



HBPE Case Submission Guidelines

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General Guidance for Cases to be Submitted to HBPE

- Cases should be at least four pages and maximum 15 pages, including exhibits.
- Anyone (eg. an employee, a board member) from the organization, about which the case is being written cannot be a co- author. HBPE believes this to be necessary to avoid conflict of interest and achieve some objective distance.
- Cases written from primary research should be accompanied by a “clearance / approval letter” from the organization for publication
- Cases can be written purely from secondary sources, i.e., without directly collecting any data from the organization in question.
- **There needs to be a creditable teaching note for every case we make available.** (Many customers will not even examine a case that lacks a teaching note.) At a minimum, a creditable teaching note establishes specific learning objectives, guides a prospective adopter through all stages of a class session (in part by providing a set of questions for the instructor to explore in class), and thoroughly analyzes all the salient issues – including quantitative challenges – in the case. **A creditable teaching note is not a skeleton outline with a few questions and/or bullet points.**
- All cases should be accompanied by a Turnitin report to ensure that there is no copyright violation

Style Guide

Harvard Business Publishing - Education (HBPE) has provided a style guide in hardcopy for Case writers and Editors (July 2007 version). Please write to CTL Support and we will loan you a hard copy of the style guide. If you find that you don't have time to go through all its 138 pages, keep these key guidelines in mind as you document your case and the copywriters will handle the rest.

Key Guidelines for Case writers

1. **Write in the past tense.** HBP cases are likely to be read for many years after they are written. Therefore, it is important that they portray facts of 'truth' in a way that remains constant. Of course, there are facts that are unlikely to change during the lifetime of a case. For instance, if you were to describe a new cardiac medical device you might be tempted to say, “The heart pumps 16 pints of blood through the body's circulatory system”. However, if you decide to write 'immutable truths' in the present tense you will constantly find yourself having to gauge whether a fact will always stay true or someday be subject to change. Since, in the example above, 'pumped' works just as well as 'pumps', writing in the past tense can save you the trouble of having to draw these distinctions more times than necessary.

The present tense may be used for the following items

- Appendixes
- Biographies (in exhibits)
- Quotations. Cases are often designed to present a protagonist pondering a decision

or problem at a moment in time. Thus, it's natural to relate this person's words as they were captured in real time. Example: "We need to improve the quality of the product we produce at our Thane plant."

- Teaching notes. Cases are written in the *past tense* because they are meant to capture a moment in time. Teaching notes are written in the *present tense* because they describe a teaching process that is current and ongoing.
2. **Refer to the character in a case by last name.** When introduced for the first time, use a character's full name. For every subsequent mention the character can be referred to by his or her last name alone.
 3. **Maintain a neutral, non-judgmental tone.** Prevent a case from sounding like a public-relations piece or a critique: if you feel you need to convey a point of view, find a source and attribute it to others. For example, it would be preferable to say "Industry analysts were enthusiastic about the company's growth prospects." rather than the same thing from your perspective.
 4. **Eliminate bias.** Avoid terms that may show any bias toward gender, race, age, sexual orientation, religion—or any other category.
 5. **Use gender-neutral language.** Use non-sexist language. When not referring to a specific person, avoid habitually using he or she. Instead try using the plural form. For example, say "Economists are not perfect; they cannot predict the future", instead of "The economist is not perfect...". When pluralization becomes awkward, use the combination "he or she" ("him or her", or "his or hers") though sparingly. Avoid using "s/he".
 6. **Use the active voice.** Verbs are either active or passive, and HBS prefers that writers use the active voice. "The management made mistakes" sounds stronger and is, therefore, preferable to: "Mistakes were made by the management". Sometimes the passive voice is justifiable when the person performing the action is unknown or difficult to identify. A good example is: "The cargo was damaged during the trans-Atlantic flight".
 7. **Avoid jargon, technical terms, and clichés.** Try to use words that will be understood by all readers.
 8. **Use exhibits to amplify the points you are trying to make.** Exhibits often account for roughly half of the pages in a case. The data you include depends on the teaching objectives of a case. If you decide to include certain data, you also need to decide how raw or synthesized it should be. Keep in mind: raw data requires more student analysis and synthesized data can clarify a point.
 9. **Refer to all exhibits** within the body of the case and include a brief explanation of each exhibit. For example:

Acme continued to perform poorly (see **Exhibit 2** for summary income statements...)

The explanation helps readers quickly identify the purpose of the exhibit, figure, or table. The bold type provides a visual cue for readers who might be skimming a case. Always use initial caps and boldface for the words **Exhibit**, **Figure** or **Table** and the associated number.
 10. **Provide citations for all source materials, including direct quotations, paraphrased factual statements, and borrowed ideas.**

11. **Use the IIMB-HBPE case template to be sure you adhere to formatting standards.** This is available in Venus, in the R&P section as well as in the Resource section of the CTL website.
12. **Use American spelling and punctuation.**
13. **Usage of currency for monetary figures.** Since our cases cater to an international audience, please ensure that you provide the currency conversion rate with respect to the US Dollar as on date, as a footnote. Please ensure that you use the same unit of currency throughout the case as it makes it easier for readers to compare figures within the case.