

## Best Practices and Preferred Style for Case Study Development

### Content Development

- Organize the case content in a manner that is intuitive to the presentation of information. For example, present the information chronologically, present background information before in-depth analysis of a topic, etc.
- Include time frames of when data was relevant. For example, “Project XYZ cost Company ABC USD \$55,000 *in 2023*.”
- If necessary, include currency conversion rates to make all monetary figures in USD. Use relevant exchange rates and cite the source of the exchange rate. For example, to convert currency references (within a 2021 Russian Annual Report) from rubles into USD, use a conversion rate from 2021.
- Cases should be written in *past tense and third-person*, except for direct quotes and information in exhibits and appendices.

### Dilemma and Protagonist Development

- The case must have a clear dilemma point that includes specific questions students will answer through case analysis.
- Avoid using a dilemma point that encourages single solution perspectives. A strong dilemma point allows multiple solutions to be developed by students based on their individual experiences, knowledge, and perspectives.
- The protagonist is the person tasked with making the decisions in the case.
  - The protagonist can be a real or fictitious person. However, note that using a real protagonist (if possible) increases the relevancy and credibility of the case.
  - If a protagonist is a real person (i.e., company executive), but no interview with the company was conducted, develop a storyline that can be reinforced with secondary research data.
  - If a protagonist is a real person, and you conducted interviews with this person and others at the organization, be sure to cite the “interview information” in MLA style. (See “Sourcing Content and Citation Style” section of this document.)
  - If a protagonist is a fictional person, acknowledge this with a footnote, i.e., “Bill Smith is a fictional character.”

### Paraphrase vs. Direct Quotes

- When incorporating content requiring citation, either paraphrase or directly quote the source.
  - Paraphrase: The writer reviews the original source content, rephrases it, and cites the original source.
  - Direct Quote: The writer uses a verbatim version of the source material, places the text in quotation marks, and cites the original source.

## **Best Practices and Preferred Style for Case Study Development**

(cont.)

### **Sourcing Content and Citation Style**

- When conducting research for a case, keep a record of any sources accessed, along with the specific information gathered from each source. Remember that any online sources must include the URL, as well as the date it was accessed.
- Endnotes:
  - A complete list of all source information – in MLA style – should fall at the end of the document. Citations within the text should be designated with superscript Arabic numbers that refer to the same number at the end of the document.
  - Use the automated ‘endnotes’ feature in Microsoft Word and set to ‘MLA style’, as well as the parameters listed above. Here is a good resource:  
<https://www.howtogeek.com/359187/how-to-use-footnotes-and-endnotes-in-microsoft-word/>
  - Refer to the following resource for how to format your endnotes in MLA style:  
[https://owl.purdue.edu/owl/research\\_and\\_citation/mla\\_style/mla\\_style\\_introduction.html](https://owl.purdue.edu/owl/research_and_citation/mla_style/mla_style_introduction.html)
- Footnotes:
  - Footnotes within the text should be designated with consecutive, superscript Roman numerals that refer to the same Roman numeral at the bottom of the page where it is referenced.
  - Use the automated ‘footnotes’ feature in Microsoft Word and set the above parameters. Here is a good resource: <https://www.howtogeek.com/359187/how-to-use-footnotes-and-endnotes-in-microsoft-word/>
- The difference between footnotes and endnotes:
  - Footnotes appear at the bottom of a page and are used to simplify or add more detailed information to a portion of text mentioned on that page.
  - Endnotes appear at the end of a document and give detailed information about external sources used in creating the document’s content.

### **Graphics**

- WDI Publishing generally publishes three types of graphics:
  - Tables
  - Exhibits (graphics included in-text that are less than a half-page in length)
  - Appendices (included after the text, before the endnotes).
- All tables, exhibits, and appendices must include the following:
  - Reference number or letter (i.e., Table 1, Exhibit 1, Appendix A)
  - Title (For example, “ACME Corporation 2018–2023 Financials”)
  - Source line below the graphic. (Do not use endnotes to cite a table, exhibit, or appendix.)

## **Best Practices and Preferred Style for Case Study Development** (cont.)

### **Graphics** (cont.)

- All graphics must be referenced within the body of the text. For example, “The company lost \$20 million in revenue since 2017 (**see Exhibit 1**).”
- Embed all graphics directly into the Microsoft Word document (exactly where you want them to appear). You may need to provide some graphics as individual files, upon request.