

NEW CASE PLANNING WORKSHEET

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Author(s) Name: _____ **Contact email:** _____

Organization: _____

CASE TYPE (pick one)

1. **Field based** – preferred type. Cases released for general distribution by the subject organization and require a Consent to Use form.
2. **Published source** – Requires appropriate and sufficient footnotes for all attributed statements, actions, feelings to actual persons or subject organization.
3. **General experience** – least preferred method. These cases are based on an author's first-hand experience with a real organization and can be disguised, if permission to use is not possible.

SUBJECT ORGANIZATION: _____

EVENT TIMING: When does the case take place? _____

CASE PROTAGONIST: Who is making the decision in the case? _____

POTENTIAL DECISION POINT(s):

1. _____
2. _____
3. _____

LEARNING OBJECTIVES: Should have 3-5 in mind.

INTENDED AUDIENCE: At what level of study is this case appropriate (check all that apply)

- ☐ Introductory ☐ Undergraduate ☐ MBA/Postgraduate

DISCIPLINES (In what courses or modules would this case be best positioned? (check maximum of three):

- | | |
|--|--|
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Introductory Business |
| <input type="checkbox"/> Entrepreneurship | <input type="checkbox"/> Management Science |
| <input type="checkbox"/> Finance | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> General Management/Strategy | <input type="checkbox"/> Operations Management |
| <input type="checkbox"/> Information Systems | <input type="checkbox"/> Organizational Behaviour/Leadership |
| <input type="checkbox"/> International | <input type="checkbox"/> Other |

EXHIBITS: Are recommended. Examples: Data, Financial statements, annual reports.

NOTE: All Submissions require a Teaching Note.

CITATIONS: Footnotes are required for all source citations. Ivey Publishing uses *The Chicago Manual of Style*, 16th edition (2010).

*Further resources regarding guidelines and submission are available at:
<https://www.iveypublishing.ca/s/publish/ready-to-publish>