The Craft and Focus of Case Writing

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Abstract

This paper introduces CASECRAFT, a framework for case writing, and FOCUS, a guide to structuring decision narratives. Case method literature and the principle of constructive alignment inform both. Examples from published cases illustrate choices about scope, evidence, narrative and teaching notes. The paper also considers permissions, disguise, responsible use of AI and classroom testing. Its contribution is to treat teaching-note alignment as a thread running through the whole development process rather than a final step, offering first-time writers a structured route from organisational reality to classroom learning.

Keywords: CASECRAFT, case writing, FOCUS, management education, teaching notes

1. Begin with learning, not with a company

A new case writer often begins with an interesting organisation, a successful executive or an unusual event. These are promising leads, but they are not yet teaching cases. The more useful starting question is what students will be able to do after working through the situation that they could not do as well before. A case about a manufacturing company, for instance, may be used to examine reward fairness, operational capacity or family governance. Each purpose requires a different selection of facts and a different narrative.

A decision case places learners in the position of someone who must exercise judgement under constraints. They must interpret evidence, distinguish symptoms from causes, weigh alternatives and defend a course of action. A descriptive case may instead help learners explain an event or compare practices; an exercise case may develop a particular analytical technique. The emphasis in this paper is on decision cases, although much of the development process applies to other forms. Other types include situation cases (diagnosing events), incident cases (illustrating an issue) and background cases (providing context). Any of these case types may vary in complexity. Mini and video cases are formats rather than separate pedagogical purposes.

A teaching case differs from a research case study in its primary purpose. Research normally seeks to answer a research question and establish findings; a teaching case creates material through which students undertake analysis themselves. Both require credible evidence. The teaching case, however, is usually accompanied by a separate teaching note (TN), where the author explains the pedagogical purpose, theoretical analysis and suggested classroom approach (Sipior et al., 2021).

Case writing can also be a valuable form of faculty development. Interviews bring academics into contact with emerging professional problems and expose the limits of textbook prescriptions. Locally grounded cases can help learners examine institutional constraints, employment practices and managerial choices without assuming that imported examples transfer unchanged. Local relevance does not mean abandoning theory; it

means making theory answerable to context. The examples in this paper draw largely on cases I have contextually developed, individually or with colleagues, on organisations facing challenges in human resource management, strategy and family business.

CASECRAFT guides the development of a case and its teaching note; FOCUS guides the construction of the decision narrative. Their value lies in linking the work of the writer to the work expected of the learner.

2. CASECRAFT: from idea to classroom

The CASECRAFT framework, developed in this paper, organises nine stages into two phases: CASE (design and research) and CRAFT (development and validation). It builds on the practical tradition of Ivey case writing, notably its emphasis on case origin, the case plan, decision boundaries, release and classroom testing (Leenders et al., 2001). The nine stages distinguish gaining access from gathering evidence, drafting from refinement, and authorisation from classroom testing. These distinctions matter because each requires a different kind of judgement and produces a different output. The framework brings together three responsibilities: establishing a credible account of organisational reality, constructing a narrative that requires managerial judgement, and designing a learning experience that another instructor can facilitate.

Table 1. CASECRAFT stages and outputs

Stage	Main task	Expected output
C — Conceptualise	Identify opportunity, learning purpose and audience.	Case concept
A — Access	Arrange legitimate access, permission and consent.	Access arrangements
S — Scope	Set protagonist, dilemma, trigger and boundaries.	Case plan
E — Explore	Collect and verify relevant evidence and perspectives.	Evidence base
C — Construct	Outline and draft using FOCUS; integrate exhibits.	Case draft
R — Refine	Check accuracy, balance, clarity and analytical depth.	Edited draft
A — Align	Develop the teaching note alongside the case.	Aligned teaching note
F — Finalise	Prepare materials and secure required release.	Cleared case package
T — Test	Pilot, assess, revise and obtain re-release as needed.	Refined case package

Although presented in stages, case development is iterative. An interview may prompt a new decision focus; a draft teaching question may reveal a missing exhibit. Pedagogical alignment begins during conceptualisation and continues throughout development. Ethical integrity, evidential rigour and pedagogical relevance apply throughout. Access, scoping and evidence collection often proceed together, as preliminary conversations reveal what can be investigated and what is worth teaching.

