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CASE RESEARCH FOUNDATION PAUL R. LAWRENCE DOCTORAL STUDENT AND JUNIOR FACULTY FELLOWSHIP PROGRAM

The Case Research Foundation promotes awareness, development, and dissemination of case research, writing and teaching through the provision of scholarships, grants, and more. Currently, the major activity of the CRF is administering the Paul R. Lawrence Fellowship Program. This program provides fellowships to doctoral students and junior faculty in the first three years of a tenure-track or equivalent appointment to be trained in case research, writing, and teaching at the NACRA annual meeting. Founded in 2014, this is the sixth year of the program's operation.

In 2020, the Case Research Foundation awarded fellowships to:

Name	Country	Institution
Samira Fallah	Iran/USA	University of Mary Washington
Adeniyi Olarewaju	Nigeria/Mexico	Tecnológico de Monterrey
Stanley Lim	Singapore/USA	University of San Diego
Aditee Prabhakar	India/Kazakhstan	Indian Institute of Engineering Science and Technology, Shibpur

The Case Research Foundation (CRF) was founded in 2014 as a nonprofit public benefit corporation. The first fellowships were awarded at the 2015 NACRA Annual Conference. The CRF is a 501(c)3 organization. Donations to the Foundation are tax-deductible, to the extent allowed by law. For more information on the program and how to donate, please go to www.caseresearchfoundation.org.

The Case Research Foundation thanks Emerald Publishing, Ivey Publishing, and SAGE Business Cases, as well as the many individual donors who have generously supported the work of the Case Research Foundation and its fellowship program this year.

START-UP CASES WORKSHOP

Track Chair: Linda Swayne, University of North Carolina Charlotte

Track Co-Chair: Rebecca Morris, Westfield State University

Mentors

We thank the following Mentors for reading, reviewing, giving feedback and guiding the round table discussions for participants who are learning the art and craft of case writing.

Sivakumar Alur, Vellore Institute of Technology Business School
Maria Ballesteros-Sola, California State University - Channel Islands
Christopher Cassidy, Sam Houston State University
Eric Dolansky, Goodman School of Business
Andrew Fergus, Thompson Rivers University
Janis Gogan, Bentley University
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Javier Silva, IAE Business School
Ram Subramanian, Stetson University
Miriam Weismann, Florida International University

Case Author(s)	Start-Up Case Title
Adeniyi (Niyi) Adekanla	Social innovation and youth entrepreneurial interest in Nigeria: A case of student cooperative movement initiative
Anahit Armenakyan	Nairian skin-care for real people: International expansion
Heidi Bertels Elizabeth McCrea	Restaurants scrambling to pivot in the wake of Coronavirus: The case of BXL Zoute
Evgeny Yu. Blagov Vitaly I. Cherenkov	End of the chapter: Three decades on the hard way from invention to innovation
Sarah Clinton Zach Caldwell	The Progressive Corporation – Forward progress

Case Author(s)	Start-Up Case Title
Vinit Vijay Dani Sridhar Iriventi	GoBhaarati - Contributing in the "Journey of Healthy Living"
Carmen Echeverria Pablo Hernandez Juliana Toro	Ethical culture in organizations: Autopasion case
Nada Elnahla Leighann C. Neilson	Surveillance in retail: Meeting customer needs
Prescott Ensign Jeeshan Mirza	Strategic direction for a Sri Lankan apparel venture
Ingrid Erickson Devanish Khakhar	Razorpay grows with razors: The challenges of scaling organizational culture
Samira Fallah Azade Sbaz	Aftershocks of CEO activism: The case of Crossfit CEO
Patrick Hillberg Subathra Ravi	Decomposition creates dysfunction
Janet Howes	Hurt by hurled t-shirts
Bok Jeong Sara Compion	Social enterprise and women's leadership in Africa: Cases of Heartfelt Project, Chikumbuso, & Bright Kids Uganda
Dipali Krishnakumar Madhvi Sethi	Oh No! The books are cooked: A case of accounting manipulation
Stanley Lim Joe Kalra	David & Goliath: How a micro-business stood up to a big supplier
Frank Marshall Randal Schober	Recruiting challenges at Blue Collar Employers: Hiring millennials
Kavya Mohan P. Varsha Pariahar Abhishek Totawar Nidheesh Joseph	Snapdeal 2.0: Story of a comeback
Agnijita Mukherjee Madhupa Bakshi Soumya Sarkar	Lockdown shorts: A "window" into innovative audience engagement?

Case Author(s)	Start-Up Case Title
Ade Olarewaju Ogechi Adeola Luis Gonzalez Lopez	Rutopia: Reimagining ecotourism through effective marketing communication
Pedro Osorio	Profitability of association contracts in the midst of the crisis
Tyechia Veronica Paul	The worker bee's dilemma: Move out or move up?
Gustavo Quevedo	I-sports industry for the Peruvian Football Federation 2017
Cynthia Rayner Ncedisa Nkonyeni	The Impact Bond Innovation Fund
Raul Rosales Daniela Chiri	Westin in PanAmericanos
Andrea Samaniego Diaz Adriana Amaya Rivas Johanna Pelay Fajardo	Skippify—The frictions faced during its scaling-up process
W. Scott Sherman Randall Harris	Dark days at Boeing: Leading amid internal and external chaos
Tamanna Chauhan Urusha Thapa Christian Slough Garima Sharma Wellington Spetic	Environmental sustainability at Taos Ski Valley
Scott Springer	Conflict and change at a remote accounting firm
Sebastian Suito	The Peruvian Institute of Sports: Healthy communication of a brand
Suneel Udpa	Diablo Consulting, Inc.: Dissension in the ranks
William Wei Grace C. Su Chandler C. Chu	Responding to Covid-19: from lockdown to reopening
Meredith Woodwark	Dr. Collan Simmon: Member of Parliament?

Case Author(s)	Start-Up Case Title
Akbar Zatildaev Aruzhan Mursalimova Almira Amirova Anjan Ghosh	SoLuxe Hotel - Creating core competency through Kazakh-Chinese culture integration
Pawel Ziemianski Robert Nowak	A hard landing: How to quickly recover?
Jack Zilberman	San Antonio Pastry: Reinvented by COVID-19
Victor Valdes Cervantes Pável Reyes-Mercado	Kapter: Search for financing of innovation

ACCOUNTING, FINANCE, AND ECONOMICS CASES

Track Chair: Olga Kandinskaia, Cyprus International Institute of Management

Cases	Authors
A broken wire of Wirecard with cash and profits: Financial misreporting by C-suite executives	Meghna Dangi Gagan Kukreja Nidhi Rathore
The spillover of the coffee: Material misstatements at (Un)Luckin Coffee Inc.	Gagan Kukreja Kawthar Abdulwahab
Morristown Memorial Hospital: The nonprofit property tax exemption debate	Michele McGowan Joseph Lohin Barry Williams
Moody's financial statement adjustments in the analysis of Rite Aid Corporation	Suneel Udpa
Crowd Funding: Launching P2P lending platform in the UAE	Manuel Fernandez
To tender or not: An investor's dilemma in first hostile takeover in Indian IT services industry	Mayank Joshipura Vasant Sivaraman
Vassiliko Cement: Is there a business case for a green energy project?	Olga Kandinskaia
Is this recommendation in my client's best interest? Mutual Fund selection under fiduciary standards	Jan Serrano Marie DeVincenzo
A Vermont banker weighs his options	Susan White Karen Hallows Steve Heston

A broken wire of Wirecard with cash and profits: Financial misreporting by C-suite executives

Gagan Kukreja, College of Business & Finance, Ahlia University
Meghna Dangi, School of Business, AURO University
Nidhi Pallava Rathore, Formerly at Subodh College

Case Objectives and use

This case highlights the failures in corporate reporting and auditor responsibilities in being able to pre-empt the occurrence of accounting scandals. It also raises a point on how can stringent internal controls make it impossible for any misstatement or concealing of relevant information. After working on the case, the students would be able to:

- Understand the reasons behind governance failures in major corporations
- Understand the modus operandi behind accounting scandals
- Assess the importance and role of auditors in unearthing the malpractices in financial reporting
- Evaluate and synthesize generic options to resolve financial distress.

Case Synopsis

Over the past several years, accounting scandals have been making the headlines of mainstream media. These scandals have consistently fooled the stock markets, investors, regulators, and auditors alike. Although our case is under investigation, we tried to explore what went wrong in the Wirecard AG that resulted in financial material misstatements worth €1.9bn. Its primary focus is on corporate governance, a material misstatement of financials, the role of auditing firms (EY), and regulators. These scandals are often outcomes of gaps in internal controls, lack of governance, corrupt C-suite executives, the negligence of auditors, less stringent and ineffective regulations, and lack of proper monitoring by the regulators. This case tries to explain what went wrong in Wirecard AG, which severely impacted investors, audit firms, regulators, and the overall reputation of the nation. The ultimate prices of these frauds are paid by the people who invested their hard-earned savings in it and resulted in a break of trust and disrupts the stock market and economic stability. Although the case is still under investigation and the CEO Markus Braun is on bail, there is dire need to revisit accounting and reporting standards and reexamine the responsibilities of statutory auditors, role of financial regulators and soundness of accounting practices. The focus of this case is on corporate governance, financial reporting and auditing practices.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

The spillover of the coffee: Material misstatements at (Un)Luckin Coffee Inc.

Gagan Kukreja, Ahlia University
Kawthar (Asghar) Abdulwahab, Gulf Researcher

Case Synopsis

On April 2, 2020, Luckin Coffee, a leading coffeehouse chain and coffee company in China, was "freshly roasted" after the announcement of inflation of sales by the COO. The COO and the CEO were terminated. The company appointed a new acting head Guo Jinyi to pave the road again for Luckin Coffee. Nevertheless, before doing so, what failures in corporate governance led to this crisis? What kind of audit procedures should have been implemented to earlier detect the fraud? What should have been done to protect stakeholders? Moreover, what extra measures should the U.S. stock exchange take into consideration before listing foreign companies? What kind of ethical standards must be taught to the students/future executives? How can accounting bodies address such material misstatements?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Morristown Memorial Hospital: The nonprofit property tax exemption debate

Michele M. McGowan, King's College
Joseph R. Lohin, King's College
Barry H. Williams, King's College

Case Objectives and Use

The case can be used in an upper-level undergraduate or graduate (MBA or MHA) class in taxation, business law, nonprofit and governmental management, or healthcare management. The objectives are:

- Recognize the changing nature of nonprofit healthcare organizations and the legitimacy of their tax exemption in respect to their market behavior.
- Analyze the determinants of nonprofit executive compensation and the surrounding debate
- Examine the role voluntary payments in lieu of taxes (PILOT) may play to mitigate litigation.

Case Synopsis

This case highlights the changing role of nonprofit hospitals and their relationship to their tax-exempt status and the communities they serve. Historically, nonprofit hospitals justified their tax-exempt status by meeting community health needs. Over the years, to provide efficient and cutting-edge services, hospitals have evolved to include partnering with for-profit organizations to obtain the financial and technical resources necessary to provide state-of-the-art care. These partnerships and joint ventures between tax-exempt hospitals and other for-profit entities have raised issue regarding the tax-exempt status of nonprofit hospitals making them an increasing target of real estate tax exemption challenges by cash strapped municipalities that contend nonprofit hospitals are paying their fair share of taxes. That is exactly the case when in June 2015, the Tax Court of New Jersey ruled that AHS Hospital Corp. (d/b/a Morristown Memorial Hospital) was not entitled to tax exemption on nearly all its property in the Town of Morristown. In this ruling, the judge pointed to a complex structure in which nonprofit and for-profit interests were inextricably intertwined and the hospital essentially functioned as a for-profit business. In the ruling the judge focused on the operating structure of the Hospital, rather than the amount of community benefit provided, reexamining the “profit test” of the property tax exemption in the State of New Jersey. This decision has a potentially far-reaching impact on hospitals, other nonprofit organizations, and municipal taxing authorities. The uniqueness of this case lies in the fact that the court focused on the operating structure of the Hospital and the reasonableness of nonprofit executive compensation which have significant financial and policy implications for hospitals as well as the broader nonprofit community.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Virtual Conference, October 8-10, 2020. © 2020 by Michele M. McGowan, Joseph R. Lohin, and Barry H. Williams. Contact person: Michele M. McGowan, King's College, Wilkes-Barre PA. michelemcgowan@kings.edu 2020. © 2020 by Michele M. McGowan, Joseph R. Lohin, and Barry H. Williams. Contact person: Michele M. McGowan, King's College, Wilkes-Barre PA. michelemcgowan@kings.edu

Moody's financial statement adjustments in the analysis of Rite Aid Corporation

Suneel Udpa, University of Puget Sound

Case Synopsis

Arlene Webb, a recently hired credit analyst at Moody's Investor Services, had the challenging task of making the necessary accounting adjustments to the financial statements of Rite Aid Corporation as per Moody's August 2018, document, *"Financial Statement Adjustments in the Analysis of Non-Financial Corporations."*

Moody's adjusted a company's reported financial statements to improve analytical insights from the perspective of determining credit risk and to improve the comparability of financial data between peers. Moody's classifies adjustments to financial statements as standard and non-standard. Standard adjustments are adjustments made across all companies and typically reflect distortions introduced in financial statements as a result of GAAP implementation. In addition to standard adjustments, Moody's suggests non-standard adjustments to financial statements of individual companies so that they better reflect the firm's underlying economic reality. Moody's then used the adjusted financial statements to compute credit-relevant ratios that, in turn, determined the company's credit rating.

