Structure Requirements for Written Case Deliverables

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Course: *BUS 302*
Title: *The Gateway Experience* (3 units)

"The skill of writing is to create a context in which other people can think."
---*Edwin Schlossberg (1945-)*

Introduction

The purpose of this document is to enumerate the requirements for all written case assignments in this course, except as indicated differently by the instructor in class. Teams will lose points for not following the instructions below. Some work deliverables have a wide degree of flexibility in structure (for example, in management or marketing contexts). However, many work deliverables have little or no flexibility in structure (for example, in accounting and law contexts). The case deliverables in BUS 302 are designed in such a way to provide ample practice with both of these two types of composition.

If this document is unclear, please contact the instructor. The order of presentation in this document is the order the sections should appear in the written case reports.

Electronic Submission

Each written case must be submitted electronically via email to the instructor. The subject line of the email must begin with "[CSUN Bus302 <#classnumber>]" where <classnumber> is the appropriate, 5-digit class # (with the octothorpe, but without the chevrons). The rest of the subject line must contain both an abbreviation of the specific case (such as "Spa case") and the team number (such as "Team 1"). The body of the email may contain a brief paragraph regarding the submission as necessary. Often the body of message includes a repeat of the gratitude from the cover letter for being offered the opportunity to work on this case for this company.

The email message must also contain *two and only two* attachments. The first attachment consists of the full, written case report. This first attachment to the email must consist of a single file and that file must be the same document that will be submitted in printed form. The file format is to be MS-Word (.docx or .doc). There are many choices in word processors, and they all export to an MS-Word file. The second attachment consists of each mathematical (accounting, economics, and statistics) calculation or quantitative procedure that is needed and/or appears in the written report. This second attachment to the email must consist of a single spreadsheet file (Excel workbook). The file format is to be MS-Excel (.xlsx or .xls). This Excel workbook should be well-designed, including separate cells for constants (i.e., not manually-entered in formulas—called "hardcoding"), and liberal use of multiple "worksheets" inside the single "workbook" that link various parts of the analyses together. In principle, the Excel workbook should 1), be literate to a reader (including documenting cells and identifying key rows and columns clearly), and 2), be re-usable by both the team and others as needed in the future.

The electronic submission is to be received in the instructor's Email InBox no later than 1 hour before the printed copy is to be submitted (that is, no later than 1 hour before the beginning of class). **Any later submission is considered late.** Strong teams will incorporate these immutable deliverable requirements into their planning structures.

Print-based Submission

Each written case must be submitted in printed form. The printed version of the case is to be submitted immediately at the beginning of class. The beginning of class should be interpreted to mean no later than 1 minute after the class starts. **Any later submission is considered late.** Again, strong teams incorporate this deliverable requirement into their planning structures.

Grammatical Person

Cases must be written in the *third-person*. Whenever possible, avoid using first-person singular ("I"), first-person plural ("We"), or second-person ("You"). This helps promote consistency—both within and among cases—and overall objectivity.

Document Binding

Each written case report must be submitted as a single unit. There should be a single staple in the upper-left hand corner of the document. If the document contains too many pages to be stapled reliably, then teams may elect to use a binder clip (9/16" or 3/4" in size) in the upper-left hand corner of the document.

Cover Page

Each written case report must have a cover page. There is no single "one" format for this page; in fact, some teams may choose a more professional format and some teams may choose a more creative format. Some teams do both because they view a distinctive cover page as a key element of their teams' (i.e., firm's) "branding". Either is acceptable, as long as the following information is clearly identifiable—team number (and team name, if applicable), all of the team members' names (with the last name underlined), class # (or day/time identification), case name, and due date. If a team member did not contribute to the written report, then next to her or his name write "did not contribute". The cover page must not have a page number.