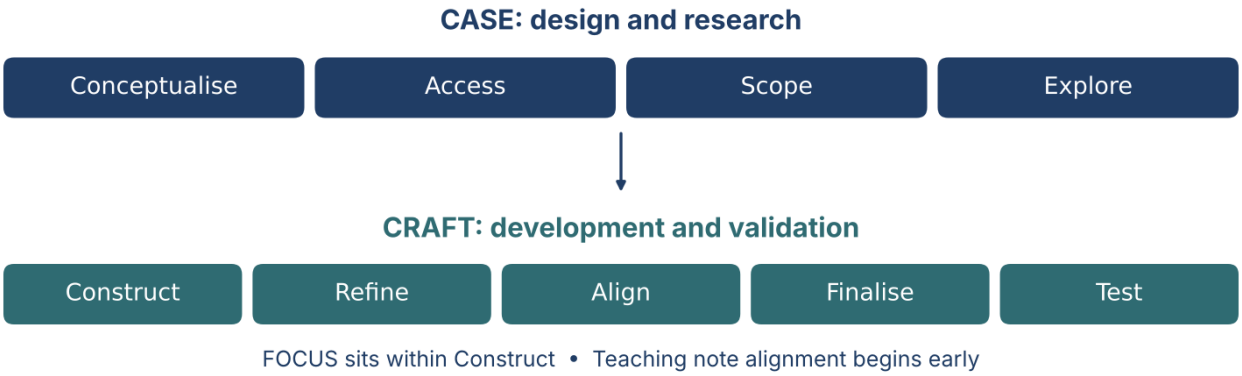
The design draws on two complementary strands of literature. Kim et al. (2006) identified five attributes of useful cases: relevance, realism, engagement, challenge and instructional value. In CASECRAFT, relevance comes from the learning purpose and scope; realism from credible evidence; engagement from the narrative; challenge from the decision and its constraints; and instructional value from alignment and classroom testing. Biggs (1996) argued for constructive alignment between intended outcomes, learning activities and assessment. Together these ideas support a process in which the learning purpose shapes the evidence, narrative and teaching plan. The practical guidance of Ivey Publishing (n.d.) and HEC Montréal (n.d.) also treats case writing as a process extending beyond the initial draft.

Several established guides describe the case writing process in detail, including Leenders et al. (2001), Naumes and Naumes (2012), Vega (2022) and Sipior et al. (2021). CASECRAFT is intended to complement

rather than replace them. It separates activities that call for different judgements, such as gaining access and gathering evidence, or obtaining release and testing in class, and it makes teaching-note alignment a continuous thread rather than a final task. FOCUS adds a narrative template that links the case funnel to the learning objectives.

The following mapping illustrates how the case writing activities described by Leenders et al. (2001) can be organised within CASECRAFT: Conceptualise (origin and lead); Access (initial contact and provisional release); Scope (focus and plan); Explore (data collection); Construct (rough draft); Refine (editing and revisions); Align (preliminary and full TN); Finalise (release); Test (class test and re-release where required).

Figure 1. CASECRAFT stages, with FOCUS embedded within Construct



3. CASE: design and research

CASE comprises four stages: Conceptualise, Access, Scope and Explore.

Conceptualise the opportunity

Look for turning points rather than impressive institutions. Useful leads include former students, alumni, professional networks, public reports and conversations with managers. A failed initiative may be as useful as a successful one. Before arranging a lengthy interview, prepare a short concept note stating the intended audience, proposed decision, two or three learning objectives and the evidence likely to be available. If the case is for an introductory course, a narrower question may be preferable to a complex organisational transformation. Use observable learning objectives. Instead of “understand rewards”, try “evaluate internal and external pay equity” or “recommend and justify a reward policy under financial constraints”.