Arlene's task was to restate the reported numbers by incorporating the accounting adjustments that undid the distortions in the financial statements. Finally, she had to prepare a preliminary credit report for the Rite Aid Corporation for 2019 based on relevant ratios calculated using the restated financial statements.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Crowd Funding: Launching P2P lending platform in the UAE

Manuel Fernandez, Skyline University College

Case Objectives and Use

This case can be used as a class exercise or as an out of the class assignment for applying the various capital investment decision techniques at MBA and undergraduate levels in the courses like corporate finance, financial management, and managerial finance. Participants are expected to have a basic knowledge of cash flows and capital budgeting techniques. The objectives are:

- Understand the construction of cash flows in different scenarios.
- Explain the mechanisms of capital investment decisions.
- Apply the capital investment decision techniques
- Make appropriate investment decisions

Case Synopsis

This case is based on an actual event that took place at the Costa Coffee shop in Silicon Oasis, Dubai in October 2019, describes a social situation faced by the immigrant low income blue collar workers in the UAE. More than 60 percent of this population are ineligible to open a bank account and do not have access to financial services. Mr. Roy and Mr. Umer are quite moved by this situation and quickly senses the challenges and opportunities. It is a huge opportunity to serve the unbanked population by providing them a secure peer-to-peer (P2P) micro-lending platform wherein borrowers and lenders can register to the platform and registered borrowers can apply for a microloan from the registered lenders. Registered lenders will have an opportunity to generate additional income by offering short-term loans to the registered borrowers. Roy and Umer are in the process of analyzing the viability of the proposed project.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Manuel Fernandez. Contact person: Manuel Fernandez, School of Business, Skyline University College, Sharjah, UAE. mfernandez@skylineuniversity.ac.ae

To tender or not: An investor's dilemma in first hostile takeover in Indian IT services industry

Mayank Joshipura, School of Business Management, NMIMS University
Vasant Sivaraman, S. P. Jain Institute of Management & Research

Case Objectives and Use

This case can be used for courses in Mergers and Acquisitions and Strategic Financial Management in modules focussed on structuring, financing and takeover defence techniques in a hostile takeover transaction. The case is appropriate for graduate MBA and EMBA programmes. The objectives are: Learn to analyse a hostile takeover bid from the perspectives of the suitor, target firm's management and a large institutional investor in the target firm; evaluate the probity of a hostile takeover when viewed through economic, legal and ethical lenses; review the structuring, financing, valuation, mode of consideration, legal and regulatory aspects of a hostile takeover; understand the role of the target firm's board in a hostile takeover transaction; and address 'to sell or not to sell' dilemma of a large institutional investor in the target firm in the event of a tender offer given financial and non-financial considerations.

Case Synopsis

On June 14, 2019, Nalanda Capital had to decide whether to tender its 10.6% equity holding in Mindtree Ltd., in an unsolicited open offer made by Larsen and Toubro (L&T) Ltd. Nalanda was the largest institutional investor in Mindtree and L&T's offer to acquire 31% of Mindtree shares was due to open on June 17, 2019. Earlier in March 2019 in a sudden turn of events, Larsen and Toubro (L&T), a large conglomerate with businesses spread across infrastructure, construction, engineering, finance and information technology announced that it had acquired a holding of 20.6% in Mindtree at INR 980 per share. This was from Café Coffee Day's founder, who was the largest shareholder in Mindtree. L&T also announced an intention to acquire Mindtree by making an open market purchase of a further 15% shares and launched a mandatory open offer to acquire 31% of Mindtree shares. It was the first hostile takeover attempt in the Indian IT services industry. This triggered a war of words between the Mindtree founders and the management of L&T. The then Chairman and one of Mindtree's founders said, "I must protect the Tree from people who have arrived with bulldozers and saw chains to cut it down so that in its place, they can build a shopping mall." On the other hand, the CEO of L&T, in an interview with Fortune magazine, said, "L&T is the best home for Mindtree in India." Nalanda, the largest institutional shareholder, came out publicly in support of the Mindtree management and strongly opposed the unsolicited offer of L&T. Eventually, L&T increased its stake in Mindtree to 29% before its tender offer to the public was slated to open. While Nalanda Capital left no stone unturned to convince other investors not to tender their shares to L&T but ask for a better price, unfolding events suggested that L&T would succeed in its acquisition of Mindtree.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual was anonymously peer reviewed for presentation at the NACRA Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Mayank Joshipura and Vasant Sivaraman. Contact person: Mayank Joshipura, School of Business Management, NMIMS University, mhj1975@yahoo.com

Vassiliko Cement: Is there a business case for a green energy project?

Olga Kandinskaia, Cyprus International Institute of Management

Case Objectives and Use

The Vassiliko case is ideal to use in a Financial Management or a Corporate Finance course at the postgraduate (MBA/MSc) level to expose students to a wide range of issues related to the financial planning process. The case may be also used in an advanced finance class at the undergraduate level, especially in the business programmes in the areas of energy management, sustainable production systems, renewable energy sources. The case illustrates the importance of viewing a project as part of a company's strategy, in this specific case as part of the corporate social responsibility (CSR) strategy. In completing this case, the students should be able to:

1. Demonstrate awareness and comprehension of the strategic advantages of green energy projects
2. Create free cash flow projections and evaluate a green energy project using various investment appraisal approaches including NPV and IRR
3. Assess a project's financing options and list advantages of loan financing
4. Appraise the decision situation demonstrating comprehension of both financial and non-financial considerations that would be critical in such a decision

Case Synopsis

The Vassiliko case is a decision case set in Cyprus (EU) in 2018. This case presents an innovative project of a local cement plant undertaken within the company's corporate social responsibility (CSR) strategy to manage the demands for environmentally responsible business practices. This case addresses the reduction of the negative climate impact of the cement industry. In October 2018, Mr Savva, the Deputy General Manager and CFO of Vassiliko Cement Works (VCW), was preparing a feasibility study for a green energy project: Vassiliko Cement wanted to build its own photovoltaics park to contribute to the reduction of carbon dioxide (CO₂) emissions. The VCW was the biggest industrial consumer of electricity in Cyprus. A switch towards clean solar energy instead of continuing to rely on electricity produced using conventional fuels was one of the fundamental principles of the company's recently adopted energy management policy. This project was a perfect fit with the company's CSR strategy. The case is written from a disciplinary perspective of finance: the case requires students to apply the DCF/NPV analysis and to assess the suggested financing options. Mr Savva needed to investigate whether the numbers would be in favour of this green project. If so, this would be in line with the most recent publications of the International Renewable Energy Agency (IRENA) on the matter. *"Should I recommend for the company to go ahead with the Amalas green energy project? Will we do well by doing good? What are the possible risks and how to mitigate them?"* Indeed, the Vassiliko case confirms that the dogmatic view on renewable energy sources as too expensive is outdated. Importantly, by completing this project, the company incorporated in its strategy the 17 Goals of Sustainable Development, adopted by the United Nations - responding to the European targets for climate change and to the responsible management of environmental challenges.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, October 9-10, 2020, Online. © 2020 by Olga Kandinskaia. Contact person: Olga Kandinskaia, CIIM - Cyprus International Institute of Management, 21 Akademias Avenue, 2107, Aglandjia, Nicosia, Cyprus, tel: +357-22462214, email: olga@ciim.ac.cy

Is this recommendation in my client's best interest? Mutual Fund selection under fiduciary standards

Jan Serrano, Francis Marion University
Marie DeVincenzo, Francis Marion University

Case Objectives and Use

The ultimate goal of the case is to give students practice evaluating different mutual funds within a given investment objective, analyzing the data, and effectively communicating their thought process and findings. New regulatory pressure to ensure that financial professionals are completing their due diligence in making investment recommendations to clients makes it important that students entering the field have these skills. This case is best used in an upper level investments course covering portfolio management issues. The case has a difficulty level appropriate for junior or senior level undergraduate investments courses or graduate investments courses. This case should be used after students have covered the basic concepts of evaluating investor objectives and constraints and determining an appropriate asset allocation, and after covering the topic of mutual funds and the return and risk measures used to evaluate portfolio or fund performance.

Case Synopsis

This disguised case, based on actual events, describes a crucial decision facing each and every financial professional providing advice of any kind about retirement accounts. It was March of 2019, two years after the Department of Labor's new Fiduciary Rule was supposed to go into effect. The rule sought to expand the duties of a fiduciary to include investment advice with regard to IRAs. While this ruling was sidelined by the courts, the SEC had stepped in and was devising similar regulations designed to protect investors. Ann had come to Tyler, a newly minted financial advisor, to set up an Individual Retirement Account (IRA). After evaluating Ann's investment goals and financial situation, Tyler determined that a diversified "asset allocation" mutual fund would be the most appropriate investment to supplement her current savings, but his firm offered several different asset allocation funds from a variety of companies. Tyler knew that these funds could be very different in terms of cost and performance, even though they fell into the same category. Tyler knew that to protect his practice and to do what was best for his clients he had to develop a process to select the most appropriate fund for his client from the many mutual fund alternatives that he could offer through his firm. He needed to be able to document his reasoning for making the recommendations in case his motives were ever called into question. Most importantly, Tyler wanted to do a good job for Ann so that she would be happy and recommend others to his practice.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX October 8-10, 2020. © 2020 by Jan Serrano and Marie DeVincenzo. Contact person: Jan Serrano, Francis Marion University, PO Box 100547, Florence, SC, 29502, 843-661-1620, jserrano@fmarion.edu.

A Vermont banker weighs his option

Karen Hallows, University of Maryland
Steve Heston, University of Maryland
Susan White, University of Maryland

Case Objectives and Use

This case is intended to be used with students in an undergraduate International Finance course or students in an MBA finance course studying international finance.

After completing this case students will be able to:

1. Define currency arbitrage and how institutions engage in currency arbitrage.
2. Calculate and illustrate through graphing the value of currency transactions.
3. Describe the impact of changes in interest rates and exchange rates on currency transactions.
4. Describe hedging vs. speculation and how an institution can profit (or lose) from these strategies.
5. Explain why there is an absence of arbitrage in markets and interest rate parity holds, with profit achieved through unexpected exchange rate and interest rate changes.

Case Synopsis

Richard Dayton, a rural Vermont banker finds himself the underdog in negotiations against a Swiss banking giant. He plays tough and beats the giant out of millions of dollars. By all accounts this is a career-making triumph. But a post-mortem analysis questions whether he was really the underdog, and whether he could have gotten more. Now, five years later in 2020, he is CEO of First Vermont Bank, and his senior loan officer has made a loan that has gone bad. Will the strategy he used years previously be successful again? Can he improve on that strategy and create an even better deal for his bank?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Karen Hallows, Steve Heston, Susan White, University of Maryland, College Park, MD 20720. Contact person: Susan White, University of Maryland, College Park, MD 20720, 301-775-7823, swhite@rhsmith.umd.edu.

CASES WRITTEN IN SPANISH

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Cases	Authors
Scotiabank Peru: Algoritmos de machine learning optimizan la captación de talento en posiciones masivas del banco	Jack Zilberman
El último vuelo de LAMIA	Ciro Gómez
FIFA 2019: El mejor entrenador del mundo	Pablo Álamo Juan Parra Sylvia Rohlfers
El Clima no negocia	Josep Lluís Cano Giner Joan Plans Esperabé
Nutripunto y la propuesta de alimentos balanceados para Ubate	Ignacio Osuna
Sicor: Humanización del servicio al paciente	Ernesto Barrera Duque Cindy Pinzon Rios
Cormidom: ¿Innovación o quimera?	Guillem Martí Fernando Barrero
Límones Piuranos	Renzo García Juan López
Méderi: De la Oruga a la Mariposa	Alejandro Torres Alfredo Rodríguez

Scotiabank Peru: Machine learning models to optimize talent recruitment in massive banking positions

Jack Zilberman, Universidad Peruana de Ciencias Aplicadas (UPC)

Case Objectives and Use

This case study has been designed for use in Human Resource Management courses related to topics like people analytics or recruiting, hiring and onboarding employees, in senior undergraduate and master programs, as well as in executive education. It is also recommended for introductory courses on AI for Business or Project Management.

The main topic in this case is “The application of a SML model to optimize the recruitment process of branch tellers (called Service Providers)” as a disruptive way to attract and retain talent in massive positions that matches with SBP cultural fit. The objectives are:

- 1) Assess the strategy of a leading bank against the rapid transformation of the financial sector in an increasingly digital and more globally competitive environment.
- 2) Understand the fundamentals of AI (ML).
- 3) Organize and compare current and expected SP recruitment process (e.g. time, costs, accuracy, ethical constraints, biases, and cultural fit, among others).
- 4) Find out the complexity of HR management: promise vs. reality in AI projects.
- 5) Identify the AI project-related risks to be managed during lifecycle. The Deloitte’s Risk Management Framework (RMF) provides a basic model.

