



 **SAGE** **businesscases**

Bring the real world to the classroom

# Author Guidelines

**SAGE Business Cases (SBC)** is a digital collection of cases from across the range of Business and Management disciplines. Sold around the world directly to academic libraries, **SBC** includes cases that can be used for a wide range of pedagogical needs, from illustrating core business and management skills in the classroom to independent student projects. Delivered on SAGE's digital library platform, *SAGE Knowledge*, **SBC** will allow for cases to be integrated with SAGE's leading journal, book, reference, and video content.

[sk.sagepub.com/cases](http://sk.sagepub.com/cases)

# What Types Of Cases Will SAGE Publish?

SAGE is interested in well-written, detailed teaching cases that expose students to real-world business problems and scenarios. Cases should be approximately 1,500-5,000 words in length and can be written for the undergraduate or graduate level. Authors can base their cases on direct field research or write them using publically available sources. We will also consider cases based on fictional or anonymized companies or business scenarios. A successful case will:

- Grab the reader with an engaging introduction that highlights the decision point/focus of the case, provide a set of coherent and achievable learning outcomes, provide an interesting case that clearly develops its focus and meets set learning outcomes, and conclude with a succinct summary.
- Include a range of thought-provoking questions that will help initiate class discussion or encourage further research.
- Present the business problem or situation in a non-biased manner, allowing for discussion and various outcomes or solutions to the case.
- Assume a global, multicultural readership.

In short, each case should aim to equip students with business knowledge and skills that are relevant to their future working life and help develop their critical thinking and decision-making skills. SAGE plans to grow **SBC** into a case collection that offers students, librarians, and

instructors a wide range of disciplines applicable across the undergraduate and graduate curriculum, including:

General Business & Management

Business Ethics

Economics

Finance

Human Resources Management

Information & Knowledge Management

International Business & Management

Leadership

Management Science

Marketing

Operations Management & Supply Chain

Organization Studies & Behavior

Small Business & Entrepreneurship

Specialized Management

Strategic Management & Business Policy

Research Methods for Business & Management

Sustainable Business

## Elements Of A SAGE Business Case

Below you will find details on, and examples of, the elements that we'd like to see in your **SBC** case.

### Abstract

The abstract should provide a succinct overview of your case, giving **SBC** users a quick snapshot to assess your case's relevance to their classroom or research needs. It should also highlight the relevant decision points or foci of your case. The content of your abstract will also help aid discovery of your case within **SBC** and through open-web searches.

## Here are some samples:

### EXAMPLE 1:

Carter is faced with the challenge of choosing charitable causes for three separate companies to partner with for upcoming cause-related marketing campaigns. He initially thinks that any charitable cause will work due to the generally positive associations of corporate philanthropy, but marketing research informs him that perceptions of brand/cause collaborations may be more complex than has been traditionally assumed. This case encourages students to process the multifaceted nature of charitable causes and the different types of collaborations firms can achieve through brand/cause partnerships.

### EXAMPLE 2:

In October 2014, all the attention of the U.S. media was focused on the Presbyterian Hospital in Dallas, Texas. This case describes how the events that took place during the first incidences of the Ebola virus in the United States impacted the reputation of an iconic hospital in Dallas. The case invites students to put themselves in the shoes of a business consultant who has been hired by the Presbyterian Hospital of Dallas to provide recommendations about how the hospital failed in response to the Ebola virus crisis and about the strategic steps to recover the reputation of the hospital.

## Learning Outcomes

The Learning Outcomes section will help both students and instructors by:

- focusing on the specific goals of the case,
- highlighting what students should take away from the case, and
- emphasizing the key lessons the material intends to impart.

Your Outcomes should be helpful both for student self-study, as well as for classroom use. Furthermore, your Learning Outcomes should be directly covered in the case content and addressed in the Discussion Questions.

## Here are some samples:

### EXAMPLE 1:

Students should have an improved understanding of the following:

- Why a company should develop more stringent standards than required years before formal mandates.
- What the advantages and disadvantages are of shaping policy formulation and initiating new strategic programs.
- Perspective into how an integrated system evolves over time and how incremental innovations can lead to profound outcomes.
- Use of sustainable business practices to stay ahead of competitors and to meet societal and customer needs.
- Why the pursuit of sustainability can be a significant factor in achieving high-level performance and sustaining success.