The Case Difficulty Cube (Mauffette-Leenders et al., 2007) distinguishes analytical difficulty (what students must work out), conceptual difficulty (the theory required) and presentation difficulty (the complexity of the information). A challenging case need not be a confusing case. Analytical difficulty moves from evaluating a given decision to finding a solution to a given problem, then identifying and solving the problem. Conceptual difficulty moves from a familiar concept to several or moderately difficult concepts, then complex combinations. Presentation difficulty moves from organised relevant information to some gaps or distractions, then dispersed or incomplete material. Choose the intended level on each dimension to suit the audience at this stage, and state it in the teaching note.

Access the organisation and information

Explain the educational purpose, expected interviews, anticipated publication or classroom use and the arrangements for reviewing sensitive material. Initial permission to collect information is distinct from authorisation to distribute the finished case. Informed consent from interviewees, organisational clearance

and copyright permission serve different purposes; one does not automatically substitute for another. For public-source cases, document the sources and check reuse rights. Check institutional ethics requirements and the policies of the intended publisher before gathering data.

Disguise may be appropriate where identification creates risks. Changing names alone may not protect a company or person if the remaining details identify them. Discuss what may be altered and disclose material disguises without damaging the analytical relationships. Keep confidential records securely and avoid promising absolute confidentiality if it cannot be delivered. Check the release requirements of the intended outlet before agreeing to the terms of access. The purpose is to protect identities while preserving the relationships and evidence needed for analysis.

Consider your own relationship with the organisation. A consultant writing about an intervention they designed may find it difficult to recognise its shortcomings. Seek independent evidence, invite competing accounts and disclose relationships that could affect the interpretation. Organisational review should protect legitimate confidentiality and establish accuracy, not turn the case into a corporate brochure.

Scope the decision

Three considerations are especially important when defining the case's boundaries: the storyline cut (where the story stops), the decision frame (what falls within the protagonist's authority), and the action trigger (why a decision is necessary now). In Quest of Performance Management at the Qadri Group (QG) (Qureshi & Syed, 2025a, 2025b) concerns Asim Qadri, the CEO, confronting performance and reward management concerns before July 2023 increments. The news of a third senior resignation on 3 April gives the story urgency. A case on the entire history of HR at QG would dilute that decision.

A different example is Strategic Planning at Noor Business School (Syed, 2025), where the newly appointed dean must reconcile trustees' financial expectations with faculty and student priorities. The educational value lies in prioritising competing demands under resource constraints, rather than describing the entire institution.

Prepare an outline with proposed headings, a preliminary teaching note, an evidence list and a realistic time plan. Share the proposed scope with the contributing organisation where appropriate and arrange follow-up interviews to resolve missing information.

Explore the evidence

A good interview is an inquiry, not a search for confirmation. Ask the protagonist what happened, what choices were available and what constraints shaped the decision. Ask other participants how they interpreted the same events. Where relevant, speak to employees, customers, suppliers or regulators, rather than relying solely on the senior executive who opened the door. Questions about known facts can also reveal differences in understanding. Obtain consent before recording.

Instead of asking why a reward system failed, ask how managers and employees assessed it and what records support their accounts. Rather than asking whether a CEO resisted change, ask what considerations shaped the decision. Follow general claims with requests for a specific event, date or document.

Build a working evidence register. Record the source, date, access restrictions and verification status of each important claim. Distinguish direct observation from a participant's interpretation. If the HR manager blames turnover on pay and the CEO emphasises benefits, the case should make both accounts visible, using evidence to help students judge their merit. Do not manufacture a false balance when reliable evidence clearly contradicts one account.

For each entry, record the date and whether the material may be quoted, reproduced or shared only in aggregated form.