Case Synopsis

In 2018 Scotiabank Perú (SBP) was ranked third for market share, with very good operating and financial indicators, despite the fact that it was competing with three other important banks and was simultaneously concentrating 87% of profits in the banking sector. Antonio Barranco –Vice President of Human Resources (HR) of the Scotiabank Group in Peru– had arrived in Lima from Scotiabank Colpatría in Colombia in September of that year and was highly motivated with his first international challenge. One of the projects that most impressed him was a proof of concept (PoC), which applied Supervised Machine Learning (SML) algorithms in the selection process for tellers, called Service Promoters (SPs). This PoC had matured for six months and was perfectly aligned with the bank’s digital strategy and search for efficiencies. As champion of the SBP project team had to analyze the results of the pilot that was carried out and the next steps to be taken at the meeting to be held on April 3rd. He knew that applying artificial intelligence (AI) algorithms in HR was a very complex matter. Not yet achieving the expected predictability in the short-term retention objectives and already putting a lot of pressure on himself for obtaining results for the business through version 2.0, Barranco realized that they will first have to decide the continuity of the pilot project, so he requested the team to analyze the risks and benefits of the project in three dimensions.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

El último vuelo de LAMIA

Ciro Gómez Ardila, INALDE Business School

Objetivos de enseñanza y uso

Este caso puede ser usado por estudiantes de MBA o en programas de *Executive Education* como introducción al curso de Sistemas de control directivo. Es útil específicamente para tratar el tema de la dificultad de la implementación de la estrategia y la necesidad de establecer adecuados sistemas de control debido a: 1) los sesgos de los miembros de la organización, las fallas en los equipos de trabajo, las deficiencias organizacionales externas e, incluso, factores debidos al azar, y 2) las tensiones organizacionales entre, rentabilidad, crecimiento y control, rentabilidad de corto y largo plazo, y los intereses de los múltiples constituyentes. El caso también podría usarse en el área de Análisis de decisiones en el tema de sesgos en la toma de decisiones. Se espera que, como resultado de la discusión del caso, los estudiantes:

- Reconozcan la importancia de los sistemas de control directivo para el éxito de la empresa y la alta probabilidad de fracaso si faltan.
- Otorguen un alto valor a la adecuada implementación de la estrategia, incluso superior al de la planeación estratégica.
- Sean conscientes de las múltiples tensiones organizacionales que debe manejar un directivo, particularmente entre beneficios, crecimiento y control, entre sostenibilidad de corto y de largo plazo y entre los distintos intereses de los distintos constituyentes.
- Sean capaces de prever las características de las personas, los equipos y las organizaciones que pueden impedir una adecuada implementación de la estrategia.

Sinopsis

La noche del 28 de noviembre de 2016 el vuelo LMI 2933 que transportaba al equipo de fútbol Chapecoense se estrelló contra el Cerro Gordo, cerca de la ciudad de Medellín, Colombia, dejando 71 personas muertas y 6 heridas. La investigación del accidente mostró que el avión se había quedado sin combustible porque no tenía autonomía para la distancia recorrida. Sorprendentemente, esto era de conocimiento de la tripulación y habían pasado cerca de tres aeropuertos en los que habrían podido cargar combustible, pero no lo hicieron. La investigación también mostró que esta era una práctica que se había utilizado anteriormente violando sistemáticamente las regulaciones aeronáuticas internacionales. ¿Por qué una compañía con una buena estrategia empresarial y un aparente éxito comercial viola las más elementales normas legales y de sentido común? ¿Cómo es posible que un empresario, además piloto, llegue al punto de arriesgar su vida y finalmente perderla por ahorrarse unos pocos dólares?

Caso desarrollado para discusión en sesión y no para ilustrar el manejo efectivo o inefectivo de una situación determinada. Enviado para revisión anónima por pares para NACRA 2020. ©

FIFA 2019: El mejor entrenador del mundo

Pablo Álamo Hernández, CETYS Graduate School of Business
Juan Manuel Parra, INALDE Business School
Sylvia Rohlfer, CUNEF Universidad
Mario Dipp, CETYS Universidad

Resumen del Caso

Todos los años, algunos profesionales del mundo del fútbol debían dar su voto en los premios anuales de la *Fédération Internationale de Football Association*, organismo internacional universalmente conocido por su acrónimo FIFA, para elegir al mejor entrenador, al mejor jugador y al mejor gol de la temporada, entre otras categorías.

Uno de los profesionales a quien se le pidió la opinión sobre quién era el mejor entrenador del año para los premios fue Nicolás Lithitx, periodista argentino afincado en Paraguay. En 2019, los tres entrenadores que habían quedado finalistas para recibir el máximo galardón eran Jürgen Klopp, Pep Guardiola y Mauricio Pochettino, todos ellos al frente de equipos de la Premier League. Las casas de apuestas daban a Klopp como máximo favorito. El premio se entregaría el 23 de octubre en la Scala de Milán, uno de los teatros más famosos del mundo.

Nicolás Lithitx, un periodista argentino afincado en Paraguay, fue consultado para dar su voto por uno de los tres entrenadores finalistas. En efecto, debía decidir quién era, a su juicio, el mejor entrenador del mundo ese año. Al periodista debía centrar su atención en los resultados obtenidos por cada entrenador; pero, por otro lado, su intuición le sugería ir más allá de los datos “fríos” para tomar la mejor decisión.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

El Clima no negocia

Josep Lluís Cano Giner and Joan Plans Esperabé, ESADE Business School (Ramon Llull University)

Case Objectives and Use

Los objetivos del caso se pueden dividir en generales y específicos:

Generales:

- Evaluar la dificultad que tiene dirigir equipos remotos a través de videoconferencia, especialmente en una situación de emergencia.
- Comprender la necesidad de asegurar la comunicación tanto en el contenido como en la forma a través de videoconferencias.

Específicos:

- Comprender cuales son los tipos de liderazgo posibles a distancia.
- Tener en cuenta todos los aspectos relacionados con nosotros mismos cuando estamos en una videoconferencia y con los medios técnicos que vamos a utilizar.
- Discutir las implicaciones que puede tener una decisión de este calado.

El caso “El clima no negocia” ha sido diseñado para ser utilizado en cursos sobre liderazgo de equipos remotos. Los profesionales de todas las áreas se pueden enfrentar a la necesidad de liderar equipos remotos a través de medios digitales, en especial por videoconferencias. Al utilizar el medio digital deben tener en cuenta aspectos distintos que no son necesarios en el mundo físico.

El caso puede dirigirse a diversas audiencias. Puede utilizarse con alumnos de pregrado, o de MBA, con distintos perfiles y años de experiencia (de tiempo completo, tiempo parcial o en formatos *Executive MBA*), y en programas ejecutivos, tanto abiertos como *In-Company Training* (ICT).

Case Synopsis

La empresa IMNOLAB, sita en una población de montaña, Villamontes de la Cañada, tiene que enviar un cargamento con un medicamento vital para parar un brote de una enfermedad infecciosa de altísima letalidad que ha surgido hace poco en Filipinas. Es un asunto que aun no ha trascendido a la opinión pública.

El director está trabajando en varios planes para llevar al aeropuerto a tiempo la carga de medicamento que ha de parar el brote, pero la tormenta y el reloj corren en su contra y ha convocado una videoconferencia con su equipo para resolver la emergencia.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8– 10, 2020. © 2020 by Josep Lluís Cano Giner and Joan Plans Esperabé. Contact person: Josep Lluís Cano, ESADE Business School (Ramon Llull University), Av. Pedralbes 60-62, 08034 Barcelona, Spain, +34-93-280-6162, josepluis.cano@esade.edu

Nutripunto y la propuesta de alimentos balanceados para Ubaté

Ignacio Osuna Soto, INALDE Business School

Objetivo del caso y uso

Este caso puede ser usado por estudiantes de MBA, Executive MBA o Executive Education en cursos relacionados con la toma de decisiones tales como análisis de decisiones y finanzas de proyectos de inversión. Teniendo en cuenta lo anterior, el caso es útil específicamente para tratar criterios divergentes de decisión y ubicados en diferentes planos y criterios de evaluación de inversión. Durante el análisis de la situación y decisión resultante, el estudiante deberá: Determinar el enfoque estratégico y las maneras de competir, y cómo un proyecto de crecimiento significativo responde a nuevos retos empresariales y personales de su protagonista; analizar los riesgos e implicaciones que tiene aceptar el proyecto planteado por el cliente tanto desde una perspectiva empresarial como personal, al verse involucrado el patrimonio personal del protagonista, sus objetivos y aspiraciones en la decisión; establecer criterios divergentes para la toma de decisiones y determinar como dependiendo del perfil de quien decide puede darle más peso a unos o a otros. Algunos de los criterios pueden ser económicos (VPN o VAN, Payback Time, TIR), el bienestar y tranquilidad del protagonista, la competencia o la dependencia y riesgo de deserción de los clientes; comprender las dinámicas y retos de un empresario mayor, director y dueño de una pequeña empresa familiar que se enfrenta a un gran proyecto, pero no tiene sucesor que pueda apoyarlo en el mismo; valorar económicamente diferentes alternativas para establecer cuáles criterios son los más idóneos (VAN, TIR o PayBack) para la toma de decisiones y sopesar estos criterios con otros de índole más cualitativa.

Sinopsis del Caso

Luis Currea, de 59 años, era el gerente general y propietario de Nutripunto –empresa dedicada a la fabricación y comercialización de alimentos balanceados para animales-, enfrentaba el reto de decidir si aprovechaba una propuesta para tener un gran crecimiento, mucho mayor al que había tenido en los 18 años que llevaba con la pequeña organización que fundó y dirigía. Su mayor cliente de la línea de alimentos balanceados para ganadería, Jairo Ortiz, quien representaba el 10.8% de las ventas totales de la empresa le propuso hacer a Nutripunto el único proveedor de alimentos para las ganaderías de un grupo de 8 grandes clientes, Jairo incluido, ubicados todos en Ubaté (una población a unas 2 horas al norte de Bogotá, capital de Colombia). La propuesta, según Jairo, consistía en unas 400 toneladas de alimento al mes, algo que comparado con las 150 toneladas que manejaba la empresa, implicaba un crecimiento significativo y unos retos de inversión y gestión también proporcionales. Luis Currea contemplaba cuatro alternativas: La primera fue comprar una nueva planta de producción para atender este proyecto o incluso el volumen total de producción alcanzado. La segunda alternativa que contempló fue la de fabricar el producto en un segundo y hasta un tercer turno. La tercera posibilidad era dedicarse exclusivamente a estos 8 grandes clientes, abandonando a los clientes actuales para atenderlos con la infraestructura actual en unos dos turnos de producción. Finalmente, también se planteó rechazar la propuesta y seguir como iba hasta ahora como la cuarta y última alternativa.

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SICOR: Humanización del servicio al paciente

Ernesto Barrera Duque, INALDE Business School
Cindy Pinzón Ríos, INALDE Business School

Sinopsis

A finales de 2019, Dagnovar Aristizábal, director general y director científico de Sicor, revisaba la evolución del número de pacientes atendidos e identificó que hacía un par de años se atendían cerca de 1.200 pacientes permanentes en los programas de salud para las EPS's, frente a los 300 que se estaban atendiendo a finales de año. Estaba preocupado con los resultados más recientes presentados por la organización, y sobre todo, por el panorama de negocios que se veía en el futuro. La composición del mercado había cambiado frente a las IPS's tradicionales se habían convertido en competidores directos al emular ciertas innovaciones de valor agregado de Sicor en los modelos de atención a pacientes y ya eran ofrecidos a los pagadores (aseguradoras y EPS's) a menores precios.

Aristizábal pensaba que quizás era momento de “reinventar” su modelo de negocio, identificar nuevas oportunidades de crecimiento escalable, incorporar y desplegar nuevas tecnologías para la intervención preventiva en los pacientes, así como rediseñar los programas de atención ofrecidos al mercado. Algunas prácticas recientes consistían en transferir, en parte, el riesgo desde las EPS's hacia las IPS's mediante una figura de capitación de pago fijo por paciente con miras a la atención integral, lo que requeriría la creación de una red vía alianzas entre IPS's y otros prestadores para operar dentro de la figura de las rutas integradas de atención en salud (RIAS). Las opciones planteadas eran: (1) reconfiguración de la propuesta de valor, (2) formar parte de una red como las RIAS, (3) explorar y explotar nuevos mercados. La primera, cambiar el segmento entre los pacientes de la pre-pagada y de las EPS. La segunda podía ser riesgosa para el modelo de negocio de Sicor, debido a que con la contratación con las EPS's había evolucionado hacia una tendencia en la que se transferían los riesgos a las IPS's. La tercera, consistía en explorar y explotar nuevos mercados como la expansión a otras ciudades, al igual que afianzar las ventajas competitivas en tecnología, y el acompañamiento preventivo y de bienestar.

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Cormidom: ¿Innovación o quimera?

Guillem Martí, Barna Management School
Fernando Barrero, Barna Management School

Objetivos y Usos del Caso

El caso “CORMIDOM: ¿Innovación o quimera?” ha sido elaborado para ilustrar a los directivos de empresas la importancia de los criterios de sostenibilidad ambiental, social y económica requeridos a la hora de tomar decisiones que fortalezcan la sostenibilidad del negocio. Resulta especialmente útil para MBA, executive MBA, cursos sobre responsabilidad social y cursos de estrategia empresarial. La sostenibilidad del negocio es un criterio fundamental en toda empresa y debe ser asumido y compartido de forma transversal por el conjunto de la organización. Por este motivo, el presente caso es valioso para todos los directivos, independientemente de su sector o especialidad.

El principal objetivo de aprendizaje del caso es conocer el rol preponderante que tienen los criterios de sostenibilidad en cualquier negocio. Otros objetivos particulares de aprendizaje son:

- Definir los criterios de sostenibilidad ambiental, social y económica en base a los Objetivos de Desarrollo Sostenible (ODS) y conocer su estrecha relación con la sostenibilidad del negocio.
- Analizar los beneficios que las iniciativas sostenibles ofrecen tanto a los shareholders como a los stakeholders.
- Entender el fenómeno de la maldición de los recursos naturales y sus implicaciones para el desarrollo sostenible de la localidad donde se realiza la explotación.
- Determinar el rol de la innovación como factor de sostenibilidad del negocio y las formas de potenciarla dentro de la organización.

