

Debriefing Best Practices Checklist

This checklist is designed to help you build an effective process for marking and debriefing your case responses. Feel free to adapt the suggestions to suit your personal study routine.

1. Step Away Before Debriefing

- Allow yourself several hours after writing a case before starting the debrief
- Ideally begin the debrief process the following day
- Creating space between writing and reviewing your case response helps you to approach your response more objectively

2. Gather All Debrief Materials

- Open the blank Excel feedback guide for the practice CFE case
- Open your Word case response
- Open your Excel case response

3. Self-Mark Your Case Response

- Review each Assessment Opportunity (AO) in the feedback guide with impartiality
- Review the requirements for Reaching Competence (RC) and Competence (C) for each AO
- Highlight the areas where you earned marks (RC and C)
- Identify the AOs that marked as Not Addressed (NA) or where you demonstrated Nominal Competence (NC)
- Flag the AOs where you spent unnecessary time in your analysis
- Note the AOs where key elements were missed
- Document areas where your technical knowledge needs improvement

4. Review Debrief Notes

- Read the case walkthrough (annotated case)
- Identify triggers in the case narrative that relate to each AO
- Review the technical requirements associated with each AO
- Read common issues encountered by candidates in the case
- Study the sample strong case response to understand how technical concepts were integrated to the case facts
- Consult the CPA Canada Learning Library e-books for deeper technical explanations
- Review undergraduate level resources if want to review technical material beyond e-books
- Examine the areas you need to work on to upgrade your mark to a C level
 - Case writing → Reading, planning, outlining, quantitative and qualitative analyses, recommendations and conclusions
 - Time management

5. Review the Practical Solution

- Skim the practical solution to understand the full scope of possible responses
- Identify quicker or more efficient ways of addressing AOs
- Look for templates or structures you can use to improve accuracy and efficiency in your quantitative analysis
- Use the practical solution to fill gaps where you did not reach RC or C
- Check if you spent too much time addressing certain AOs to the detriment of other AOs (especially in AOs where you may have received a Competency with Distinction grade)
- Remember: the practical solution reflects an ideal version— not the standard expected during a timed exam
- Remember: you should write all practice cases in “**Exam-like conditions**”

6. Update Your Tracking Guide / Performance Tracker

- Transfer your marks into your tracking guide / performance tracker
- Record patterns, recurring weaknesses, and technical areas needing improvement

7. Review External Feedback

- Go through any individual feedback comments received (written and audio)
- Compare the assessor’s marks with your own self-assessment
- Identify areas where you need to focus to improve (e.g., NA/NC → RC, RC → C)
- Add key feedback and learning points to your tracking guide / performance tracker
- Monitor your progress for increased alignment and obtaining more RCs and Cs over time

8. Personal Self-Care

- Make debriefing a priority while maintaining a healthy balance
- Schedule sufficient time to complete each debrief thoroughly
- Prioritize rest and take time to recharge
- Avoid thinking or talking about accounting outside of scheduled study hours
- Spend time with family and friends to maintain perspective and support your well-being

The CPA Western School of Business wants to thank the prior Successful CFE writers who contributed to providing the suggestions above!