Cover Letter

Each written case report must have a cover letter. In general, the cover letter is written in a simple “memorandum” (or formal email) format. The “Date:” is due date. The “To:” will usually be a key principal identified in the case. The “From” will be your team number (or team name). The “Subject:” is the name of the case. The cover letter should consist of a two brief paragraphs. The first paragraph indicates the general nature of the case (two sentence summary) and what you did to analyze the case (again, a two-sentence summary—for example, “our team consisted of professionals with complementary backgrounds,” or “we analyzed the facts and issues of the case, including potential strategic and ethical implications.” The second paragraph should be an expression of gratitude, such as “It was our pleasure to work with your firm on this case; please do not hesitate to contact us if you require more information.” There is no single “one” format for this page. The cover letter is similar to a “transmittal letter” as taught in traditional business communications courses. The cover letter must not exceed one page. The cover letter must not have a page number.

Table of Contents

Each written case report must have a table of contents. Every section of the team report, (but not the cover page, not the cover letter, and not the table of contents), should be included in the table of contents. It is likely that the “main body” section of the report will probably have three or more sub-sections, and these too should be in the table of contents (appropriately indented). Each section or sub-section should be appropriate. For example, “Question 1” is too short and uninformative. Repeating the full and complete question to be answered is likely far too long. Something such as “Potential Liability for Negligence” might be appropriate. The same is true for sub-headings as well. Also, ensure that the headings in the table of contents match the headings/titles in the main body (e.g., “strategic considerations” doesn’t match “strategy consideration”).

Each section should be numbered. The section numbers in the report should use Roman numerals (e.g, “Section IV.”), but may alternatively use Arabic numbers (e.g., “Section 1”) as the team desires. The page numbers must use Arabic numbers (e.g., “12”) for all page numbers. The table of contents must use standard “dot leaders” to connect the section name with the section page number, and the page numbers must be “decimal-aligned” (since the page numbers are all integers, “decimal-aligned” is equivalent to “right-aligned”). The table of contents should be at least one-half of a page, but must not exceed one page. In general, using more of the space in the table of contents is better than using less of the space in the table of contents. The table of contents must not have a page number.

Executive Summary

Each written case report must have *one and only one* executive summary page. This page must have either two or three paragraphs. In the three paragraph format, the first paragraph is a brief summary of the material facts and/or issues in the case, the second paragraph is a brief summary of the kinds of analyses your team performed, and the third paragraph is a brief summary of the key recommendations. In the two paragraph format, the issues and the analyses would likely be combined into a single paragraph, and the recommendations are in the following paragraph. Some teams may even elect to put the key recommendations in the first paragraph because they are, in effect, the most important. The executive summary must not exceed one page. The executive summary page must have a page number.

Address Questions ("Main Body")

The main body is the central part of the document. There is no single "best" structure for the body of the business report, but these guidelines should be used in order to be consistent with all the cases in BUS 302, and in order to provide practice for a wide variety of deliverables in a student's academic and professional future. The narrative begins with a section for material facts, and is followed by a section for "open issues and questions". Individual, specific questions (these will be handed out in class by the instructor) are then raised and analyzed in subsequent sections. Please make sure these questions are clearly identified and addressed. Use section headings and sub-section headings to delineate specific parts of the report. The "main body" must contain at least one table, one figure, and one equation. Often, the table is a summary of accounting or statistical data, the figure is a chart or an exploratory statistical distribution, and the equation is an important accounting, economic, or statistics formula used in the analysis. In addition, the main body must contain at least one reference to the provided case itself (to cite the source of the facts), and, if the case involves law (most but not all cases do), at least one reference to each item in the provided (law) "case library". For legal analysis, use the "case library" to generate strong arguments and counter-arguments following the organization on slides 9 and 10 of the Powerpoint mini-lecture entitled "Legal Analysis for Business Case Study". The primary references for the main body are the case and the case library, and if needed, any secondary references for the main body can be a textbook from a prior course. For some cases, often the cases later in the course, the instructor may require more secondary source references. The "main body" section must be no less than ten pages and no more than twenty pages. Each page in the "main body" section must have a page number.