Sinopsis

El caso CORMIDOM presenta una situación real que tuvo lugar en el año 2016, en la cual una empresa minera establecida en la República Dominicana ha cumplido exitosamente su plan estratégico y, una vez agotados los recursos minerales, tiene que iniciar la fase de cierre de la mina y disolución de la empresa. Sin embargo, justo antes de iniciar la fase de cierre, los directivos Martin Jones y Jonathan Ruiz plantean al CEO Paul Arndt un arriesgado plan de prospección que podría extender la sostenibilidad del negocio por una década.

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Limones Piuranos

Renzo García Farfán, Universidad de Piura
Juan López García, Universidad de Piura

Objetivos del Caso y Usos

El caso Limones Piuranos puede ser enseñado de manera efectiva a estudiantes o ejecutivos de MBA, en cursos relacionados a dirección estratégica y toma de decisiones. También podría utilizarse en cursos de dirección estratégica de últimos años de pregrado.

Los objetivos específicos de enseñanza incluyen:

- Análisis de entorno general, utilizando la herramienta PESTEL.
- Análisis de entorno específico, utilizando la herramienta de Las 5 Fuerzas de Michael Porter.
- Análisis del modelo de negocio, utilizando la herramienta CANVAS.

El punto principal del caso consiste en evaluar la decisión de inversión en un 40% de acciones ordinarias de una empresa agroindustrial en Perú, realizando un previo análisis del sector, modelos de negocio y rentabilidad histórica de ambas empresas.

Las habilidades que se pretenden desarrollar en el alumno son: análisis de información para la toma de decisiones empresariales.

Sinopsis del Caso

Limones Piuranos es un grupo empresarial agroindustrial peruano, ubicado en la costa norte de este país, dedicado inicialmente al cultivo y venta de limón fresco en el mercado nacional. Bajo el liderazgo de Miguel Fossa como gerente general, la empresa amplió su cartera de productos con el paso de los años, al ingresar a la producción de derivados del limón y, al mismo tiempo, empezó a exportar.

En el año 2015, la mayoría de las acciones de la empresa Sunshine, que operaba en el mismo rubro y con un modelo de negocio similar a Limones Piuranos (pero con productos distintos), es puesta a la venta. Miguel se enteró de ello y, junto a Juan Francisco y al gerente de finanzas, se disponen a analizar la opción de compra, pues Limones Piuranos pasaba por un buen momento económico.

El caso finaliza con la reunión entre Miguel, Juan Francisco y Ángel (gerente de finanzas), quienes una vez más se disponían a revisar la información de Sunshine, antes de decidir si compraban o no el 40% de sus acciones ordinarias.

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Méderi: de Oruga a Mariposa

Alejandro Torres, INALDE Business School – Universidad de La Sabana
Alfredo Rodríguez, INALDE Business School – Universidad de La Sabana

Sinopsis

Para 2008 el Instituto de Seguro Social, institución pública que controlaba la seguridad social, llevaba más de cincuenta años acumulando pérdidas para el Estado Colombiano, que a la fecha superaban los 2 billones de pesos, y prestando una deficiente atención para sus afiliados. Para acabar con tal problema, el gobierno de turno resolvió liquidarlo. Compensar, la Orden Hospitalaria de San Juan de Dios y la Universidad del Rosario asumieron el reto. Se unieron en la Corporación Hospitalaria Juan Ciudad, que luego llevaría la marca Méderi y, contando con el liderazgo de Orlando Jaramillo Jaramillo y su nuevo equipo, tomaron dos de los hospitales más grandes de la red del ISS junto a varias unidades ambulatorias para administrarlos y sacarlos de la profunda crisis en que se hallaban, sin dejar de operar un solo día.

El caso relata una serie de hechos históricos que explican la creación de Méderi, y en último término, constituyen una lista de restricciones para Orlando Jaramillo Jaramillo, presidente de la organización, y su equipo, en cuanto a cómo transformar y optimizar la utilización de los activos físicos y mejorar el servicio que recibían del ISS.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

CASES WRITTEN IN CHINESE LANGUAGE

Track Chair: William Wei, MacEwan University

Track Co-Chair: Haibo Hu, Jiangxi University of Finance and Economics

Cases	Authors
“猪”事可为：正邦生猪养殖业务模式创新 Pig-breeding has a brilliant future: The business model innovation of Zhengbang swine industry	Fucal Lu Jingbo Hu Guanying Lin Haibo Hu Xin Wang Keqin Zhao
婺源篁岭：乡村旅游企业如何打造品牌生态圈？ Huangling village: How to build the brand of ecosystem for Eural tourism ?	Kefa Yu Jingbo Hu Jinrui Meng Ying Yao Dujuan Chen
国企组织政治治理：变革下的 A 公司该如何破局？ Political governance of state-owned enterprise: How should company break the situation under the reform?	Zhijiang Liu Weiku Wu Chunxiao Liu
赣粤高速：组织惰性克服之路能否一帆风顺 Gan-Yue Expressway: Can the way to overcome organizational inertia be smooth?	Dali Hu Zhouyang Tu
立心力行：绿油公司成长之路 Stand by heart: The road to growth for Lyou Company	Min Lo Gaofeng Li Bijun Xie Fan Lini Jie Zhou Jiaqiang Min
当“夕阳”产品遇上“朝阳”产业——江西天仙从产品到文化的转型探索 When "Sunset" products meet "Sunrise" industries: Jiangxi Tianxian's transformation from product to corporate culture	Xin Wang

新冠病毒爆發，台灣公私部門協力大量生產口罩
工具機與口罩的啟示

Taiwan's public and private sectors work together to mass-produce mask machine tools and masks during the outbreak of the Covid-19

Chandler Chu
Grace C. Su
Der-Fang Hung

Pig-breeding has a brilliant future: the business model innovation of Zhengbang swine industry

Jingbo Hu, Jiangxi University of Finance and Economics
Fucai Lu, Haibo Hu, and Xin Wang, Shanghai University
Guanying Lin, School of Management
Keqin Zhao, Teachers College

Case Synopsis

This case is launched in Zhengbang Pig Breeding Business Unit, and shows how Zhengbang to explore, upgrade and optimize the pig breeding business model from scratch when faced with the reduction of the growth space of the feed business and the opportunities for the development of large-scale domestic pig breeding. The case describes in detail the innovative evolution of Zhengbang's pig breeding business model from a breeding farm-led model, self-propagation and self-breeding model, to a "company + farmer" model. What innovative challenges did Zhengbang encounter in the process of business strategy formulation, model selection and strategy implementation? What capabilities mechanisms does Zhengbang use to resolve innovation challenges? This case focuses on the role of business model innovation and ambidexterity capabilities in the process of exploring new businesses. This case will help students understand the business model and development prospects of the swine industry, deepen their understanding of the strategy formulation, selection and implementation of business-level strategies, and also can be used for reference to explore the innovation of business model and the application of ambidexterity ability in new business development.

1. 本案例由江西财经大学胡京波 博士、卢福财 教授、胡海波 教授、王鑫 博士、上海大学管理学院研究生林冠颖和江西师范高等专科学校赵克勤等共同撰写。江西财经大学 MBA 教育学院院长宁亮、正邦集团发展战略总监周国星、养殖事业部总裁助理罗小波等对案例调研和撰写给予了大力支持。作者拥有著作权中的署名权、修改权、改编权。未经允许，本案例的所有部分都不能以任何方式与手段擅自复制或传播。本案例曾受江西财经大学 2019 年“万企调查”项目资助。
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婺源篁岭：乡村旅游企业如何打造品牌生态圈？

Kefa Yu, Jingbo Hu, Jinrui Meng, Ying Yao, and Dujuan Chen, Jiangxi University of Finance and Economics

摘要

近年来，随着国家乡村经济振兴发展战略的深入实施，乡村旅游业以此为契机迅速地发展起来，但中途夭折者数量众多。本案例以一个典型乡村旅游景区江西婺源篁岭为例，描述了其 2009 年-2019 年十年发展历程：由相对单一的景观点，到文旅结合的产品线，最后成多元共生的生态圈。基于资源整合、价值共创和核心能力等理论，分析了篁岭乡村旅游品牌生态圈的演变过程，探究了其如何通过资源整合与编排来完善乡村旅游产业生态链，实现景区核心能力的进阶，最终获取系统性竞争优势。上述案例探究，对类似乡村旅游企业的发展提供了一定的启示和借鉴意义。

①本案例由江西财经大学余可发副教授、胡京波博士、孟金睿和姚颖本科生、陈杜鹃 MBA 硕士生共同撰写，江西财经大学工商管理学院案例中心对案例调研和撰写给予了大力支持。作者拥有著作权中的署名权、修改权、改编权。未经允许，本案例的所有部分都不能以任何方式与手段擅自复制或传播。作者感谢篁岭景区创始人吴向阳先生对本案例的大力支持。

②由于企业保密的要求，在本案例中对有关名称、数据等做了必要的掩饰性处理。

③本案例只供课堂讨论使用，并无意暗示或说明某种管理行为是否有效。

④基金项目：江西省高校人文社会科学重点研究基地项目“江西省乡村旅游目的地品牌塑造机制研究”

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

国企组织政治治理：变革下的 A 公司该如何破局？

刘志江，吴维库，刘春晓

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Zhijiang Liu, Weiku Wu, and Chunxiao Liu, Tsinghua University

案例概要

随着管理学的深入发展，组织政治近几年越来越引发管理学界的广泛关注和研究兴趣，因为组织政治融合了社会学、心理学乃至政治学中的相关内容，具有交叉学科的性质。它就像一双“看不见的手”，对于整个组织的效率和效能来说都有潜在的影响，尤其是在企业快速转型发生组织变革的时期，企业重大战略决策与执行很大可能会受到组织政治的影响。有些组织政治会引起太多冲突，从而消耗企业的大量时间精力应对，对经营和发展不利。组织政治的研究源于在组织环境中发展权力和使用权力的活动或行为。权力在组织环境中是一种非常重要的资源，占有者渴望巩固与扩大权力，依附者渴望获得实际权力或者参照性权力，最终导致组织中产生了组织政治，两种组织权力交织在一起，相互竞争、相互融合。如果把组织权力比作人体的肌肉组织纤维，那么组织政治就好像中医中负责调控人体阴阳五行的精气，二者共同支撑并影响着整个企业的运行。

本文以国企 A 公司的组织变革为情景，对其组织政治问题进行描述，本文的创新之处是结合组织变革的框架去研究组织政治，目的是为了更好的阐释组织变革背景下的组织政治问题，探讨应对组织政治的治理对策，以更好地推进组织变革成效。

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The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020. Contact person: Zhijiang Liu, liuzhj.18@sem.tsinghua.edu.cn.

Gan-Yue Expressway: Can the road to overcoming organizational inertia be smooth?

Dali Tu and Zhouyang Tu, Jiangxi University of Finance and Economics

Case Synopsis

Jiangxi Ganyue Expressway Co.,Ltd. (hereinafter “Ganyue Expressway” or “the corporate”, stock code: 600269) is a monopoly state-owned listed company committed to the construction, operation and management of expressways. For the past few years, due to the influence of the external situations, Ganyue Expressway has tried to realize its business transformation and upgrading by overcoming the organizational inertia, the process of which has been ups and downs and has the typical and symbolic significance of state-owned enterprises reform to a great extent. Overcoming organizational inertia has always been a hot topic in the field of research on organizational reform.