### EXAMPLE 2:

This case study will allow students to illustrate the impact that the global economy has on international and domestic theme park metrics. It also provides insight into the overall theme park industry, including types of theme parks, points of differentiation, market size, and structure of competition, in addition to specific insight into Disney's theme park business, including history, current strategy, and operational considerations. Students will gain a broader international viewpoint of markets and competition, specifically emerging and mature markets, and will use critical thinking to analyze how firm type, size, location, or being an industry leader such as Disney can impact market forces and strategic decisions.

## Discussion Questions

While we recognize that different cases will require different amounts of review questions, a reasonable goal is 4-7 questions. Questions should be specifically related to the case material and tied back to the learning objectives for the case. Ideally, your questions will encourage healthy classroom debate and allow for different opinions/outcomes, and promote higher-level thinking.

Some Discussion Questions may allude to larger ideas that require further research, but the majority of questions should be answerable based on case content. If background or additional information is required for an answer, please provide as much as possible in the case, or introduce it in the case and expand upon it in a background section in the Suggested Teaching Strategy of the Teaching Notes.

## Here are some examples of Discussion Questions:

### EXAMPLE 1:

1. Apart from culture and price, which other factors do you think could influence UK-based consumers in their choice of foods? Use appropriate categorization to list the factors and explain the main differences between the categories of factors that you have listed.
2. Select a type of food of your choice and explain how culture could influence the consumers in its purchase, considering the main stages of the consumer decision-making process.
3. Apart from food, do you think culture could be very influential in British consumers' purchase of other products? If yes, use a particular product as an example to explain how this can be so.
4. What is the difference between enculturation and acculturation? How is this difference demonstrated in the case study?

### EXAMPLE 2:

1. Provide a characterization of the global express package delivery and logistics industry.
2. Why would DHL engage in sustainable practices and why would it want to set up the center with the National University of Singapore?
3. How do DHL's competitors compare on sustainable practices and how do they capitalize on these activities?
4. What are, potentially, some of the conditions in an industry that may lead to a race to the top?
5. How does the partnership with DHL, through the Sustainable Supply Chain Centre of Asia Pacific, benefit the National University of Singapore? What are its concerns?
6. Considering all of the various international civil society organizations interested in sustainable supply chains, mentioned in the case and otherwise, should the new Sustainable Supply Chain Centre of Asia Pacific engage with them, and if so, which ones and how?

- Provide information on the intended audience for the case and suggest pedagogical approaches and strategies
- Give insight and feedback on how teaching this case has worked in practice (if applicable).
- Teaching notes should provide potential answers to or "solutions" for the discussion questions.
- Include suggested further reading in the subject area the case covers.
- Introduce minimal "new" information in the Suggested Answers to Discussion Questions. If background information is required beyond the case content, it can be included under the Suggested Teaching Strategy. Analysis of that information may then be presented in the Suggested Answers.

Your teaching Notes should be organized under the following headings:

- **Case Summary:** This summary should differ slightly from the Abstract. The Case Summary may reference the Teaching Objectives of the Teaching Notes and be lengthier than the Case Abstract.
- **Teaching Objectives:** These objectives should relate to the Case Learning Outcomes, but not provide a carbon copy. These may be instructor/pedagogy focused.
- **Target Audience:** Consider listing the intended level and courses this case targets.
- **Suggested Teaching Strategy:** May include a background section in addition to pedagogical approaches and strategies.
- **Suggested Answers (or Solutions) to Discussion Questions**
- **References:** Lists only References for the Teaching Note citations
- **Further Resources:** Further reading required for students to answer discussion questions or meet teaching objectives

### Further Information

**Appendix A** provides a checklist so you can ensure you have the exact content you need to submit a case for consideration.

**Appendix B** answers all your burning FAQs.

## Teaching Notes

To ensure that **SBC** cases are useful for Business faculty, we ask that each case include teaching notes. Teaching notes will be available only to authenticated instructors and should:

- Clearly state how a case could be used in coursework and the pedagogical outcomes that can be expected from its use.

# Style and Formatting Specifications

It is important that manuscripts conform to the specifications below. Your case will be part of a unified whole, and following the guidelines below will ensure that the product is as coherent and useful as possible.

## Length

Your case should be no shorter than 1,500 words in length and no longer than 5,000 words, including the abstract. Author biographies and references are not included in the word count. If your case deviates from these page guidelines, please consult with **SAGE Business Cases** editorial before submitting. Manuscripts should be submitted as a Word document, double-spaced throughout in 12pt Times New Roman.

## Language

Manuscripts should be submitted in either American or British English, with spelling and punctuation styles consistent throughout. Whenever possible, please simplify sentences to clarify key concepts for students.