Ethical Considerations

Each written case report must have an "ethical considerations" section. This section focuses on the values and decisions that may impact various stakeholders, other parts of the organization, industry, or society. This section begins with an identification and enumeration of all of the direct and indirect stakeholders. This section must be organized around one of the major *Approaches* (e.g., "Tucker's Five Questions", "Velasquez's Approach") in the coursepack reading on "Ethical Decision-making" (for some cases, the instructor may tell you which specific Approach to use). Using one of the *Approaches* helps organize the paragraphs containing the ethical narrative. Strong teams will address the key ethical issues affecting the key stakeholders using at least *four* of the ethical theories (e.g., "utilitarianism", "deontology", "rights theory", etc.) in this section. In general, teams spend a good deal of team outside of class discussing and debating the ethical considerations among the team members. Additionally, you may also use ideas from other lower-division courses, such as philosophy or humanities. The “ethical considerations” section is to be no less than two full pages and no more than three full pages. Each page in the “ethical considerations” section must have a page number.

Strategic Considerations

Each written case report must have a “strategic considerations” section. This section focuses on issues that may 1), substantively change the capital or labor structure of the organization, 2), alter the values, vision, mission, objectives, or goals of the organization, 3), significantly change a key product or process, 4), be inherently long-term or have far-reaching impacts, or 5), impact other parts of the organization, industry, or society. This section must be organized around one or more the major frameworks from the HBR or supplemental readings on “Strategy” (e.g., “Porter’s five forces,” “Generic Strategies”) or the model presented in the “Strategic Thinking” paper. Unlike the “ethical considerations” section, the strategic theory that each team is to use will vary for each case (the instructor will tell you which one to use, and there is reading for each different strategy theory assigned for each case as well). Additionally, you may also use ideas from other lower-division or upper-division courses. The “strategic considerations” section is to be no less than two full pages and no more than three full pages. Each page in the “strategic considerations” section must have a page number.

Recommendations

Each written case report must have a “recommendations” section. The “recommendations” section should link to one or more conclusions from each section in the “main body” (technical analysis) of the report. The “recommendations” section is where a team gets to repeat key findings (and limitations, if necessary), support or challenge conclusions, and perhaps most importantly, offer suggestions and reasoned opinions. Don’t be “wishy-washy” (i.e., equivocal or “on-the-fence”); make deliberate and actionable recommendations that your team feels that it can defend comfortably and publicly. Organizations *want* your teams’ perspective; it’s just that your opinions can’t have any value until *after* you have done prior, sufficient technical analysis including ethical and strategic considerations. The “recommendations” section is to be no less than one full page and no more than two full pages. Each page in the “recommendations” section must have a page number.

References (“Works Cited”)

Each written case report must have a reference page(s). The reference page is also sometimes called a “Works Cited” page. Either title is fine. The use the APA style guide for formatting requirements is preferable, but MLA style is acceptable as well. There must be an inline citation and source reference for the facts (the case text), and for each theory (accounting, economics, and statistics) used in the “main body” (use material from your previous lower-division courses). Law, of course, will have at least one citation (and probably more) to cite the elements of the law in the case, and more importantly, in the argument and perhaps the counter-argument. There will also be at least one inline citation and source reference used to support your ethical considerations and at least one inline citation and source reference used to support your strategic considerations. Occasionally, the instructor will require the use of secondary sources (usually later in the course) in specific sections and, of course, these will need to be cited and sourced as well. The “references” section is to be no more than two full pages (a single page will suffice for nearly all cases). The reference page(s) must have a page number.

Appendices

Each written case report may have one or more appendices. There is no single “one” format for the appendix. Often the appendix contains additional calculations or tables that are too detailed or too abstruse for the “main body”. Occasionally, an appendix is useful in cases whether the maximum number of body has been reached. There is neither a minimum nor a maximum number of pages for the appendix. Each page in each appendix must have a page number.