This paper, taking the clue of how Ganyue Expressway overcame its organizational inertia, describes the tortuous process that under the leadership of the chairman of the board, Wang Guoqiang, Ganyue Expressway overcame numerous obstacles and its organizational inertia from multiple aspects, such as the strategic development direction, enterprise management system, enterprise culture, organizational structure changes and reforms, etc. Then it draws an in-depth discussion in academia and business circles on that: Can the organizational inertia overcoming help the traditional resource-monopoly state-owned corporate free themselves from their development dilemma so as to allow them to transform the business successfully?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

立心力行：绿油公司成长之路

李敏、李高峰、谢碧君、闵嘉强、林璠、周洁

Min Lo, Gaofeng Li, Bijun Xie, Fan Lini, Jie Zhou, and Jiaqiang Min, Jiangxi University
of Finance and Economics

摘要

在转型和价值重建的时代，随着社会发展和人们生活水平的普遍提高，健康农产品的总需求急剧增加。农业是个投资周期长、风险大的行业。本案例以绿油公司为对象，通过描述绿油公司的成长历程，探究公司创始人在落后山区人才供应不足，产品叫好不叫座的情况下如何突破，将绿油公司打造成一个可传承，有价值的企业。通过对绿油成长历程的回顾，引导学生应用企业成长相关理论和分析工具，分析企业成长的决定因素、成长模式以及成长形态，探讨面对农业企业成长之困的思考：立心力行，还是改弦更张。

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

当“夕阳”产品遇上“朝阳”产业——江西天仙从产品到文化的转型探索

Xin Wang, Jiangxi University of Finance and Economics

摘要

随着土地资源的日益紧缺，骨灰室内存放的殡葬方式开始被越来越多的人所接受，骨灰室内存放架行业迅速发展。本案例研究的对象江西天仙精藏设备有限公司就是一家专门从事骨灰室内存放架生产的企业。多年来，江西天仙凭借其在技术、质量和工艺方面的优势得到了国内外客户的广泛认可，并成长为中国最大的骨灰室内存放架专业生产企业。然而，面对内外部环境的剧烈变化，江西天仙在其创始人黄新林先生的构思下开始了从产品到文化的转型探索。本案例通过对江西天仙发展历程的回顾与战略转型现状的素描，引导学生应用战略转型相关理论和分析工具，分析企业战略转型的动因、内容及阶段，探讨制造企业服务化转型中的价值创造和价值流动过程。

1. 本案例由江西财经大学工商管理学院的王鑫、熊小明、潘婷、李勇撰写，作者拥有著作权中的署名权、修改权、改编权。
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新冠病毒爆发, 台湾公私部門協力大量生产口罩工具機与口罩的启示

Chandler C. Chu, Chung-Yuan Christian University
Grace C. Su, McNeese State University
Der-Fang Hung, Industrial Technology Research Institute

截至 2020 年六月, 全球感染新冠病毒的人数已经超过 1000 万人, 这场大型世纪公共卫生危机不仅在全球散布, 也造成了全世界经济与日常生活的重大改变。许多国家不仅关闭了日常社交与公共生活, 校园被封锁, 人们被迫在家工作。国际旅行人数也减少了超过 80%, 许多国家的医疗体系也面对重大压力, 医院人满为患, 呼吸器严重不足, 医疗物资如又罩严重缺乏。各国政府面对新冠病毒的公共政策与执行方式各不相同。作为新冠病毒爆发的起源国, 中国政府试图掌握一切资源与管理措施, 不仅控制病毒的爆发与传播, 也控制輿論。中国政府进行了雷霆万钧的大规模封城, 完全停止了公共活动, 民众被迫待在家里, 学生无法上学, 人员无法在省际之间的旅行。在医疗救护上, 中国政府自己投入大量的资源以及人力, 建设方舱医院, 并以公权力的方式要求具有公务员身份的医事人员务参与救灾。截至 2020 年三月初, 中国新冠病毒的传染扩散数量进入稳定期, 不再出现大规模的社区传播。相对于中国在三月初就控制了病毒的传播, 新冠病毒却从三月开始在美国爆发大流行。2020 年三月二日, 美国官方统计的新冠病毒感染人数为 52 人, 但六月三十日, 官方统计的人数已经超过 260 万人。

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

CORPORATE GOVERNANCE AND ETHICS CASES

Track Chair: Vi Narapareddy, University of Denver

Track Co-Chair: Erica Berte, Metropolitan State University

Cases	Authors
Failure by design: Boeing and the 737 Max crisis	Randall Harris Vanessa Hill Anne Lawrence
A rulebreaker at Magnolia SDN BHD: Whether to punish or not to punish...!	Farzana Quoquab Mohammad Jihad
Museum Square Apartments	Glenn R. Williamson
Amazon Inc. and New York: The rise and fall of HQ2	Francois Mangin
Who is responsible for the US opioid crisis?	Francois Mangin
Life Esidimeni: Ethical failure and the struggle for accountability in the South African public health service	David Schmidt Claire Barnardo Marianne Camerer
Coronavirus crisis: An ethical dilemma in the hospital	Monica López-Sieben Jaime Alonso Gómez Pablo Álamo
Women of Nike revolt: A case study	Julie Nelsen
DymiumData: The name changes the game	Roberto Santos Shreya Patel

Failure by design: Boeing and the 737 Max crisis

Randall D. Harris, Texas A&M – Corpus Christi
Vanessa D. Hill, University of Louisiana at Lafayette
Anne T. Lawrence, San José State University (Emerita)

Case Objectives and Use

After reading, analyzing, and discussing this case, students should be able to:

- Define the key strategic issues, both internal and external, faced by Boeing CEO David Calhoun as of Monday, January 13, 2020.
- Evaluate the culture of the Boeing organization and draw conclusions regarding the origins of the cultural changes at Boeing that contributed to the production of an unsafe aircraft, the 737 MAX.
- Examine the regulatory environment of Boeing, particularly Boeing's relationship with the Federal Aviation Administration (FAA), and draw conclusions regarding how the regulatory relationship between the FAA and Boeing contributed to the production of an unsafe aircraft.
- Formulate a crisis management plan for Boeing, based upon best practices.
- Design an action plan for the company to return the 737 MAX to service and repair the financial and reputational damage to the company.

Case Synopsis

It was Monday, January 13, 2020, David Calhoun's first day on the job as president and CEO of The Boeing Company. In the prior fifteen months, two separate Boeing 737 MAX planes had crashed, killing 346 people. In the wake of the second crash, civil aviation authorities had grounded all 737 MAX planes worldwide. Something had gone terribly wrong with Boeing's newest and best-selling airplane, throwing the company into a profound crisis.

What aspects of the company's strategy, culture, or governance had contributed to the production of a flawed aircraft? Had external regulators failed to properly oversee the certification of the plane? What should Calhoun and his management team do to correct the problems that had led to the crisis? How could he best restore the company's reputation, repair relations with its stakeholders, and return the 737 MAX to worldwide service? What was the path forward for Boeing?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, to be held remotely on October 8-10, 2020. All rights are reserved to the authors and NACRA. ©2020 by the authors. Contact person: Randall Harris, Texas A&M University – Corpus Christi, 6300 Ocean Drive, Unit 5808, Corpus Christi, TX, 78412-5808, Randall.Harris@tamucc.edu

A rulebreaker at magnolia SDN BHD: Whether to punish or not to punish...!

Farzana Quoquab, Universiti Teknologi Malaysia
Jihad Mohammad, Qatar University

Case Objectives and Use

The case is suitable to be used in business ethics course for BBA and MBA students. Students/participants are challenged to identify the major issue in the case and help decision maker to make decision. Using this case, students can learn the practical dilemma of a small e-retailing firm in handling the ethical issues pertaining to employee misconduct.

The objectives of using this case are as follows:

1. To apply the major ethical theories such as deontology, utilitarian theory and virtue theory to situations that involve ethical issues.
2. To analyze the concept 'moral responsibility' pertaining to the ethical dilemma.
3. To explore the concept like bureaucracy, code of conduct and centralized decision-making process which directly and/or indirectly affect the ethical environment of an organization.
4. To analyze strategic approaches to handle 'employee misconduct' and to find a possible solution for a complicated situation to solve the conflict aroused.

Case Synopsis

This case describes a sensitive situation that Bryan Teoh, the co-founder of Magnolia Sdn. Bhd faced challenge to handle one of his experienced and efficient senior programmers Ritwik's misconduct. Magnolia, a Malaysia based company which was established in 2011 sells online beauty products. During Bryan's short trip to UK, Ritwik published the modified website without getting the consent of the top management. Since 2014, it became a rule in Magnolia to get permission from the top management before any new or modified website could be launched. Bryan realized that Ritwik did not have any bad intention to disobey the company practice. However, being concerned of the internal gossip among employees on the matter and to prevent the risk to break the company rule in the future, Bryan decided to bring this matter to the top management's concerns. He was in a clear dilemma – if the top management decides to punish Ritwik for his misconduct, Ritwik may leave the job or may lose his work motivation which may affect his work productivity. Again, if they do not take any action against Ritwik's such behavior, other employees may lose their trust on Magnolia's fair treatment towards employees and may disobey the company rules and regulation in the future. He was wondering what could be a possible way to handle this situation – neither he wants to lose an efficient and senior employee like Ritwik, nor he wants to allow any employee misconducts in Magnolia.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. Names of people and institutions have been disguised. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 8-10, 2020. All rights are reserved to the authors and NACRA. © 2020 by Farzana Quoquab and Jihad Mohammad. Contact person: Farzana Quoquab, Universiti Teknologi Malaysia, KL, Malaysia. fqbhabib@ibs.utm.my

Museum Square Apartments

Glenn Williamson, Georgetown University

Case Objectives and Use

This case can be used in graduate or undergraduate Ethics, Real Estate, and/or Urban Planning courses. Students can respond individually or within teams representing various stakeholders. Graduate students with a greater understanding of finance and construction can ‘dig in’ to the calculations necessary to determine solutions that would be feasible - financially, legally and physically - for this particular site. For undergraduates, a more general discussion of the issues raised might focus on the interests and goals of the parties and a more theoretical negotiation of potential ‘win-win’ solutions. The objectives are:

- To identify interests, goals, rights and responsibilities of four stakeholders - owners, tenants, DC officials and a rival developer – and to explore any common ground.
- To foster listening, negotiation and leadership skills within each group as well as among groups.
- To determine whether workable compromises can be achieved that would satisfy all parties.

Case Synopsis

By 2018, John Powers wondered aloud if anyone would ever redevelop this Washington, DC site that had just been put on the market. As VP of Bush Construction, Powers had built the 300-unit Museum Square Apartments building on behalf of its affiliated owner back in 1980, during a much less affluent time in DC history. Recently, the Mount Vernon Triangle neighborhood had boomed all around, bringing new apartments and businesses while this building slowly deteriorated. Apartments were only half-occupied; and while remaining low-income tenants wanted to stay, Powers thought it made little financial sense to maintain a narrow 10-story structure and its adjacent parking lot. High-density zoning established in 2004 allowed for two 13-story buildings that would result in more than double the number of units. But what about the existing low-income tenants? Where would they go? DC’s Tenant Opportunity to Purchase Act (TOPA) gave tenants the right to match any price set by the owner or any offer made by a new buyer. In 2014, the tenants had challenged the owner’s price of \$250 million as not being “bona fide” under TOPA. They won in DC Superior Court; and in 2016, the owner lost the appeal. Tenants continued to rent their apartments using DC vouchers; but the owner was not signing new leases and 50 former tenants had taken their vouchers elsewhere. Many elderly Chinese residents – and DC officials – were concerned over further erosion of the shrinking identity of nearby Chinatown. Powers understood the on-going need for affordable housing across the region, but he felt Parcel One had met its contractual obligations to provide affordable housing for 40 years. It didn’t seem fair. Chinatown had undergone massive redevelopment along with Mount Vernon Triangle. Why shouldn’t this site benefit from zoning rights enjoyed by all the other properties?

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Glenn Williamson. Contact person: Glenn Williamson, Georgetown University, Master’s in Real Estate Program, School of Continuing Studies, 640 Massachusetts Avenue NW, Washington, DC 20001, (202) 784-7364, glenn.williamson@georgetown.edu.

Amazon Inc. and New York: The rise and fall of HQ2

François Mangin, NEOMA Business School

Case Objectives and Use

This case can be used in undergraduate or graduate Corporate Social Responsibility, Project Management or Corporate Strategy courses. This case provides insights and data for

- Illustrating stakeholder engagement objectives and challenges;
- Applying classical analytical tools, typologies and matrix for representing the specific interests, stakes, objectives and strategies of a large number of stakeholders;
- Introducing two specific contexts for stakeholder management: project and controversy, and illustrating the way a project slip to controversy;
- presenting specific processes of controversial situations, as issues and stakes redefining, and the structuring effects these process create, particularly regarding opportunities for alliances and new stakeholders involvement;

Case Synopsis

This case study presents the history of the Amazon new HQ2 project with a focus on what followed the announcement of the selection of New York City.

In less than three months, a one-year long process of careful screening, selecting and negotiating with the state and the city slipped, derailed and ended with the withdrawal of the project among unanticipated criticism from politicians who initially were eager to welcome Amazon. Stakeholders management appears to be a major cause of this failure.

To secure an advantageous and timely process, Amazon engaged with a very limited set of elected officials, considering that, as dominant leaders, they will easily impose their decision on their communities. Added to the confidentiality required by the company, this strategy let Amazon bare, with no direct and fine knowledge of the local stakeholders' expectations, perceptions and feelings, as well as no good understanding of the balance of power between the selected leaders and their constituents. Unfortunately, besides the already controversial company's image, New York communities quickly perceived Amazon's strategy and practices as very arrogant. In this difficult context, a key point of Amazon's global strategy, fighting unionization, appeared as a major red line for many local stakeholders. The political timeline was another point neglected. State elections occurred after the Amazon announcement. The result actually weakened the governor's domination on the state legislature.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the North American Case Research Association (NACRA) 2020 Conference, October 8-10, 2020, Online. © 2020 by François Mangin. Contact person: François Mangin, NEOMA Business School, 1 rue du Maréchal Juin, 76825 Mont Saint Aignan Cedex, France, +33 2 32 82 57 01, francois.mangin@neoma-bs.fr

Who is responsible for the US opioid crisis?

François Mangin, NEOMA Business School

Case Objectives and Use

This case can be used in undergraduate or graduate CSR or ethics courses. The case provides data that provide the opportunity to:

- use stakeholder analysis tools and methods to understand the specific interests, stakes, objectives, and strategies of a large number of stakeholders (pharmaceutical companies, prescribers, regulators, law enforcement bodies and patients)
- illustrate and discuss
 - the differences between philanthropy, ethics, corporate social responsibility, and liability
 - deceptive business practices in the health industry
 - conflicts of interest in the scientific and medical field
 - responsibility issues and specifically: who should support the economic and social cost of bad business and controversial professional practices?

The case can be used as a role-playing game.

Case Synopsis

The case presents a history of the US opioid crisis from the eighties to December 2016, based on contemporary sources. It provides insights on the development and promotion by Purdue Pharma of Oxycontin, a new opioid painkiller. This new medicine gave way to revolutionary changes this new medicine created in pain management.

The case also describes the progressive discovery of the drug's side effects by law enforcement and public health bodies, and the successive lawsuits filed by patients as well as DAs and public institutions facing the huge social and economic costs of Purdue Pharma's blockbuster.

