



Alberta Deans of Business

Case Competition

Official Handbook

**LIVE CASE FORMAT**

Revised January 2025

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## **MISSION**

To enhance the role of business training and education in the economic development of Alberta.

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## **MANDATE**

1. To promote cooperation among Alberta Deans of Business (ADB) member institutions for training, education, research and consultancy.
  2. To develop and promote cooperation with similar associations, national and international agencies, intergovernmental organizations, foundations and other organizations that advance business education, training and research.
  3. To promote leadership, management and administrative development by encouraging dialogue and cooperation between professional associations and business, industry and government.
  4. To promote cooperation between ADB member institutions and business, industry and professional organizations.
  5. To share and disseminate relevant information.
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## **MEMBERSHIP**

ADB membership shall be open to representative Deans or equivalent senior administrators responsible for undergraduate business programs, at institutions operating under the jurisdiction of the Public Institutions Brand of Alberta Advanced Education.

## **ASSOCIATE MEMBERSHIP**

Associate membership shall be open to Deans or equivalent senior administrators responsible for undergraduate teaching business programs, at institutions operating under the jurisdiction of the Public Institutions Brand of Alberta Advanced Education.

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## **ALBERTA DEANS OF BUSINESS CASE COMPETITION**

In their effort to enhance the role of business training and education, the Alberta Deans of Business began a provincial case competition in 2005.

The competition is hosted by one of the ADB member institutions, often with support from outside agencies. Teams from member institutions around the province travel to the host venue for the multi-day event which begins with a networking dinner and keynote address. The competition concludes with a lunch and presentation of awards by the judges.

### **INTRODUCTION TO THE COMPETITION**

This competition is open to students from Alberta post-secondary institutions which offer business programming. Teams from each institution consist of four students. In order to ensure anonymity of the teams and impartiality of the judges, the teams will not be known by their school names during their presentations. Each team will be assigned a team name. All teams will analyze the same case during the competition. The students are given a case, selected by a sub-committee of the Alberta Deans of Business. The students analyze the case then work as a team to present strategic solutions and recommendations to a panel of judges selected from the business community. Though teams work on their own in the development of their analysis and presentations, they can meet with their advisor(s) – usually an instructor – AFTER their presentation has been handed in. Advisors can watch their presentations and offer commentary at that point. Instructors are not given a copy of the case study.

### **THE CASE**

Teams are given a case to analyze, research, and ultimately construct a recommended course of action, which will be presented before a panel of judges on the final day of the competition. A sub-committee of the ADB will select a business case based on, at minimum, the following criteria: elements from business stream courses, including management, marketing, finance, accounting and human resources, and the degree of difficulty on par with a second-year business term project. The case will not be released to the teams until Friday morning.

## OVERVIEW

An overview of the competition and events is as follows:

- Teams will arrive Thursday afternoon and attend a keynote address during a formal dinner launch. A random draw will determine team name, the order in which teams will present on the final day of competition and the order in which teams will ask questions during the live case Q&A.
- Teams will be presented with the case Friday morning, and then guided to their respective break-out rooms (e.g., classrooms) by a host representative, where they will work on their case throughout the day. A live Q/A session will be held with the organization(s) between 1pm and 2pm.
- Teams will present their recommendations using a Microsoft PowerPoint presentation before a panel of judges on Saturday morning.
- Judges will announce the top three teams during a closing awards luncheon at the hosting institution on Saturday.

## Case Selection

The case selected for the competition:

- Shall be delegated to a sub-committee of the Alberta Deans of Business
  - Sub-committee to be comprised of three Deans (or their delegates), one from the past host institution, one from the current host institution and one from the next host institution.
- Shall be one not previously distributed or used at another case competition.
- Shall contain elements from business stream courses, including Management, Marketing, Finance, Accounting, and Human Resources as applicable.
- Shall have a degree of difficulty on par with a second-year business term project.
- Will not be released to the teams until Friday morning.

## Case Preparation

All teams will prepare the case during Day Two (Friday) of the competition. Teams will then present their case on Day Three (Saturday) in the sequence determined by the random draw on Thursday evening. Teams have all day of Friday, from 8:30 a.m. through 6:00 p.m., to analyze the case, then research and prepare their final recommendations.

