented 1.0 inch from the left and 0.5 inches from the right. If the citation extends beyond the first line, align the text to the left with the em dash, as shown here.

Throughout the body of the document, use the Body Text Style (Calibri, font size 10, Justified). Leave a single line blank before and after each paragraph to separate the text. All paragraphs are single-spaced, with no indenting.

**HEADING 1 STYLE (CALIBRI, FONT SIZE 12, BOLD, UPPERCASE, ALIGNED LEFT)**

This is an example of paragraph text following Heading 1. Heading 1 is used to introduce the primary sections of the document. Leave a blank line before and after Heading 1.

**Heading 2 Style (Calibri, Font Size 12, Bold, Aligned Left)**

This is an example of paragraph text following Heading 2. Heading 2 is used to introduce the sub-sections beneath Heading 1. Leave a blank line before and after Heading 2 and capitalize each word in the heading.

***Heading 3 style (Calibri, font size 12, bold, italics, aligned left)***

This is an example of paragraph text following Heading 3. Do not leave a blank line between Heading 3 and the paragraph text. Heading 3 is used to introduce the sub-sections beneath Heading 2. If a longer, more descriptive title is used to introduce a section at the third level, only the first word in the heading should be capitalized (at the discretion of the author).

**HEADERS, FOOTERS, AND FOOTNOTES**

The standard Footer for page 1 is shown at the bottom of the previous page. It comes up automatically when you use the electronic case template. Go to the View menu; choose Header and Footer, and then move down to the footer to insert the names of the case writer and professor.

The standard Header for page 2 and beyond is shown above. Go to View, Header, and Footer to insert the case title and number. Below is an example of a footnote.[[1]](#footnote-1)

Footnotes are preferred to endnotes (although, endnotes can be used at the discretion of the case writer).

**QUOTATIONS AND BULLETS IN THE BODY OF THE DOCUMENT**

When using a quotation in the body of the document that is more than five lines in length, the quotation should be set apart from the rest of the document text. Introduce the quotation and/or author with a lead-in sentence followed by a colon (e.g., XYZ claimed/In the words of ABC):

Body Quotation Style – This is the style used for the quotation itself. Calibri, font size 10, Justified. The paragraph is indented 0.2 inches on both sides. Do not place quotation marks around the text. A footnote should be included at the end of the quotation to cite the source.[[2]](#footnote-2)

Leave a blank line before and after an indented quotation.

Quotations that are less than 5 lines can be used as part of the content body, and in such cases, keep the quotes within quotation marks.

If the case contains quotations from interviews conducted by the case author, after the first such quotation, include a footnote as shown below.[[3]](#footnote-3)

Use bullets to enumerate points in place of numbers or dashes. When a general statement applies to several bulleted points, introduce the bulleted list followed by a colon:

* End each bulleted point with a period if it forms a complete sentence, either by itself or in combination with the initial statement.
* End each bulleted point without a period if it is a word or phrase.
* Use solid black bullets.
* Do not indent the list.

Leave a blank line before and after a bulleted list.

**OTHER FORMATTING INFORMATION**

At the end of a section, do not leave more than one blank line between the last paragraph and the heading that introduces the next section.

Avoid leaving a heading at the bottom of the page with the section it introduces beginning on the next page. Margins in the case document should remain set to Top 0.8 inches, Bottom 0.8 inches, Left 1.0 inch, and Right 1.0 inch. Leave Headers and Footers at 0.5 inches.

**WORKING WITH THE CASE TEMPLATE**

To begin a case, launch the Case Template, go to the File menu, and choose Save As. In the File Name field, rename the document (see below). In the Save As Type field, choose Word Document (instead of Document Template).

Whenever possible, apply the defined styles to your case document rather than manually changing the font, alignment, and other formatting options. By using the defined styles, you will help us achieve greater consistency across all IIMB cases and you will be able to modify your document more efficiently.

**FILE NAMING CONVENTIONS**

Case studies should be named using the Case Writing Office’s standard file naming convention. Each file should include the case number, title of the case, and version date (with a blank space between each one) as follows:

* SM-133 New Venture Development at Intel 121504
* IB-58 The Competitive Advantage of India 100504

The complete title of the case should be used because there can be multiple cases written about a single entity. However, if the case title is particularly lengthy, it can be abbreviated at the discretion of the author.