Ethics, corporate social responsibility, and liability issues are deeply interwoven in this crisis. Understanding the causes of such a disaster is the first step to decide what changes are to be implemented in business, regulatory and professional regulations, and practices to actually prevent such a crisis from happening in the future.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the North American Case Research Association (NACRA) 2020 Conference, October 8-10, 2020, Online. © 2020 by François Mangin. Contact person: François Mangin, NEOMA Business School, 1 rue du Maréchal Juin, 76825 Mont Saint Aignan Cedex, France, +33 2 32 82 57 01, francois.mangin@neoma-bs.fr

Life Esidimeni: Ethical failure and the struggle for accountability in the South African public health service

David Schmidt, University of Cape Town, Nelson Mandela School of Public Governance
Marianne Camerer, University of Cape Town, Nelson Mandela School of Public Governance
Claire Barnardo (case manager), University of Cape Town, Graduate School of Business

Case Objectives and Use

This case can be used to enhance the Ethical Leadership and Public Accountability component of Masters programmes within Graduate Schools. It can also be taught in selected executive education and leadership programmes for civil society leaders and senior public servants. Whilst the case is set in a provincial government/health sector setting, there are multiple stakeholders, the issues are cross-sectoral and the case can thus be taught in professional schools of government, business and law. The objectives are to: Define and discuss ethical awareness including ethical blindness; discuss how professional ethics can be subverted by organisational norms and other contextual factors; discuss the strengths and limitations of internal and external constraints on abuses of power that can provide effective oversight and accountability; understand how organisations might create an ethical culture and practice; and evaluate elements of social justice advocacy strategies in countering abuses of power and ensuring public accountability.

Case Synopsis

The Life Esidimeni case addresses the ethical leadership failure in the South African Gauteng Department of Health during 2015-2017 that resulted in the deaths of 144 mental health patients. It has important lessons for ethical leadership in the South African public service. The case is told through a key protagonist Sasha Stevenson, the head of health at the public interest law centre, SECTION27. A year into the fight against the Gauteng Department of Health's move to 'deinstitutionalise' mental health patients, Sasha reflects on how to halt the process and hold the leadership accountable for the debacle. The 1700 patients with severe mental disabilities who had been in long-term care at the Life Esidimeni hospital are being relocated in a cruel, chaotic fashion to ill-equipped community based services. The management and administration of the process of transfer by the Gauteng Department of Health is exceptionally poor. The intense scrutiny regarding the situation from advocacy NGOs, from whistleblowers, the media and opposition parties eventually results in action (although this was too late to prevent 144 deaths). The case identifies various turning points in the journey in the struggle for accountability, from the failed litigation to stop the movement of patients to the roles played by various officials responsible for public health management in the province. It concludes shortly after the release of the Health Ombud's report in February 2017. Sasha reflects after this on the findings of this report and commits to bring about about a public reckoning where leaders will have to answer for what took place so that such a tragedy will never happen again.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Coronavirus crisis: An ethical dilemma in the hospital

Mónica López-Sieben, CETYS Graduate School of Business, CETYS University
Jaime A. Gómez, University of San Diego, School of Business
Pablo Álamo Hernández, CETYS Graduate School of Business, CETYS University

Case Synopsis

The case describes how the coronavirus crisis affected a hospital in Baja California and presents the ethical dilemma faced by the medical director during a critical situation that would involve the life of a person. In the Intensive Care Unit (ICU), a 16-year old teenager, a 35-year old woman, and a 71-year old lady had contracted the COVID-19 virus and needed the only ventilator available in the Unit. Who would receive the ventilator and why? What should be prioritized in this critical situation?

Related Topics:

- General Ethics principles (arts and science)
- Ethical decision-making
- Rationality and emotion in decision-making

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Women of Nike revolt: A case study

Julie Beckel Nelsen, St. Catherine University

Case Objective and Use

The case can be used in an upper level undergraduate, graduate, in-house management training, or executive education course. The case, ideal for business and communications disciplines, allows student to work on the mental rehearsal of dealing with a complex real-to-life situation. With its focus on leadership, management, ethics, and communication issues, it lends itself to work for in a highly participatory, discussion-based teaching strategy focused on students' development of critical thinking, communication, and teamwork skills. It is a type of problem-based learning. The case study is intended to be taught in one class hour and is expected to require approximately 2 hours outside of class student preparation. The objectives may vary by course, but may include exploration of:

- how professed values versus lived values impact workplace culture
- why internal policies are important and require adherence
- why no stakeholder should be overlooked in attempting to manage both internal and external organizational reputation
- how issues evolve over time
- how internal organizational issues become external organizational issues
- how the pursuit of excellence can be derailed by issues not addressed in a timely manner
- how a strong reputation can insulate an organization under crisis

Case Synopsis

This case outlines the progression of a stakeholder issue at Nike Corporation stemming from a reportedly “toxic” culture and the corresponding impacts from not addressing problems before they become public knowledge. A *The New York Times* Nike expose in April 2018, described the Nike culture as “toxic”. For the more than 50 current and former employees interviewed for the article, it was reported to be a place experiencing work culture, harassment, and pay inequity issues. As men advanced more quickly into Nike’s key roles, several high-ranking women began to leave Nike. Concern over these departures led a group of women inside Nike to create and distribute the unsanctioned survey that eventually ended up on CEO Parker’s desk. A few months later, Nike received notice of both a class action lawsuit and a shareholder lawsuit which are still unresolved two years later. Critics believe Nike may have prevented both the internal survey and the lawsuits from occurring if conflicts had been addressed earlier. Nike has been able to keep this issue relatively contained. However, it’s CEO has not been replaced and the lawsuits are still pending.

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Julie Beckel Nelsen. Contact person: Julie Beckel Nelsen, St. Catherine University, 2004 Randolph Avenue, St. Paul, MN 55116, 651-895-4448, jbnelsen@stkate.edu.

DymiumData: The name changes the game

Roberto S. Santos, University of Massachusetts Lowell
Shreya Patel, University of Massachusetts Lowell

Case Objectives and Use

This case is suitable for undergraduate courses in Business and Entrepreneurship. This case illustrates one of the many possible agency dilemmas that entrepreneurs may face in the wake of their own success. This case aligns well with discussions regarding decision-making, corporate governance and intellectual property (i.e., trademark law), but could also be used in different courses, such as financing or public relations. After reading, analyzing, and discussing this case, students should be prepared to:

- Analyze a set of circumstances and determine if any wrongdoing has occurred;
- Evaluate the implications of management decisions on key relationships and company strategy;
- Synthesize an appropriate course of action for companies that face similar media scrutiny.

Case Synopsis

In April, 2019, DymiumData filed its highly anticipated IPO prospectus. Buried within its pages was an innocuous disclosure easily overlooked. It stated that DymiumData CEO Winston Megabucks had purchased the rights to the “Dymium” trademarks from an entity known as Dymium Holdings, LLC for \$4 million. However, Dymium Holdings, LLC was also managed by Megabucks. The DymiumData IPO drew copious media attention, but this new revelation now overshadowed the IPO and Megabucks’ character and judgement were called into question. How could something as trivial as changing the name of the company lead to such blowback? What should Megabucks do now?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Roberto S. Santos and Shreya Patel. Contact person: Roberto S. Santos, University of Massachusetts Lowell, One University Avenue, Lowell, MA 01854, Roberto_Santos@uml.edu

DIGITAL TECHNOLOGIES AND OPERATIONS CASES

Track Chair: Clinton Daniel, University of South Florida

Cases	Authors
‘Aarogya Setu’ – The mobile application that monitors and mitigate the risks of COVID-19 pandemic spread in India	Viral Nagori
MappApp - Case study of software innovation in health care	Maggie Prowse
Guard-Ex Corp. – The race in the cannabis screening device industry: Will Guard-Ex be a winner?	Jane Gravill
Start finishing with flow	Denis Dennehy Kieran Conboy Janis Gogan
The University of South Florida and Tampa General Hospital: Selecting a badging platform	Terry McGovern
Vectra Digital: Capturing artificial intelligence value after adoption	Chrissann Ruehle

‘Aarogya Setu’ – The mobile application that monitors and mitigate the risks of COVID-19 pandemic spread in India

Viral Nagori, MICA

Case Objective and Use

The objectives of the case are: Summarize functions and features of the app designed and developed for monitoring and mitigating the health status records during the pandemic; apply the gamification and in-app reward in the mobile app, which is purely classified as informative to increase the download and engagement; evaluate the privacy policy of the app that collects personal and sensitive information from the user; and design M-Governance scalable platform as a one-stop solution for all information to fight the pandemic. The case can be used in an undergraduate and postgraduate program to teach the subject of Information Systems, Mobile Application Development, and E-Governance. The case can also be used as a pedagogy tool for FPM, Executive Education and MDP program. The case can also be given as an exercise for the Gamification workshop.

Case Synopsis

The case will appeal to the academician, consultant, IT practitioner, and students who are always in the quest for digital technology-based solutions to address real life problems. The case is developed based on the library resources available on the ‘Aarogya Setu’ mobile app launched by the Government of India for the people of India to fight against the COVID-19 pandemic. The case discusses the features of the app and how app functions to monitor and mitigate the risks of COVID-19 pandemic spread in India. The case also throws the light on how the Aarogya Setu has addressed the concerns of user privacy and data-sharing issues. In the end, the case poses the following challenges to the readers.

- i. How should the government encourage people to use the app in the fight against the pandemic without making it mandatory?
- ii. What new features and functions should be added to the mobile app so that it truly becomes a digital instrument in the fight against the COVID-19 pandemic?
- iii. Should the Government of India revisit its privacy policy to bring more transparency and trust in the usage of the Aarogya Setu mobile app?
- iv. How should the Government scale-up Aarogya Setu as a scale platform as an M-Governance initiative to monitor and mitigate the risks of COVID-19 pandemic?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer-reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by [V]. Contact person: [Viral Nagori, MICA, Shela, Ahmedabad, 9898372475, viral.nagori@micamail.in].

MappApp – Case study of software innovation in health care

Maggie Prowse, University of New Brunswick

Case Objectives and Use

The case is situated such that it can be used in an interdisciplinary teaching context or in any one of the three key disciplines touched by the case: design engineering, innovation adoption and law. The objectives are: In terms of design engineering, identify the various design engineering processes and analyze their utility in a software engineering context subject to a market sense of urgency and a product requirement for accuracy; in terms of consumer behaviour: identify the users of the software application and differentiate the users from the consumers/buyers in a nursing home and hospital context respectively; identify the factors that would accelerate user adoption of the innovation and validate the consumer/buyer purchase; in terms of law, identify the fact points that trigger intellectual property laws such as copyright and patents as well as privacy laws in a health care context; and, and in terms of interdisciplinary studies, identify the touch points amongst the three disciplines and how these touch points affect each other in terms of economic opportunities and design diligence.

Case Synopsis

This disguised case, based in part on a combination of actual events, describes a complex apex amongst health care, technology, change management and rapid software design engineering. Nancy was inspired by the COVID-19 death of her Aunt Bea. Now, her own father was infected with COVID-19. Nancy is desperate to help the onslaught of this global health care crisis and leans on her wife, Linda, for support.

Together Nancy and Linda combine Nancy's software engineering skills with Linda's legal practice to quickly, but tentatively, approach Nancy's employer, AppCo Inc. with a software idea of patient mapping within a hospital combined with contact tracing. They call it MappApp for now. AppCo's founder, David, is on board and eager to be part of MappApp's potential. For MappApp to be of any tangible use to the users and consumers, the app must be designed and commercially launched fast. For it to truly save lives by accelerating communication amongst the stakeholders, it needs to be accurate. Due diligence in the design process cannot be sloppy.

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Guard-Ex Corp. – The race in the cannabis screening device industry: Will Guard-Ex be a winner?

Jane Gravill, Conestoga College School of Business

Case Objectives

This case is suitable for undergraduate students and can be used in Information Systems Management or Project Management courses. The objectives are: Understand the role of the Information Systems Testing and Implementation phase within the System Development Life Cycle for Guard-Ex and the options available to the firm; identify the key factors involved in developing optimal System Testing and Implementation plans for the Guard-Ex GX420 project; and develop an implementation plan for the Guard-Ex GX420 device.

Case Synopsis

As Dastiger Khan, CEO of Guard-Ex Corp., sat in his office on a chilly Monday, February 4, 2019 morning sipping his cup of steeped tea he wondered what strategy Guard-Ex should implement to achieve the firm's goal of becoming a global leader in the emerging marijuana screening device industry. Guard-Ex was part of the Waterloo Accelerator Center's JumpStart program located in the Laurier Launchpad incubator within the Schlegel Center for Entrepreneurship & Innovation at the Wilfrid Laurier University, Waterloo, Ontario Canada. The firm had designed and developed their own GX420 cannabis screening device. Khan and his team were meeting that morning to prepare for an important presentation with the Ontario Association of Chiefs of Police the following week. Khan urgently needed to finalize an effective implementation strategy for their presentation as he knew that the Association was expecting to learn how the device would be implemented in the field. Khan reflected upon an article he read recently that indicated almost 70% of most IT projects fail, and many of those project failures were due to poor implementation strategies. He did not want the GX420 to become another statistic. The Guard-Ex team was aware that the implementation phase of the GX420 project would be the most delicate phase of the project, and that their next steps were likely to determine whether the GX420 would become readily adopted in the field and position the firm as a leader in the industry or become a victim of the factor of substitution. The race was on....