The hosting institution will provide each team with a workroom on campus, or at a suitable site located close to their campus, during the preparation period. Teams will be provided with full internet access and will be required to supply their own devices, including laptop computers. The host institution, at their discretion, may provide additional materials (computers, flipcharts, whiteboards, stationery, and refreshments). The host institution shall inform teams two weeks prior to the competition which materials they will, and will not, provide. Teams are allowed/encouraged to bring their own refreshments if they choose.

Teams are allowed to bring electronic communication devices into the preparation room, but under no circumstances are allowed to communicate with outside parties. Each of the teams will have a team host assigned to them. The team host's responsibility is to escort the team members to their preparation rooms, and to ensure supervision of the team during the preparation period.

No communication is permitted between teams or anyone else outside the team, with the exception of their host, between 8:30 a.m. and 6:00 p.m. Friday. Each member of the team will be asked to sign an acknowledgement of the same just prior to entering their war room on Friday morning.

At the end of the preparation period (6:00 p.m. Friday), teams are required to save a Microsoft PowerPoint file (their presentation) to a flash drive or shared folder (at the discretion of the host institution). The file name is their team name (the name they were given on the Thursday evening). No other material shall be included in the presentation file that would disclose the team's home institution. Access to the shared folder or acceptance of the USB drive will be cut off at 6:00 p.m. Written instructions will be provided with the case as to how to save to the network share folder or otherwise submit presentations.

### **Case Presentations**

Presentations will be given on the hosting institution's campus in a digitally equipped audio-visual room on Day Three (Saturday) of the competition. PowerPoint presentations developed and submitted upon close of competition on Day Two will be downloaded into a central podium computer according to the pre-determined order. Each team member must present a part of the overall case. Presentations will be scheduled between 7:20 a.m. and 12:20 p.m. before a panel of judges, comprising of no fewer than three external business leaders. Only spectators associated with teams who have already presented (or currently presenting) will be allowed in the presentation rooms during the team presentations. No audio will be allowed in the PowerPoint presentations. A remote PowerPoint slide advance (clicker) will be provided for the presentation. The judges will be given a hard copy of the PowerPoint slides, printed three slides per page. A remote microphone will be available for optional use – teams can use it if they want to.

Each team will present their case and then face questions by the panel of judges. As such, each team has a maximum of 12 minutes to present their case. Upon completion of the presentation, the judges will then proceed to question that team for a maximum of five minutes.

During each presentation, a moderator will raise notification signs to the team when they have five minutes and one minute remaining. At the end of the 12-minute period, the moderator will stop the presentation, whether the team has finished or not. At that point, the team's question period will begin for five minutes. The moderator will then advise the judges and the teams when one minute remains and when the time has expired in the question period.

All presentations will be video recorded, and a copy will be provided to all participating colleges/institutions.

The format is as follows:

- Presentations are in order as determined by random draw on Day One – Thursday evening.
- During a team's presentation, the next team will wait outside the room until the end of the previous question period. The team host or designate will monitor to ensure that the waiting team does not discuss the case.

- Members of the audience and coaches (faculty advisors) may not communicate with the teams in any way during the presentation.
- The team host or designate will escort the waiting team into the presentation room upon completion of the preceding team's question period.

### **Judging the Competition**

In the case competition, judging has two functions. The most obvious is to pick the top three presentations. The second function, commensurate with the event, is educative. The business students are acquiring the knowledge and skills that will help them contribute to the business community and economic vitality of the province. To this end, it is very useful if the judges articulate the strengths of the presentations they have picked, and a commentary sheet will be handed back to all the teams (evaluation and commentary forms will be posted to the hosting institution's case competition website.) The commentary provided will help the students as they continue along their educational path.

### **Selection**

- The formation of the judging panel is the responsibility of the Alberta Deans of Business sub-committee that is selecting the case. (See case selection for sub-committee make-up).
- The judging panel shall consist of not less than three external business leaders and one alternate judge.

### **Criteria**

- Each team will be judged based on the content of its presentation, as well as its ability to convincingly present arguments and recommendations to the judges.
- The panel of judges will assess each of the team's electronic submissions and oral presentations, then submit their comments and evaluation sheet to the competition organizers.