## Case Title

All cases submitted need a title. Case titles should be descriptive and not simply decorative. By this we mean, please ensure the case title helps identify what the case is about. You may consider including the organization name or the field that the case examines (e.g. leadership, business ethics, or marketing). Remember that titles help students and course co-ordinators find relevant articles. Make sure the case title does justice to the content of the case.

Teaching Notes should have the same title as the case with a clear subtitle: Teaching Notes. Bear in mind that the title page is the only part of the case that should identify the authors, as the case will be subject to a double blind peer-review.

## Headings Structure

When structuring the case using headings, please use the following styles:

**Level 1 Heads flush left, bold (14 point)**

Level 2 Heads flush left, bold and italic (12 point)

*Level 3 Heads flush left, Italic (12 point)*

The following sections should be considered Level 1 heads:

- The top level of headings within the case
- Abstract
- Learning Outcomes
- Discussion Questions
- References
- Further Resources
- Case Summary
- Teaching Objectives
- Target Audience
- Suggested Teaching Strategy
- Suggested Answers (or Solutions) to Discussion Questions

You may consider using Level 2 and 3 headings in the case to break up large sections of text, clarify or highlight important concepts, and guide students where necessary.

## Figures and Tables

Figures (data graphics, images, photos, etc.) should only be used when appropriate to the discussion in the text, and not for general illustration or decorative purposes. They should always be called Figures and Tables, not Exhibits, Images, Photos, etc.

Please bear in mind permissions-issues when you choose figures and tables!

### Numbering and Naming in the Case

Figures and tables should be referenced in the case and numbered sequentially, with their placement clearly indicated within the main text. They should be given a number and an appropriate name: Figure 1: XTitle; Table 1: XTitle.

### Numbering and Naming in the Teaching Notes

Each figure and table in the Teaching Notes should also be numbered sequentially -- starting from 1 again -- with their placement clearly indicated within the main text. These figures and tables should be titled Teaching Notes Figure 1, Teaching Notes Figure 2, Teaching Notes Table 1, etc.

Case figures and tables referenced in the Teaching Notes do not need to be replicated. Simply refer readers to Case Figure X or Case Table X.

## Captions and Descriptions

Each figure and table should include a caption as well as a textual description for the benefit of the visually impaired using text-to-speech readers. For example:

### Caption:

Figure 1. The product/market (Ansoff) matrix.

### Description:

Figure 1. A matrix showing four growth strategies. Along the x axis are products and along the y axis are markets. The intersection of these axes represents either market penetration, product development, market development, or diversification.

Please provide the captions within the case text. Please provide all the Descriptions in a separate document.

Epigrams and epigraphs should be avoided unless pre-existing permission has been obtained for their use.

## Permissions

If the figure or table is not your own unpublished work and requires permission for re-use, you must also include the credit line specified by the copyright holder.

## Submission to SAGE

Figures and tables should be uploaded separately during the SAGE submission process. Please submit your figures and tables in separate documents as follows (as applicable):

- all Case figures in a single document
- all Teaching Note figures in a single document
- all Case tables in a single document
- all Teaching Note tables in a single document.

## References and Citations

### What to Cite

Please avoid using citations as exhaustively as you might in a journal article. If you feel that someone's work must be cited by name, you can briefly describe it in the main text of the entry, use a hyperlink to refer readers to web content, or use a standard parenthetical citation (e.g. when providing a direct quote, citing data from a study, providing a source for a table or figure, citing something for which you have obtained permission, etc.).

### Reference Lists and Further Resources

All work that is cited within the text should be included in the reference list. References should be collated and listed at the end of the document, in alphabetical order. Any references that you wish to include that are not cited within the text should be added in a 'Further Resources' section, after the Reference list.

Citations, references and lists of further reading should conform to American Psychological Association (APA) style, and should contain the digital object identifier (DOI) where available.

## Hyperlinks

You may hyperlink to other web resources throughout your case and in any supplementary materials. If you would like to link text to another resource, please embed the hyperlink in the relevant text (in Word, select the text and press Ctrl+K). [Here is an example.](#) Hyperlinks do not need to be included in the References list unless they are used as citations, nor do they need to appear in Further Resources.

## Footnotes, End Notes, Appendices

Please do not use footnotes as they don't transfer well to a digital-only product, but you can include endnotes and/or appendices. Where possible include all relevant information within the main body of the text or as a figure.

### Permissions and Copyright

If you use any unoriginal material (including both text and images) then you must **obtain permission from the copyright holder to use it prior to submission.** You must obtain non-exclusive rights to reproduce the material in all media in all languages throughout the world.