During the case development process, additional notations can be added to the file naming convention to help with version control (e.g., SM-133 New Venture Development at Intel v1121504). However, when the document is submitted for publication, the file name should read as listed above.

The file naming convention differs slightly for teaching note documents and abstract and information forms, as shown below:

* SM-133 New Venture Development at Intel TN 121504
* IB-58 The Competitive Advantage of India A&I 100504

**FIGURES**

Central align the figures and provide a title (see sample below). Figure number and name should be described below the figure. Single spacing between the figure and the figure name.

**Figure 1**

**Sample Figure (Calibri, Font size 12, Bold)**



Figure Number

Figure Name

**Source**: Please provide the source details for the figure. If the source contains an online reference link, it must be followed by the date of last access. Use American style for dates­—month, day, year (e.g., November 6, 2021).

**TABLES WITH BORDER**

Align numbers to right and normal text to left. Do not leave more than one line of gap between the table and the source below the table. Keep one line gap between the text above and below the table.

|  |
| --- |
| **Table heading (Calibri, Font size 10, Bold, Background color Gray)** |
| **Heading 1****(Calibri, Font size 10, Bold, Center Aligned)** | **Heading 2** | **Heading 3** | **Heading 4** | **Heading 5** | **Heading 6** |
| Content 1(Calibri, Font size 10) | 123 | 789.22 | 23.55 | 4564564 | 5454 |
| Content 2 | 987987 | 21131 | 8789 | 4564.23 | 45258.22 |
| Content 3 | Text 1 | Text 2 | Text 3 | Text 4 | Text 5 |
| Content 4 | Text 6 | Text 7 | Text 8 | Text 9 | Text 10 |

**Source:** <Source name> (Calibri, Font size 8)

**TABLES WITHOUT BORDER**

|  |  |  |  |
| --- | --- | --- | --- |
| **Item (Calibri, Font size 10, Bold, Right aligned)** | **2005** | **2010** | **2015** |
| **Total Demand (Thousands of Tons)** |  |  |  |
| Low | 2.19 | 2.56 | 2.36 |
| High | 2.56 | 8.26 | 3.12 |
| **Average Annual Growth Rate (%)**  |  |  |  |
| Low | 4.25 | 2.55 | 2.54 |
| High | 2.56 | 1.22 | 2.11 |

**Source:** <Source name> (Calibri, Font size 8)**Exhibit 1**

Descriptive Title 1995-2000 (Calibri, font size 12, bold, centered)

Introduce an exhibit using the Exhibit Title Style, as shown above.

Always insert a page break between the first exhibit and the body of the document. More than one exhibit may be placed on a page, as long as the information does not appear too crowded on the page.

Be sure to place a reference for each exhibit in the body of the document. Insert the reference in the text where the exhibit is most relevant. Add the exhibit number in parentheses and in bold at the end of the sentence before the closing punctuation, as shown here (**Exhibit 1**).

Whenever possible, keep exhibits to one page in length. However, if an exhibit requires multiple pages, a title at the top of subsequent pages should be included as shown below.

Exhibit 1 (Continued)

Descriptive Title 1995-2000

Exhibits should use portrait page orientation whenever possible.

For the body of an exhibit, use the Body Text Style. Calibri, font size 10, Justified.

Always include a citation for the data provided in each exhibit using the Exhibit Citation Style (Calibri, font size 8; several examples are shown below). See the Case Writing Office’s Formatting Guide for more information about what to include in citations for exhibits.

When copyright permission is required (and has been obtained):

**Source:** *<Company name>® Overview*, <Mon> <DD>, <YYYY>.  Copyright © <Company>. All rights reserved. Reprinted by permission of <Company>. (Calibri, font size 8, italics, Justified)

When data has been compiled from multiple sources:

**Source:** Compiled from <Source name1> (<Month> <YYYY>), <Source name2> (<Month> <YYYY>), and data provided by <Source name3>.

When data has been provided directly by a company or other organization:

**Source:** Photographs provided by <Company name>

1. Footnotes should appear in Calibri, font size 8. If the footnote contains an online reference link, it must be followed by the date of last access. Use American style for dates­—month, day, year (e.g., November 6, 2021). [↑](#footnote-ref-1)
2. See the Case Writing Office’s Formatting Guide for more information about what to include in footnotes. [↑](#footnote-ref-2)
3. Interview with <name of the person>, <MON>, <YYYY>. Subsequent quotations are from the author’s interviews unless otherwise noted. [↑](#footnote-ref-3)