Where indicators are quantitative, check definitions and denominators. Turnover for a period should have a stated denominator, normally average headcount for that period, and distinguish voluntary departures if

these are the focus. If salary surveys use dissimilar jobs or dates, explain the comparability limits. Do not present a disputed estimate as a verified figure.

Table 2. Illustrative evidence register

Evidence needed	Source	Verification	Permission	Analytical use
Market pay	Salary survey	Comparable roles; dates	Confirm	External equity
Internal pay	Salary records	Grades and benefits	Restricted; confirm	Internal equity
Turnover	HR records; exit interviews	Period; denominator	Confirm	Retention risk
Appraisal and increments	Performance management system (PMS) policy; calculations	Policy version; arithmetic	Confirm	Motivation

4. CRAFT: development and validation

CRAFT comprises five stages: Construct, Refine, Align, Finalise and Test. The FOCUS framework supports the Construct stage by providing a structure for the decision narrative.

Construct the case

First, write a skeleton before drafting full paragraphs. Decide where each piece of evidence belongs, which material should become an exhibit and what the opening and closing paragraphs must accomplish. A narrative is not a transcript or an extended chronology of everything learned. It is a disciplined selection of the material needed for the student's task. The **FOCUS** framework, discussed in Section 5, provides a structural guide for that selection.

The Qadri Group (QG) case examples draw on the published case and its teaching note (Qureshi & Syed, 2025a, 2025b). Suggested wording and applications are illustrative unless identified as direct extracts.

Refine the narrative and exhibits

Use third person and normally past tense for the narrative; retain the appropriate tense within authentic quotations. Write plainly and avoid excessive acronyms. A useful test is whether the reader can distinguish the writer's voice from a participant's view. Instead of declaring that management had an unfair policy, present the relevant policy, figures and employee perceptions and allow students to analyse them. Engage readers through consequential choices, not embellished dialogue or invented thoughts.

For example, "the compensation policy caused the resignations" asserts causality. "The HR manager attributed the resignations to compensation concerns; other managers emphasised the benefits offered by the company" identifies competing interpretations. Use such wording only where the evidence supports the attribution. Use direct quotations selectively to reveal reasoning or disagreement; ensure accuracy, permission and fidelity of translation. Introduce people by full name and designation. In family businesses, first names may improve clarity when several people share a surname.

Exhibits should serve a purpose. Number them, refer to them in the text, identify units and periods, and cite their sources. A salary table should allow genuine comparison; an organisation chart should clarify authority. The QG case contains seven tables in the narrative and seven appendices, including appraisal and increment material. Such detail is worthwhile when it enables the intended analysis; otherwise it can overwhelm learners.

Ask a colleague unfamiliar with the organisation to read the draft. Can they identify the decision and understand the evidence without your verbal explanation? Ask a subject specialist to check the analytical material. Review names, dates, currency units, arithmetic, quotations and internal consistency. A final check should identify any evidence appearing in the teaching note that students cannot find in the case.

AI may help organise approved interview notes, improve language or suggest discussion questions. It cannot establish the truth of a claim or supply missing testimony. Use only approved tools with appropriate consent and data protections; verify all outputs against original sources. Never allow generated quotations or numbers to become case evidence. Disclose assistance in accordance with institutional and publisher policies.

Align the teaching note

A case is incomplete as a transferable teaching resource if another instructor cannot teach it without relying on its author. The TN should explain who the case is for, what students should learn, how the discussion can unfold and how the evidence supports analysis. Begin a preliminary TN while framing the case and revise it as the narrative evolves. This is an application of constructive alignment (Biggs, 1996): the learning objectives, student tasks and assessment should point towards the same capabilities.