### **Procedures**

In order to ensure anonymity of the teams and impartiality of the competition:

- Teams will not be known by their school names during their presentations.
  - Each team will be assigned a fictitious name.
  - Judges will not be informed, nor can any team inform judges during the presentation, which school the team represents.
  - Teams will present using the fictitious team name assigned in Thursday night's random draw. However, individuals are free to use their real personal names in the presentation.
- All teams will analyze the same case.
- Each team will have the same time to prepare their case and to present their solutions and recommendations to a panel of judges from the business community.
- The order of presentations will be determined by a random draw.
- The judges' decision of the top three place finishers will be announced during the closing luncheon on Saturday.

The scoring form is available for download as a PDF document on the hosting institution's case competition website.

## APPENDIX A – COMPETITION OVERVIEW AND RULES

### Teams

- An institution may send up to five students, one of whom will be designated as an associate team member for the competition presentation, and up to two faculty advisors. Additional faculty may attend the event at a cost to be determined by the host institution.
- The competition team is defined as the four students who will present the case to the judges.
- The associate team member may participate fully in the case preparation, but only four students per team are allowed to participate in the presentation phase of the competition. The associate team member may be designated by the team at any point prior to the presentation phase.
- At least two student members must be students who have completed less than 60 credits in their respective business programs. Teams may select members from one, two, and four year programs (certificates, diplomas, baccalaureates). Prior post-secondary experience is not restricted.
- Each team member must be registered as a full-time or part-time student in an undergraduate program at the institution he or she represents.
- In certain circumstances, subject to the approval of the members of the Alberta Deans of Business, prior to the entry deadline, teams may be composed of members from more than one institution.

### Prizes

Prize monies will be distributed to the institution, which will be responsible for distribution to their team.

Prize categories are:

- FIRST PLACE: \$4,000
- SECOND PLACE: \$2,500
- THIRD PLACE: \$1,500

### Role of Faculty Advisors

In the months preceding the competition, advisors are responsible for providing adequate training and preparation so that:

- Students are familiar with the case study analysis approach to complex problem-solving.
- Students are comfortable presenting their solutions and answering questions about their analysis and recommendation.

#### *Friday of the competition*

- From 8:30 a.m. – 6:00 p.m., faculty advisors are not allowed any contact with their team.
- Upon submission of presentation files at the end of day Friday, faculty advisors will be provided with a copy of the case. Faculty advisors are free to help their teams prepare for the oral presentation and question period after 6:00pm on Friday.



## Team Hosts

One host shall be assigned to each team. The role of the host is to provide support to each of the teams from the time they arrive at the competition on Thursday until they depart on Saturday. The specific roles of the hosts are as follows:

### *Thursday*

- Hosts attend the opening social at which time they meet their guest teams.

### *Friday*

- After cases are released at 8:30 a.m., hosts escort their teams to their assigned break-out rooms.
- Hosts ensure all supplies (as provided by the hosts) are in place in break-out rooms.
- Hosts supervise the teams during the preparation period from 8:30 a.m. – 6:00 p.m. During this time, no communication is permitted between the team members and anyone else outside the team.
- Hosts ensure that teams' presentation case solutions are submitted electronically (USB device), per the case instructions, no later than the 6:00 p.m. deadline.

**Note:** *Each team's presentation is submitted electronically per instructions provided with the case. After the case has been submitted, and other materials returned to the team hosts, each team will be given a copy of their submission so they can work on their presentation for the next day.*

### *Saturday*

- During oral presentations, hosts will wait with their teams outside the main room until the current team's presentation and question period has concluded. If the current team's presentation is audible, the host ensures that the waiting team does not discuss the case.