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Start finishing with flow

Denis Dennehy, National University of Ireland – Galway
Kieran Conboy, National University of Ireland – Galway
Janis Gogan, Bentley University

Case Objectives and Use

With this case, students can place themselves in the shoes of a new manager facing a complex, multi-faceted socio-technical challenge. An Instructors Manual describes how to use it in an MBA *Strategic IS Management* course, and it is also suitable for executive programs or a high-level undergraduate *Business Information Systems* (BIS) course. The case provides a brief history of software development; shows the connection between lean manufacturing and lean software engineering; and offers students an opportunity to consider Flow as a managerial innovation.

The case supports the following learning objectives: Explain challenges associated with software developers' adoption and use of Flow; explain how and why an IT-enabled management innovation may be adapted by a team or larger organization, during both initial adoption and ongoing assimilation; recognize how and why managers exercise authoritative, coordinated, or trust-based control; and offer actionable advice to a manager charged with successful rollout of an IT-enabled managerial innovation (such as Flow software engineering).

Case Synopsis

In February 2017, the recently-hired Team Manager and Coordinator of the Flow Project for the Limerick Ireland campus of Dell Technologies, is preparing for a review with Dell's Systems and Processes Improvement Committee, early in a challenging transition from one Agile software development method (Scrum) to Flow (which applies lean manufacturing techniques to software engineering). After several years of declining revenues, Dell was midway through an attempt to transform from a manufacturing-heavy strategy to an IT-intensive service-heavy strategy; its Fall 2017 acquisition of EMC was an important step in that direction. In recent years the company's leaders embraced agile software engineering using Scrum methods, and now executives believe Flow tools and techniques can improve managers' visibility into the work of software development teams, expose resourcing constraints and capacity utilization challenges, improve feedback loops for meaningful knowledge acquisition, and improve software development performance. As he plans his presentation for a 20-minute slot at the next day's meeting, the new manager ("Larry Ferreira") is told to keep his remarks to executives simple, highlighting no more than three messages.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. Some employee names have been disguised. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020. © 2020 by Denis Dennehy, Kieran Conboy and Janis Gogan. Contact person: Denis Dennehy, NUI-Galway, denis.dennegy@nui.galway.ie.

The University of South Florida and Tampa General Hospital: Selecting a badging platform

Terry M. McGovern, University of Wisconsin-Parkside

Case Synopsis

In October of 2019, Professor Matthew Mullarkey, had to decide on a digital badging platform to support a professional development program at University of South Florida (USF) for delivery to health care workers at Tampa General Hospital (TGH). Mullarkey was approached by TGH's CEO John Couris about a problem that Couris had with lower than desired patient satisfaction ratings. Couris was convinced that the low ratings were not due to clinical skills. TGH was a highly respected safety-net teaching hospital with nationally ranked clinical programs. Instead, Couris associated the dissatisfied patients with the professional and managerial development of his 8,100 employees in their interactions with employees and patients. Couris was prepared to invest \$10M into a healthcare professional development center in partnership with the Muma School of Business. Mullarkey thought a system of micro-credentials based on academic digital badges could provide an innovative way to credential TGH's employees as they completed developmental programs through USF. The badges could be stacked into more meaningful credentials such as college credits and certificates. Mullarkey knew little about digital badges and even less about digital badge platforms. Couris wanted a proposal by early December, giving Mullarkey 5 weeks to select a badging platform.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Vectra Digital: Capturing artificial intelligence value after adoption

Chrissann Ruehle, Florida Gulf Coast University
Faculty Supervisor: Grandon Gill, University of South Florida
Faculty Supervisor: Dejun Tony Kong, University of South Florida

Case Objectives and Use

The primary objective is to aid students in understanding the Artificial Intelligence (AI) adoption process. This case study was prepared for and tested in an online Integrated Management Capstone course comprised of undergraduate business and management students. This course focuses on applying relevant theories to real world business problems for senior students nearing graduation. Given the course structure, this case study could easily be included in a change management and innovation module. This case study places students in the position of the protagonist, Harrison Ambs, Chief Strategy Officer of Vectra Digital, and provides experience in preparing recommendations along with supporting the decision to adopt a proprietary AI system at the firm. Accordingly, the author developed the following learning objectives to focus the learning experience of students: Apply the Technology Acceptance Model (TAM) and TAM-2 to the AI adoption decision; analyze ethical considerations for the decision to adopt proprietary AI in a firm; and formulate an evidence-based argument and recommendation for the adoption of AI.

Case Synopsis

Despite the pervasiveness of Artificial Intelligence (AI), few cases have been written about this technology and its impact on the workplace. This case study explored the decision-making process behind Vectra Digital's development and adoption of its proprietary AI software named Ada in 2017. A newcomer to the digital marketing agency scene in Fort Myers, Florida, Vectra Digital was founded in 2017. Most firms expected to find this expertise in technology hubs like Silicon Valley or New York/Boston areas. Vectra decided to provide this technology acumen to clients that were seeking value and a local presence. For context, McKinsey Global Institute studied over four hundred AI use cases and estimated that sales and marketing presented substantial value for firms (Chui et al., 2018). Further, McKinsey projected that AI generated between \$1.4 trillion and \$2.6 trillion in marketing and sales enhancements towards the global economy in 2016 (Chui et al., 2017). Firms that possessed large databases of historical customer purchasing data and utilized social media channels for data mining were well positioned. Vectra Digital used AI to automate the labor-intensive and tedious processes of managing its clients' online advertising spending, providing performance reports, and even writing local ads. This freed up time and brainpower for workers to focus on strategic initiatives. Moreover, Ada worked 24/7 and proactively managed client budgets which benefitted customers and employees. This case study explored the adoption process, particularly the role of ethical considerations, using the Technology Acceptance Model (TAM) and TAM-2 as a theoretical lens.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

ENTREPRENEURSHIP, FAMILY, AND SMALL BUSINESS CASES

Track Chair: Erin Pleggenkuhle-Miles, University of Nebraska Omaha

Track Co-Chair: Jonathan Marks, University of Pretoria

Cases	Authors
Love Books: Passion and purpose driving the small business of paper book sale A Perfect Seed, Inc. in 2020 – Building a sustainable enterprise	Verity Hawarden Amy Moore Tamara Stenn
GreenNGood.com: Be green, be good	Rajesh Panda Pooja Gupta Madhvi Sethi
Givewith: Making of a business out of underwriting social impact	David Choi Darlene Fukuji
DriveU: India's premier on-demand driver provider	Subba Moorthy
Yes Bank – The case of the unrecognized promoter	Pooja Gupta Semila Fernandes
Paranoiabox.ru: Early growth decision dilemma of a quest start-up	Alla Dementieva Olga Kandinskaia Olga Khotyasheva
Flourishing through technological innovation: The case of a tech-startup, Smartchoice The Gulabi Code	Muhammad Khalid Jawaid Qureshi Ayesha Iftikhar Adeel Tariq
EatHeal: A quest for a healthy lifestyle	Ashraf Sheta Pansee Moussa Gina Ashraf Carol Narchy Hania Bakr

Cases	Authors
Marina and Lingvo Mania	Aditee Prabhakar
The Answer Series: Digital disruption in an established South African educational publisher	Terrence Elliott Mikael Samuelsson Claire Barnardo
Motherhood as the source of entrepreneurial innovation and ethics: The story of Zhansaya Abdumalik's Chess Academy	Mengzhana Olzhatay Aditee Prabhakar Anjan Ghosh
Keep or sell the healthcare family business: The case of Promamec	Mounir Chaouki Bertrand Guillotin
The new era brothers for trade: The problematic evolution of a family business within several industries	Ashraf Sheta Wageeh Shokrallah Zeina El Kawass Sherein Shatta Mariam El Haty Reem Abdel Aal Mariam Abou El Soud
Brent and Sam - The Cookie Guys	Joseph Bell Joe Felan
Urban Axes: First mover in US experiential entertainment	Marilyn Anthony Shreshthi Mehta
We'd Meat Burgers and Vamos Coffee: The challenges of a serial entrepreneur	Yeskender Amanbayev Anjan Ghosh
Corporate entrepreneurship at Enagás: Transforming from the inside out	Suzanne Jenkins Joan Riera Calvo
Peloton's ride to growth	Chris Winchester Erin Pleggenkuhle-Miles Erin Bass

Love Books: Passion and purpose driving the small business of paper book sales

Verity Hawarden and Amy Moore, Gordon Institute of Business Science (GIBS), University of Pretoria

Case Objectives and Use

This case can be used in graduate and post-graduate level courses, in management development programs, or in short executive education courses focusing on entrepreneurship, small business development or women in business. The objectives are to: Explore how cognitive dynamics affect an entrepreneur's evaluation of opportunities; analyze the case against the 4Cs (continuity, community, connection and command) of competitive business advantage; evaluate building blocks for sustainable business profitability; and assess and recommend different learnings for entrepreneurs and small business owners.

Case Synopsis

This real-life case is based on interviews that took place with Kate Rogan, the co-founder of Love Books, and other stakeholders associated with the small bookselling business that is based in the suburb of Melville in Johannesburg. It describes how Rogan's past influenced how she saw and was open to the opportunity; and how, through passion, commitment, dedication and stakeholder management, she created a business that brought meaning to her and others' lives. Rogan's vast experience in editing, publishing and radio influenced how she evaluated the bookstore opportunity. For the last eleven years, she focused on building a loyal customer base through knowing her customers, staying on top of current industry and market trends and constantly thinking about how she could add value through minimal financial outlay. COVID-19 further complicated her thinking about how to traditionally market and sell books to her client base. As the case concludes, Rogan wonders how to build upon the foundations of her successful bookshop and grow profitability while remaining true to her and the business's values.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Verity Hawarden and Amy Moore. Contact person: Verity Hawarden (Gordon Institute of Business Science, 26 Melville Road, Illovo, Gauteng, South Africa, +27 82 331 3573, pvharden@global.co.za).

Perfect Seed, Inc. in 2020 – Building a Sustainable Enterprise

Tamara Stenn, Landmark College

Case Synopsis

Cash poor and heart rich, A Perfect Seed, Inc. was a US start-up cooperative introducing new products in a saturated natural foods market that was increasingly consolidating. Could it succeed?

APS was a cooperative start-up created to enable students to apply marketing and economic concepts to build a resilient, sustainable enterprise that delighted customers and benefitted disadvantaged Royal Quinoa producers in Bolivia. It presented the challenge of bringing a new product to market, unique hand grown quinoa varieties, and building an audience around it while upholding sustainable development goals (SDGs). The cooperative board was made up of academics and Bolivian quinoa producers. APS gave students a unique insiders access to a remote, windswept world 14,000 above sea level, on the shores of the Uyuni salt flats. This was where Quechua and Aymara communities hand grew the world's most nutritious Royal Quinoa as their ancestors have done for thousands of years. APS's Novo-Andino recipes created new uses for the distinct Royal Quinoa varieties, each with unique culinary properties: rice-like Pandela, fast-cooking Toledo, creamy K'ispina, medicinal Negra, popcorn Pisankalla. This case included three years of Fulbright research on sustainable development and wellbeing in the Royal Quinoa heartlands of Bolivia. It introduced various concepts, tools, and measurements for building a resilient, sustainable enterprise via storytelling, recipes, and social media marketing. This case study can be studied static or interacted with live, with students launching social media messaging and setting real marketing targets they can engage in measuring and meeting.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

GreenNGood.com: Be green, be good

Dr Rajesh Panda, Symbiosis Institute of Business Management
Prof Pooja Gupta, Symbiosis Institute of Business Management
Dr Madhvi Sethi, Symbiosis Institute of Business Management

Case Objectives and Use

This case talks about the challenges faced by an online based start-up company. The case helps the students in understanding the key questions an entrepreneur faces and the decision-making dilemmas in front of them. The case is most suitable in a course of “Entrepreneurship” either at the undergraduate or post-graduate level. It can also be used in a course on “Business Strategy”.

The Objectives are:

- Understand the challenges which an entrepreneur faces while venturing into the online business landscape.
- Recognize the dynamics of business model and illustrate the interconnectedness among value proposition, profitability, resources and processes of a business model
- Assess the sustainability and adaptability of the business model in order to grow the business

Case Synopsis

Aparna Bhatnagar’s motivation and passion for socially responsible business led to the creation of Future Eyez India (FEI) that started selling products online which were natural, organic and made by local artisans through a website named www.GreenNGood.com. The venture had won several accolades but was undergoing tremendous financial pressures in terms of financing and profitability. In case (A) Aparna is faced with the dilemma where she is rethinking whether or not to continue the business in 2014. It provides a platform for students to discuss the several alternatives available to Aparna and lead towards a decision for her business. Case B narrates the restructuring process undertaken by Aparna and provides students an opportunity to discuss her decisions for future growth.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Givewith: Making a business out of underwriting social impact

David Y Choi, Loyola Marymount University (Faculty Supervisor)

Darlene M. Fukuji, Loyola Marymount University

Chanti Soleil (Student Author)

Case Objectives and Use

The case is intended for courses in Entrepreneurship, Social Entrepreneurship, and Corporate Social Responsibility. It could also be used for special topic courses in Economics or Sustainability. The case is applicable for courses in both undergraduate and graduate levels. The objectives are: Analyze the viability of the highly unique business concept of imbedding social impact giving in everyday B2B transaction; rigorously examine the business model and the associated economics, i.e., whether imbedding social impact in B2B transactions could in fact create incremental financial value to buyers and sellers; systematically examine a company's growth strategy options including a thorough analysis of its partnership strategy; and provide students a new appreciation for the power of ideas and possibilities in entrepreneurship.