Table 3. Illustrative teaching note alignment

Learning objective	Discussion question	Evidence and analytical lens
Evaluate reward fairness	How might pay inequity explain dissatisfaction and turnover?	Salary comparisons, increments, stakeholder accounts; equity theory
Assess the motivational effectiveness of the PMS	How could QG strengthen the effort–performance–reward link?	Appraisal and reward practices; expectancy theory
Recommend a course of action	What should Asim do before the July increments, and why?	Competing views, constraints and strategic goals; integrated judgement

For each question, the TN should explain the relevant concept, apply it to particular evidence, consider plausible counterarguments and identify implications for action. Where calculations are needed, give the workings and assumptions. Avoid introducing a theory merely because it is fashionable. The Case Centre (n.d.) emphasises analysis and practical teaching strategy; a good note also anticipates misconceptions and provides useful follow-up questions.

Equity theory (Adams, 1965) offers an example of analysis rather than mere theory description. Students can examine perceived fairness in the relationship between employees' contributions and rewards, using internal and market comparisons in QG. The teaching note should separate perceived inequity from demonstrated pay disparities and avoid assuming that pay alone caused turnover. Expectancy theory (Vroom, 1964) provides a complementary lens on whether employees believe effort will lead to performance (expectancy), performance will lead to rewards (instrumentality), and those rewards are personally valued (valence). The instructor can ask what evidence would support or challenge either explanation.

Preparation questions and classroom questions need not be identical. Before class, ask students to diagnose the principal problem and recommend action. During class, probe their reasoning: which exhibit supports that claim, what competing explanation is plausible, and what would change their recommendation? Erskine et al. (1998) provide useful guidance on preparing and managing case discussions.

It is equally important to develop a feasible teaching plan. The QG teaching note proposes a 90-minute plan (Qureshi & Syed, 2025b): introduction (10 minutes), initial performance management challenges (10), revisions (20), metrics and motivation (15), rewards–performance link (10), equity and retention (10), and wrap-up (15). An instructor might begin with a poll on the main problem and record competing diagnoses on

the board, then use the evidence to challenge them. The closing discussion can ask groups to defend a recommendation and specify the first implementation step.

Include a synopsis, course and level, prerequisites, learning objectives, preparation questions, relevant theory and analysis, time plan, board plan, optional readings and assessment guidance. If appropriate, include an epilogue and experience of classroom use. The note should be kept separate from student materials. A practical board plan might allocate space to diagnosis, evidence, options and implementation so the class can revisit its initial assumptions. Assess recommendations against the quality of diagnosis, use of evidence, application of theory, evaluation of alternatives and feasibility of action.

Finalise for use

Review the narrative and TN together, confirm figures and quotations, and obtain the release required for the intended use. Authorisation to pilot in a closed class may differ from permission to publish or distribute. Ensure that exhibits and supplementary media are cleared where needed. Retain a dated version of the approved material and a record of the approval. Finalisation establishes readiness for authorised use; classroom experience may lead to subsequent revision.

Test the learning experience

Pilot with the intended audience. Observe whether learners identify the dilemma without prompting, use the evidence rather than rely on generic textbook answers, and develop defensible recommendations. Note questions that repeatedly cause confusion, exhibits that go unused and activities that take longer than anticipated. Invite anonymous feedback and ask a colleague to observe the session where possible. Classroom testing is also a feature of the development guidance at HEC Montréal (n.d.).

Revise the case and TN using this evidence. If students could not calculate a relevant measure, the missing denominator may need to be provided. If everyone selects one alternative instantly, investigate whether the case inadvertently signals the answer or whether the alternatives are genuinely unequal. Seek renewed approval for material changes when required. Record the changes so subsequent instructors know which version was tested. Writers intending to publish should identify a suitable outlet early. Requirements for length, release, disguise, teaching notes and submission formats vary. Familiarity with these requirements can prevent substantial rewriting; classroom testing can strengthen the submission.