## Detailed Agenda and Rules

### **Friday – Analysis Day:** LIVE CASE FORMAT

- At 8:30am following breakfast for student team members ONLY, representatives of an organization(s) will introduce a live business case scenario then lay out the problem statement to be considered.
- Once the case is presented and supporting documentation distributed, team hosts will escort each team to a separate break-out room in which they will conduct their case analysis.
- Electronic recording of any kind is not permitted during presentation of the live case. Student team members should be prepared to take hand-written notes to support case materials provided in hard copy.
- Teams may perform case-related research on the web once they have received the case and been sequestered in their break-out rooms; however, team members are not allowed to email or engage in any other outside communication until their presentation has been submitted at 6:00pm that evening. Team members will be asked to sign an acknowledgment of the same on Friday morning.
- Teams will provide their own laptops and are permitted to bring other electronic devices to the breakout rooms.
- It is strongly recommended that teams bring appropriate cabling to connect their own laptops to an HDMI display screen during case analysis and solution preparation.
- Lunch will be made available at approximately 12:00pm.

### Live Question and Answer session with the organization(s) - 1:00pm-2:00pm

- Student team members will be escorted by their host to a room along with all other teams for a Q&A session with representatives from the organization(s).
- Only participating student team members may attend the Q&A session.
- Student team members from all teams will be in the room at the same time to hear one another's questions as well as answers provided.
- Each team will prepare 2-3 questions for representatives from the organization(s) in advance of attending the session. Questions should be geared toward attaining clarification beneficial in the preparation of a team's solution.
- One designate from each team will be invited to ask a single question in an order predetermined through random draw on Thursday evening.
- To ensure all teams have an opportunity to ask their question, a time limit of 3 minutes will be strictly enforced for each question to be asked and answer provided. Remaining time may be used for an additional question by the team(s) randomly drawn by representatives of the organization(s).
- Microsoft PowerPoint only presentations will be submitted at 6:00pm as directed by the host institution. No other program formats will be accepted.
- A USB Drive will be provided for each team.

- Team members should confirm that the submitted file opens from the USB drive before leaving. No hard copy of the PowerPoint will be made available.
- Once teams have submitted their case solution, the content is fixed, and no further changes can be made to the presentation submission. At this point, faculty advisors will be provided with a copy of the case.
- After 6:00pm on Friday, advisors and their teams (including the associate team member) are free to discuss the team's submission and prepare for Saturday's presentation.

**Note #1:** *Participants may not gain assistance in any form from any other person including, but not limited to, faculty advisors, instructors, family, friends, or personal contacts of any kind whose ideas are not publicly available (ie. published online). Participants may not contact any representatives or staff of the organization(s) presenting the live case.*

**Note #2:** *Team members and faculty advisors may be required by the organization(s) to sign non-disclosure agreements.*

### **Saturday – Presentation Day:**

- Presentations will be given in a digitally equipped audio-visual room.
- Presentations developed and submitted upon close of competition on Friday will be downloaded into a central podium according to the pre-determined order.
- Presentations should be based solely on the contents of the solution submitted Friday at 6:00 p.m. In short, the emphasis for this phase of the presentation is on delivery.
- In Saturday's presentations, judges will disregard any new content not contained in Friday's submission.
- No audio will be allowed in the PowerPoint presentations.
- Presentations are in order as determined by random draw on Thursday evening.
- Each team member must present a part of the overall case.
- Presentations will be given between 7:20 a.m. and 12:30 p.m. before a panel of judges, comprising of no fewer than three external business leaders.
- Spectators will only be allowed in the presentation room during and after their team's presentation. Teams who have completed their presentation are allowed to watch after they have presented.
- Members of the audience and faculty advisors may not communicate with the teams in any way during the presentation.
- Each team has a maximum of 12 minutes to present their case.

- Upon completion of each case presentation, judges will have a period of five minutes to ask questions and clarify their understanding of the team's solution.
- During each presentation, the moderator will raise the notification signs to the team when they have five minutes remaining and then again when one-minute remains.
- At the end of the 12-minute period, the moderator will stop the presentation, whether the team has finished or not. At that point, the teams question period will begin for five minutes.
- The moderator will then advise the judges and the teams when one minute remains in the question period and again when time has expired.
- All presentations will be videotaped. A copy will be provided to all participating institutions.

