

Guidelines for Writing Cases



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About IBS Case Research Center (IBS CRC)

IBS Case Research Center (IBS CRC) is a center of excellence at IBS Hyderabad, a constituent of IFHE (deemed-to-be-university). At IBS CRC, a dedicated and dynamic team works toward fulfilling the institution's mission of developing high quality case studies. The case studies are usually written by a team comprising Faculty members and Research Associates.

IBS CRC has emerged as one of the world's top 3 case publishing houses. Since 2011, the most successful winners in The Case Centre's prestigious Case Awards were Harvard Business School (with 31 awards), INSEAD (19) and ICFAI Business School (14). IBS cases have been taught in between 650 and 700 schools around the world, and in over 70 countries. Over 10 million copies of IBS cases have been printed in international and Indian textbooks and casebooks. IBS CRC has won more than 100 awards in several global case writing competitions.

In 2019, IBS CRC emerged as the most successful institute in terms of total number of worldwide bestsellers, next only to Harvard Business School. The Director of IBS CRC, Prof. (Dr.) Debapratim Purkayastha, was declared as the Number one bestselling author of Management case studies by The Case Centre in 2016, 2017, 2018, and 2019 in a list otherwise dominated by Harvard, INSEAD, and IMD professors.

Guidelines for Writing Cases

Some important points to note while writing case studies:

- The objective of the case study (i.e. what are the learning objective, what the case study will help teach) should be clear to the author. The case study should be structured in a way so that the objective could be achieved. The objective will also determine what information is to be included in the case and what to be left out.
- Though all case studies are not alike and structure may vary depending on the objective of the case study, whenever possible try to follow this structure: Introduction – background – Problem/Challenge – what the company did about it – Reactions/Results – The road ahead (that could include any other immediate issues to be addressed). The 'introduction' section will introduce the key aspects of the case including the immediate issues to be addressed (so it's better to write this section after the rest of the case study has been prepared).
- A case should include relevant factual information (facts and figures), and opinions (opinions to be attributed to analysts, experts, etc. as may be the case). The reader should not perceive that the author is endorsing or criticizing a particular decision/aspect of the company. Your own opinions, analyses, etc. are to be put only in the Teaching Note not in the case study.
- The language used should be straight forward (no flowery words or phrases... minimal use of superlatives... no ranting and raving).
- Slandorous and libelous statements should be avoided. If any such statements are very important to the objective of the case, the author may include it but s/he should ensure that the source is a good one and also cite it properly.
- No sentence or part of sentence should be copied directly from the source (unless when quoted). Everything should be rewritten. The author should also note that the structure and flow of the case should also not be similar to that of any article. Only the information should be taken from the source files, the language and flow of the case study should be that of the author.

- Wherever possible, adapt the figures and try to present data in a different way. This applies to Exhibits too.
- Pay attention to detail. Ensure that there is no mis-representation of data. Ensure that there are no spelling/grammatical errors and typos. In particular, pay close attention to spelling of proper nouns (names).
- Direct quotes from the various actors in the case study can be used at relevant places in the body of the text as these quotes liven up the script and also provide more credibility to the write-up.
- See that the case study is not one sided. A good case study should have multiple perspectives.
- Write the case in the past tense. Provide dates/periods liberally, avoid use of words such as 'recently', 'today', 'tomorrow', 'this month', 'last month', 'last year', 'next year', 'next five years', etc. This will ensure that your write-up is timeless and people using the case study even 5-10 years after the case is published can also relate to it.
- Avoid using units such as lacs, crores, etc. Use '000, millions and billions, etc. instead. For currency other than US\$, £, and €, the conversion value in US\$ should be provided. On the very first instance when you mention a different currency (e.g. Rs.) you should put a footnote such as: 'As of December 2008, US\$1 was approximately equal to Rs.49.30.'
- When referring to any organization for the first time, provide a footnote. The content of the footnote would depend on the context of the case. For instance, if you are referring to a JP Morgan analyst's comment on a company (say, WalMart), you may refer to JP Morgan just as a leading investment bank based in the US, but if it is a banking case featuring one of its competitors, a more elaborate footnote with financials, etc. may be necessary.
- When used for the first time, the full name of people, companies, etc. should be used. A shorter name can be put in parenthesis, and this can be used for the rest of the text. For example, Myron E Ullman III (Ullman), Ajim Hasham Premji (Premji), E. I. du Pont de Nemours and Company (DuPont), LVMH Moët Hennessy – Louis Vuitton S.A. (LVMH), Wal-Mart Stores, Inc. (Wal-Mart), etc.

- Citation should be provided whenever you are taking a direct quote, providing some key facts and figures, some key/controversial idea/opinion, etc. The citation should be like this – [name of the author], “[Title in sentence case],” [source/url], [Date]. E.g. 1. John Doe, “This is How to Cite,” www.citing.com, December 2, 2008. E.g. 2. John Doe and Richard Smith, “More about How to Cite,” Indian Research Journal, December 2, 2008.
- In case of Books, the citation may be like this: [name of the author], [Title in sentence case], ([Publisher], [Date/Year of Publication]). E.g. H Craig Petersen and W Cris Lewis, Managerial Economics, (Pearson Education, 2001).
- The default font should be Times New Roman 11.

Characteristics of a good case study:

- Ability to satisfy the educational objectives and student expectations
- Relevance of topic
- Multiple perspectives
- The ability to take a critical view
- The correctness of the research and data
- The manner of presentation of the data
- Writing style – story that catches attention
- The useful life of the case, versatility of usage
- The abstract (very important for marketing)

A good teaching note includes the following:

- Immediate issues, basic issues and key points or highlights
- Indications of level of analysis (i.e. for whom is it meant... graduates, undergrads, executives, etc.)
- Potential uses of the case (marketing, strategy, etc.)
- Suggested teaching approach
- Proposed session plan
- Suggested student assignment
- Suggested additional readings or references
- Possible discussion questions
- Analysis

Style Guidelines to note while writing case studies:

- The font & size for **Title of the Case Study** should be Times New Roman 18 Bold. (Title Case)
- The font & size for *Introduction Quotes* should be Times New Roman 11 Italics.
- The font & size for **Author of the quote and Month & Year** should be Times New Roman 11 Bold (Right alignment).
- The font & size for **SECTION HEADINGS** should be Times New Roman 12 Bold. (Upper/Capital Case – All should be in capitals)
- The default font for text content/body should be Times New Roman 11 (Justified alignment).
- The font & size for **Table No., Exhibit No., Box No., Figure No. and Annexure No.** should be Times New Roman 11 Bold. (Centre alignment)
- The font & size for **Table Title, Exhibit Title, Box Title, Figure Title and Annexure Title** should be Times New Roman 12 Bold. (Centre alignment and Title Case)
- The default font for content/body of Exhibit, Box, Table and Figure should be Times New Roman 11 (Justified alignment).
- The font & size for *Table, Exhibit, Box, Figure and Annexure Source* should be Times New Roman 10 Italics. (Should be given below the Table box)
- The font & size for footnotes should be Times New Roman 10.
- All the Exhibits should be at the end of the case, should have Exhibit Number, followed by Title, followed by body/content and followed by source.
- The default font should be Times New Roman 11.
- References and Suggested Readings – Should be given in Reverse Chronological order; **Titles** should be in Bold; the font and size should be Times New Roman 11 (Justified alignment).
- All the exhibits and Figures should be connected to the text as below: *(Refer to Exhibit I for a picture of the Maruti “Kitna Deta Hai” Campaign)* – Should be given within brackets and font should be Times New Roman 11 Italics.