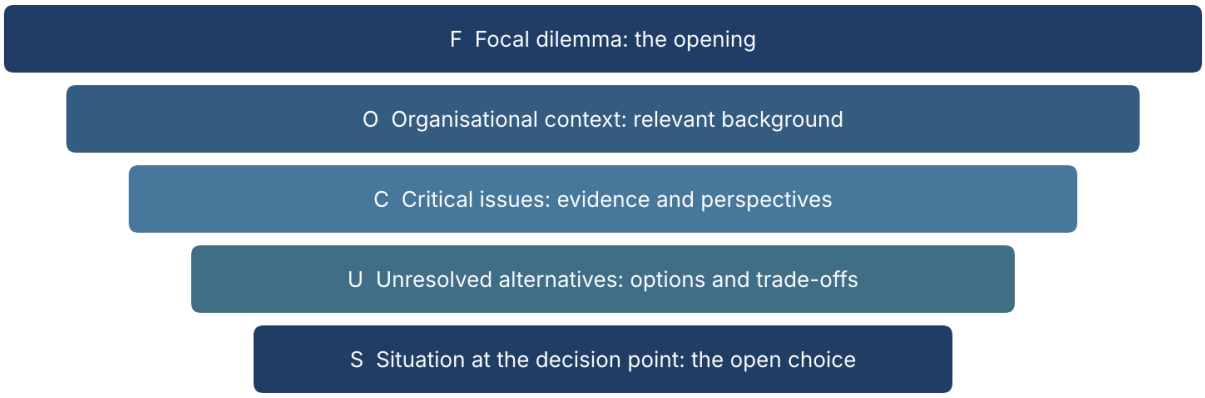
5. FOCUS: structuring the decision narrative

While CASECRAFT, a process framework, guides the overall development of a teaching case and its teaching note, FOCUS, a narrative framework, addresses the architecture of the decision narrative. It operates primarily within the **Construct** stage of CASECRAFT, although its elements can also inform the earlier activities of scoping and evidence collection. Its five components (Focal dilemma, Organisational context, Critical issues, Unresolved alternatives, Situation at the decision point) translate the case funnel (Leenders et al., 2001) into a practical writing plan. The opening and ending are narrative bookends: the opening introduces the decision before the reader has sufficient information to resolve it; the ending returns to it after the evidence, perspectives and constraints have been presented. The approach is consistent with the narrative guidance of Ivey Publishing (n.d.).

Table 4. Indicative FOCUS outline

Component	What belongs here	Indicative pages
F — Focal dilemma	Protagonist, role, date, location, decision and urgency.	0.5
O — Organisational context	Relevant history, business model, industry and environment.	1.5–2.5
C — Critical issues	Decision-specific facts, tensions, perspectives and exhibits.	4.5–6 combined with U
U — Unresolved alternatives	Plausible options, constraints and trade-offs.	Included above
S — Situation at the decision point	Return to the protagonist and unresolved choice.	0.5–1
Total	Excluding exhibits and appendices	7–10

Figure 2. FOCUS narrative structure



F — Focal dilemma

The opening should establish who must act, what the issue is, when and where it arose, and why it matters. Avoid beginning with several pages of company history. In the QG example, the April meeting brings together the CEO and senior HR leaders; the resignation message intensifies an already difficult discussion. A reader has a reason to ask what the CEO should do next.

Compare two illustrative openings. “Qadri Group was a manufacturing organisation with a long history” supplies background but no immediate task. “On 3 April 2023, during a meeting at the Qadri Group’s office in Lahore, CEO Asim Qadri learned of another senior manager’s resignation. With annual salary increments due in July, he had to decide whether changes to performance management and reward practices were necessary to retain key employees.” The second gives the reader a reason to examine the background.

O — Organisational context

Explain the organisation and its environment selectively. For a pay decision, the business strategy, labour market and economic pressures may matter more than an exhaustive account of the founders. Context can also explain why a practice that appears unusual to outsiders makes sense locally. The guiding test is whether removing a paragraph would materially weaken students’ understanding of the decision.

Morning Tea at FGI (Syed & Fayyaz, 2025) offers a useful example of context doing analytical work. The family directors’ autonomy and generational differences help explain why an informal communication initiative encounters difficulties.