If you believe your use of previously published material qualifies for fair use or fair dealing for the purposes of criticism or review, please flag this with your editor when you submit the manuscript. There is more information on fair use and fair dealing on the SAGE website.

**You are responsible for clearing permissions** and it is your responsibility as an author to warrant to SAGE that any permissions required are cleared and that no copyright is infringed by your case study. Generally, SAGE does not require that you obtain permission from the organization or institution that you discuss within your case. However, we ask our authors to be vigilant about appropriate ethical behavior and professionalism.

You also need to warrant to SAGE that the case is accurate and valid, and that you have not libeled any individual or organization in your case. Facts must be accurate and verifiable, and statements of opinion clearly identified as such.

Please also note that "disguising" a case by using pseudonyms does not free you from these responsibilities.

# The Review Process

Once your case is ready for us to consider, contributors should submit via the SAGE Track submission site:  
<http://mc.manuscriptcentral.com/sbc>.

As your case study will be going through peer review, your title page, case study, figures and tables, and Teaching Notes should be submitted separately. Once all the elements have gone through peer review, you will receive an e-mail notifying you that comments are available. These comments, along with possible developmental editor comments, are intended to help you improve your case. Next, the SAGE Track system will guide you through submitting your revised case.

Once your case has been accepted you will receive a link to your Contributor Agreement as well as a form to provide the necessary information for processing your payment.

Your case will then go into Production, where it will go through copy-editing and layout. You may be contacted during these stages for clarification, revision, or additional information.

If you have any other questions about **SAGE Business Cases**, please get in touch with:

Maureen Adams, Senior Acquisitions Editor:  
[Maureen.adams@sagepub.com](mailto:Maureen.adams@sagepub.com)

**SAGE Track is a ScholarOne site; find site-specific information here:**

<http://mcv3help.manuscriptcentral.com/stalkjddfesd/MC4Help.htm>

# Appendix A: Case Elements Checklist

<b>Title Page</b>
Contributor biographies & contact details
Link to research output & external data source
<b>Case Content</b>
Appropriate title
Abstract
<b>Learning Outcomes</b>
Discussion Questions
List of further readings or links to web resources for further reading
List of references cited
<b>Teaching Notes</b>
Case Summary & Target Audience
Pedagogical approaches & strategies (the case in practice, if applicable)
Background information or further reading (if applicable)
Potential solutions or guidance for discussion questions
<b>Figures and tables</b>
Sequential number
Caption & Description
<b>Metadata (recorded on SAGE Track)</b>
Title
Abstract
Type of Case
Subject Area
Related Country/Countries
Related US State(s)
Organization Name
Organization Size

# Appendix A: FAQs

## Will my case study be published in print or in a book?

**SBC** is a digital-only product. We offer university-wide access to our cases, providing easy access for student and faculty use in courses and research. All the cases on **SBC** are available in full text on a fully mobile-friendly site, as well as pdf file for easy printing.

## Is *SAGE Business Cases* a peer-reviewed journal, with an impact factor?

**SAGE Business Cases** is not an indexed journal; however, the collection is peer-reviewed and is overseen by an Advisory Board of international academics. Each first draft will be assessed by editorial staff at SAGE. If we like what we see, the case will be sent to peer-review. SAGE's expert review board will assess each case for quality, accessibility, and usefulness in the classroom. While **SBC** is not a journal in the traditional sense, you can feel confident listing your case under peer-reviewed publications in your CV.

## What level of student will use my case study?

**SBC** will feature cases that can be used in both undergraduate and graduate courses. Your teaching notes and discussion questions will help guide instructors in how to best adapt the material for various levels.

## Will all cases be published?

We will work closely with you to ensure that your work meets with the aims and objectives of our collection. However, the final decision about whether to publish a case study rests with SAGE and its academic reviewers. If after careful consideration SAGE decides not to publish your case, it will be returned to you and you will be free to utilize it in any way you wish.

## How do I turn my conference presentation/published research into a case study?

The key is to find a central problem or decision point within your work that you can then adapt into a narrative that will be useful in the classroom. Ensure that your work has the required case elements listed in the Appendix A Checklist and discussed in detail in this document.

## Can I use my case study in a class or presentation?

While you are licensing the right for SAGE to use your case, you retain the copyright and we will provide you a PDF of the published case and teaching note for your own classroom or non-commercial use.

## Can I see a sample case study?

Yes. We have included snippets of case studies within this document, but if you wish to see a full sample case study--or have any other questions--please contact us.