## **APPENDIX B – FREQUENTLY ASKED QUESTIONS**

- Who is eligible to compete?
- Do I have to be a full-time student?
- How many students are on a team?
- What is an associate?
- Why would a team want an associate?
- Are there any restrictions regarding diploma versus degree programs?
- How much does it cost?
- What about meals?
- How does a team prepare for the competition?
- What if our school doesn't have a case study course?
- How long does a team have to prepare their case?
- What happens after the case is prepared?
- How long is the oral presentation?
- What is the focus of the oral presentation?
- Why might I want to get involved in this?
- How many faculty advisors can my team have?
- During the competition, can faculty advisors help team members analyze the case?
- Can we change our PowerPoint presentation after it is submitted Friday at 6:00 p.m.?
- What are teams allowed in the breakout rooms?

### **Who is eligible to compete?**

Anyone who is registered as a business student in an institution represented by the Alberta Deans of Business.

### **Do I have to be a full-time student?**

No, you can be registered as a full or part-time student.

### **How many students are on a team?**

Four students are on a team, plus an associate, if desired.

### **What is an associate?**

An associate is a team member that participates in the preparation phase of the competition but not in the formal presentation of the team's case to the judges and audience.

**Why would a team want an associate?**

First, it strengthens the team because it is one more person to help analyze and prepare the case presentation.

Second, you may want to take a first-year student as your associate so that she or he can anchor your team in their second year, as they will be familiar with the process and how the competition works.

**Are there any restrictions regarding diploma versus degree programs?**

No. At least two full-time student members must have not completed more than 60 credits in their program at the time of the competition.

**How much does it cost?**

Participating institutions agree to forward a team registration fee of \$1200 to the host institution. Upon receipt of the team registration form an invoice will be sent for payment. Additional faculty advisors/mentors/guests are welcome at a cost determined by the host institution.

**What about meals?**

The following meals will be provided:

*Thursday*

- Banquet Dinner (plated or buffet style. This is up to the discretion of the host institute).

*Friday*

- Buffet Breakfast
- Lunch (for participants only)
- Teams are required to make their own arrangements for the Friday dinner. Although the host institution (at its discretion) may provide a meal.

*Saturday*

- Buffet Lunch

**How does a team prepare for the competition?**

Either as part of your formal course work, or informally with a faculty advisor, a group of students learn the case study approach. Then, by analyzing business cases, they put the theory into practice.

**What if our school doesn't have a case study course?**

You need to ask one or more instructors to help you prepare for the competition outside of normal class time. The rewards are immeasurable. Learning and applying problem-solving methodology is a highly valued business skill and one that goes with you when you graduate.

**How long does a team have to prepare their case?**

Teams have from 8:30 a.m. to 6:00 p.m. on Friday of the competition to analyze the case and prepare their PowerPoint presentation.

**What happens after the case is prepared?**

After 6:00 p.m. on Friday of the competition teams may work on the oral presentation that will accompany the PowerPoint slides. Faculty advisors can work with their teams to prepare the oral presentation.

**How long is the oral presentation?**

12 minutes, plus a five-minute question period.

**What is the focus of the oral presentation?**

The focus is on communicating how and why your proposal will solve the most important or urgent problems you have discovered in the case material. You must convince a panel of judges of your solution's ethicalness, suitability and chances of success.

**Why might I want to get involved in this?**

It may be one of the most challenging and rewarding experiences of your college career. You will grow in self-confidence by trying new things. Self-confidence is based on knowledge of your own capabilities. The more you do, the more you know you can do, and the greater your ease in doing things.

**How many faculty advisors can my team have?**

Each team can bring one or two faculty advisors to the competition.

**During the competition, can faculty advisors help team members analyze the case?**

No, each team is on its own during the case preparation period from 8:30 a.m. to 6:00 p.m. After 6:00 p.m. on Friday, faculty advisors are free to go over the PowerPoint presentation the team has submitted and can help the team prepare the oral presentation for the next day.

**Can we change our PowerPoint presentation after it is submitted Friday at 6:00 p.m.?**

No, the version that is submitted at 6:00 p.m. on Friday is the one that the judges will see on Saturday and the one that will be loaded for your presentation.

**What are teams allowed in the breakout rooms?**

Teams can bring in stationery and electronic devices to help them with their research and preparation of the presentation. Teams may also bring their own refreshments. The host institution may also provide additional items like a computer, stationary, and refreshment.