C — Critical issues

Develop the evidence that makes the focal challenge difficult. Present the relevant policies, numbers, events and voices; distinguish facts from interpretations. In QG, the relationship between resignations, compensation, performance management and strategic goals gives students several avenues for analysis. Use headings that describe topics rather than announce the author's diagnosis.

U — Unresolved alternatives

Expose the options available to the protagonist at the time. In QG, the case presents a proposed market survey, reservations about that proposal amid economic slowdown and a narrower survey of critical positions. These positions create a useful debate about information needs, cost and talent risk. Do not invent an option simply to create a convenient three-way choice. If the alternatives were implicit, distinguish what was known then from what students might propose themselves. Some cases intentionally ask students to generate alternatives. Alternatives may emerge through conversations, proposals or disagreements rather than a separate section.

Productive ambiguity exists when credible information supports different interpretations. It should not arise from missing essential figures, vague descriptions or inconsistent dates. In Morning Tea at FGI, students might debate whether to continue informal meetings, modify them or introduce more structured governance (Syed & Fayyaz, 2025).

S — Situation at the decision point

Return to the protagonist, the relevant constraints and the deadline. The closing paragraph is not a research conclusion: it should not announce the best answer. In QG, returning to the April meeting and the forthcoming July salary increments closes the narrative circle while preserving the choice. If the actual outcome is known, it can be placed in a separate epilogue or teaching note rather than disclosed prematurely.

Illustrative ending: "With the July increments approaching, Asim had to decide whether to commission a comprehensive market salary survey, restrict it to critical positions or reconsider the need for a survey given the economic slowdown. Each approach carried implications for costs, employee retention and the group's longer-term plans."

6. Putting the frameworks to work

A first case need not be ambitious. A manageable decision, a cooperative organisation and sufficient evidence are better starting conditions than a complex company-wide transformation with incomplete records. Read two or three published cases in the intended discipline and examine how their opening, evidence and endings work. Compare their teaching notes where you have authorised access.

The QG example can be used as a worked application of both frameworks. Conceptualise around performance management and retention; Access relevant people and records; Scope around the April decision point and the forthcoming July salary increments; Explore salary, turnover and appraisal evidence; Construct the narrative from the April meeting through context and alternatives; Refine for balance and accuracy; Align with equity and expectancy theory; Finalise for authorised use; and Test through classroom discussion.

As a first step, prepare a one-page concept: identify the protagonist and learning purpose; sketch the decision and deadline; specify three sources of evidence; and draft the first paragraph. Then exchange it with a colleague and ask whether the decision is clear and whether the proposed evidence can support the objectives. Use the feedback to develop a case plan and a preliminary teaching note before undertaking extensive data collection. A structured case development template can help keep the concept, access arrangements, evidence plan, outline, opening paragraph, preliminary TN and timeline aligned.

Before moving from one stage to the next, writers can use the readiness check in Table 5.

Table 5. CASECRAFT readiness check for new writers

Stage	Ask yourself before proceeding
Conceptualise	Is there a clear, worthwhile learning purpose?
Access	Are access, consent and confidentiality appropriate?
Scope	Is the focal decision manageable and credible?
Explore	Is the evidence sufficient, verified and balanced?
Construct	Does FOCUS organise the narrative effectively?
Refine	Is the draft accurate, readable and engaging?
Align	Can another instructor teach and assess it?
Finalise	Is the package complete and cleared for use?
Test	Has feedback informed the next revision?

Use the checklist as a diagnostic, not a numerical score. A single unresolved permission or evidence issue may prevent use, even when every other item is satisfactory.

CASECRAFT and FOCUS connect the practical work of gathering and writing evidence with the pedagogical work of enabling students to exercise judgement. Their usefulness ultimately depends on the quality of the cases and the learning they enable.

Declaration: Generative AI tools were used to assist with editing and formatting; the author reviewed all content and is responsible for it.

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