Case Synopsis

This case captures the fascinating story Paul Polizzotto, a serial entrepreneur, and his for-profit social enterprise, Givewith, which was experiencing rapid growth in the summer of 2020. Givewith was a 4-year old company with the radical idea to leverage B2B transactions as an agent for social change across all industries and use technology to do it at scale and with precision. At the heart of the debate is whether Givewith's business concept of imbedding social impact giving in B2B transactions for selling all goods in every industry offers a viable business model and whether it could indeed create measurable incremental economic value to buyers and sellers. In the case, Paul successfully demonstrates the business' viability through third-party studies and actual acceptance in the market place (clients, partners and growth) achieved through his outsized entrepreneurial competence. Another key discussion centers on the strategies Paul should take on to accelerate Givewith's growth and reach its potential more quickly. He is faced with three major choices, i.e., self-finance, finance through institutional capital, or partner with a large company. The most interesting part of the discussion focuses on which partner firm(s) might offer the best fit considering Givewith's mission, the technologies it developed, and the dynamic personality of the entrepreneur.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by David Y Choi, Darlene Fukuji and Chanti Soleil. Contact person: David Y Choi, Loyola Marymount University, 1 LMU Drive, Los Angeles, CA 90045, 310-338-2344, david.choi@lmu.edu.

DriveU, Inc. India's premier on-demand driver provider

Subba Moorthy, St. Cloud State University

Case Objectives and Use

The case is targeted toward undergraduate and MBA students. It is equally appropriate for use in three types of courses:

1. in an entrepreneurship course to understand the challenges and managing business startup, and of rapid growth;
2. in a capstone strategy course to conduct SWOT analysis, as well as organizational design;
3. in a technology management course to understand and appreciate how (a) two-sided technology based businesses are disrupting existing industry structures in developing countries, and (2) how data analytics and smart-phone app expertise can be used to achieve and maintain a differentiation strategy.

The case also lends admirably to explore entry modes for international expansion.

Case Synopsis

The case is set in India – a country whose transportation infrastructure has not kept pace with the growth of the middle class and the resulting phenomenal increasing in private car ownership. This has led to perennial traffic jams in all of India's major cities. DriveU was started in July 2015, by the father and son team of Rahm and Ashok Sastry (US citizens of Indian origin), as a business which would provide professional drivers for as short as just one hour to car owners who preferred to have someone else drive their cars. Its growth was phenomenal. By December 2019 it had expanded into India's seven biggest (Tier 1) cities mostly through acquisitions. It had also diversified from its original b2c segment into adjacent segments as well as into b2b markets. The company had also become profitable in the short three and a half year span – an enviable achievement not seen in other platform based firms such as Uber, AirBnB and WeWork. At end of the case, the father and son duo were deliberating on where to and how. Should DriveU continue its rapid growth to gain scale and first-mover advantages? If so, should it expand into India's Tier 2 cities or go global? Or, slow they slow down to consolidate gains and to take stock - that is, take a dispassionate look at the company's resources and capabilities to decide (1) which resources/capabilities could be better leveraged, (2) which needed to be upgraded, and (3) which capabilities did DriveU not possess, and so, had to invest in and create?

The author developed this case for class discussion rather than to illustrate effective or ineffective handling situations. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Subba Moorthy. Contact details: Subba Moorthy, Herberger Business School, St. Cloud State University, St. Cloud, MN. psubba@stcloudstate.edu

Yes Bank – The case of the Unrecognized promoter

Pooja Gupta and Semila Fernandes, Symbiosis Institute of Business Management

Case Objectives and Use

- Understand the basic tenets of ownership structure in family business
- Understand the different kinds of ownership models present in the family business
- Analyze the importance of a formal family constitution and its role in ownership structure
- Synthesize the various roles of ownership in a family business keeping in view the varying needs of different family members

The case can be taught in “Understanding Family Business” course as a part of ‘Managing Ownership Challenges’ in a post graduate MBA program. This case can also be taught in the course ‘Corporate Governance’ in MBA or Executive MBA program in the first year.

Case Synopsis

The case revolves around the ongoing power struggle in Yes Bank between the two promoter families. Mr. Rana Kapoor, co-founder of the bank and currently the Managing Director and CEO of Yes Bank who holds 13.72% shares in the bank is on one side of this dispute. On the other side is his sister-in-law, Madhu Kapur (wife of late Mr. Ashok Kapur) who owns 12% of the shares. Yes Bank was incorporated in 2004 by Rana Kapoor and Late Ashok Kapur, and was set up as a new age private sector bank. The dispute started after the death of Ashok Kapur in the terrorist attack on 26th November, 2008. Madhu Kapur and her family believe that as promoter shareholder they have an equal right to nominate members for the board of directors and have proposed their names on various occasions. The court in its judgement has upheld the rights of Madhu Kapur and her family in having a say in appointment of independent directors.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Paranoiabox.ru: Early growth decision dilemma of a quest start-up

Alla Dementieva, Moscow State Institute of International Relations MGIMO University
Olga Kandinskaia, Cyprus International Institute of Management
Olga Khotyashева, Moscow State Institute of International Relations MGIMO University

Case Objectives and Use

The case is a multidisciplinary case with the aspects of entrepreneurship, marketing strategy and finance. It is intended primarily for a course in Entrepreneurship, but it can be also used in a Marketing class or an Entrepreneurial Finance class at the undergraduate or graduate level.

In completing this assignment, students should be able to:

1. Distinguish between the opportunity-based ventures and the necessity-based ventures
2. Explain the importance of a single vision for a start-up team
3. Demonstrate a comprehension of Business Model Canvas and Customer Journey Map, and explain how these apply to the start-up business
4. Define the four types of crowdfunding, list their advantages and disadvantages for start-up financing, justify whether crowdfunding is appropriate in this case, and if so, which type
5. Make adjustments to the marketing program on the basis of Marketing 4.0 and develop innovative methods of sales to meet the business goals

Case Synopsis

Paranoiabox.ru case presents an entrepreneurial and strategic marketing decision situation. In May 2019, in Moscow, Russia, two young residents of the MGIMO University business incubator Anastasia and Max founded the start-up business called Paranoiabox.ru. This project was a quest in a new format with home delivery: a mixture of escape, detective and board game. The player received by post a box containing various objects. Interacting with them, he or she unraveled the plot thread, found clues and gradually approached the final clue. The game with complex copyright puzzles had a built-in hint system and provided mechanisms for interaction online. By July 2019, 30 boxes for their first quest were sold. The subscribers were waiting for a new quest. Despite the first sales, Anastasia and Max had no budget for hiring freelancers or outsourcing. They were faced with an urgent and challenging dilemma: whether to concentrate on the current product sales and spend all the budget on promotion, or, alternatively, to launch a series of new quests and focus on the target market with high brand awareness. The latter may also lead to launching a crowdfunding campaign to finance the growth.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Flourishing through Technological Innovation: The Case of a Tech-startup, Smartchoice

Muhammad Khalid, SZABIST University
Jawaid Qureshi, SZABIST University

Case Objectives and Use

This case study is suitable to be taught to the students of Entrepreneurship class, whereas it can also be taught to classes of Marketing or Business Strategy/Strategic Management as sub-areas/subjects. The study level is for graduates in management science or MBA and EMBA to MS/MPhil and PhD students. It is suitable for teaching anywhere but ideally near the middle or end of the above courses. The objectives (or expected learning objectives and outcomes) are: Review theories of innovation, sustainable competitive advantages, resource based view, knowledge based view, intellectual capital, and growth; analyze and evaluate the company situations in the light of these theories; and design strategic solutions for sustaining its competitive position and combating challenges of growth and increasing competition.

Synopsis

Along with his team, Sibtain Jiwni designed an easy-to-use application to compare the features and benefits of various financial products for insurance and banking products, which consumers used for making rationale decisions of purchase. Smartchoice partnered with several companies in the financial sector and received overwhelming response of customers. As it emerged as a pioneer and leading brand, abruptly competition surfaced and two of its product lines flopped. There were no entry barriers and it was tech-based business requiring not much investment, so many rivals entered the market. Sustaining its competitive advantage and growth hacking via technological supremacy, collaboration with network partners, and brand loyalty among customers posed challenges for Smartchoice. Moreover, the other front burner issues comprised extending partners' network in the financial industry, expanding operations in the entire country, especially semi-urban and rural territories, and raising equity or finance in an extra ordinary sluggish macro-economic situation amid pandemic COVID-19 causing substantial economic downturn affecting most of the industries. The research design used in this case includes three interviews each from the top management of Smartchoice, and insurance companies' experts. Pertinent literature and media content analysis were also availed to extract and analyze essential facts and figures to themes. Reviewing data from multiple sources allowed cross comparison of data for greater authenticity, credibility, trustworthiness, and triangulation. Canons of conducting research with high ethical standards and unbiased ways were applied.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

The Gulabi Code

Ayesha Iftikhar, National University of Sciences and Technology
Adeel Tariq, National University of Sciences and Technology

Case Objective and Use

The case can be used in both Undergrad and MBA, New Venture Creation and new product and new service creation, classes to develop the understanding of the students about the importance of the idea and need analysis.

- Review how to pursue an idea or identified opportunity by validating it through market research.
- Translating identified customer needs into need specifications and need matrix list.
- Finally, translating need matrix list into acceptable values, service development web and mobile app concept.

Moreover, the case focuses on the importance of pursuing the idea in a right marketplace. It also covers the importance of pilot testing, research and innovation, pilot testing, understanding the market dynamics before pursuing the idea.

Synopsis

In January 2020, Aleya and Rida two enthusiastic budding entrepreneurs decided to convert their passion into successful venture. But they found themselves stuck at the point “how to know if the idea is viable or not?”, Is it that simple? How to tell if there is a need of this idea in the market? The founders went through a series of steps to validate their idea, “a two-sided platform to address women reproductive needs”. Amazingly enough, they received a positive response for their idea using interviews and surveys from the public and experts, so they continue working on a project named “The Gulabi Code”

The authors have developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020. Contact person: Dr. Adeel Tariq, atariq.adeel@gmail.com

EatHeal: A quest for a healthy lifestyle

Ashraf Sheta, American University in Cairo
Pansee Moussa, American University in Cairo
Gina Ashraf, American University in Cairo
Carol Narchi, American University in Cairo
Hania Bakr, American University in Cairo

Case Objectives and Use

The case can be used in a faculty seminar, class discussions or students (especially undergraduate students, as they prepare to embark on their entrepreneurial careers). The objectives are:

- 1- Review the positioning school of thought is strategy.
- 2- Recognize the situations where there is a need to use the principles of decision making theory.
- 3- Explore the challenges facing entrepreneurs within the Egyptian context.
- 4- Relate the different theories of strategy, and entrepreneurship to real life situations.

This case is targeted to students learning about entrepreneurship and strategy at UG levels. By the end of the case students will be able to:

- Understand how to analyze the external and internal environment in order to serve strategic decisions
- Understand the importance for establishing a strong, and sustainable business
- Understand the challenges facing the sustainability of businesses
- Develop understanding of how to institutionalize business

Case Synopsis

The case is addressing EatHeal company within the time frame of 2019. EatHeal is a medically tailored nutrition & food service provider which provides services that includes meal planning, prepared meal delivery, and nutrition counseling. They serve people who have either special health conditions such as diabetes, heart and kidney problems, and some allergies or those who seek weight management, either weight loss or gain. Even though EatHeal has been running successfully since it was established, the main issue now facing Dr. Rehab, the founder of EatHeal, is how to build and maintain a sustainable business model while generating revenues and higher profits. Even though EatHeal's original business model has allowed the company to survive. With a growing foodservice market and competition, the company needs to adjust its business plan to grow and be competitive itself.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Marina and Lingvo Mania

Aditee Prabhakar, Silk Road Case Centre, Narxoz University

Case Objective and Use

This case can be used in undergraduate (BBA) and postgraduate (MBA) management program on Entrepreneurship. The case is also suited for elective courses on entrepreneurship in non-management graduate and undergraduate programs. Additionally, the case can be used in the promotional events and programs on entrepreneurship targeted for a wider audience. The objectives are:

- Introduce the core elements of entrepreneurship – entrepreneurial motivation, innovation, opportunity identification and venture creation
- Introduce the core phases of new venture –ideation, venture creation, venture survival and growth, venture transition
- Introduce the entrepreneurial capitals that entrepreneur can leverage to start the venture – economic capital, cultural capital, social capital
- Explore systematic approaches that the entrepreneur can use decision-making

Synopsis

This case is situated at the backdrop of post-soviet, Central Asian, emerging economy context. It presents Marina Khalachshuk – a first generation women entrepreneur and her SME start-up LingvoMania – a leading language institute in Kazakhstan. At the beginning, the case shows how an individual from the childhood days continuously interacted with her environment. The interaction between the individual and the environment enacted Marina to keep looking for new challenges. The process continued for years and at a critical juncture of her life, she got the motivation and confidence to start her own venture to respond to an opportunity that she perceived and was convinced with. As one would expect, it was not a simple linear movement for the protagonist because she had to experience personal dilemmas and faced several challenges (including some real tough ones) in her venture. The case also explores how she formed a legal entity that brought people on board as employees and used the innovative business model to start economic activities. In the final part, the case talks about the struggle of the entrepreneur to ensure the success of the enterprise. This phase also shows the dilemma of the entrepreneur as an individual; first it's the dilemma of whether to manage all critical things by the entrepreneur herself or to recruit, trust and empower others to take up organizational responsibilities and second, the dilemmas in taking the right strategic and business decisions for venture growth. This part of the case takes the participants/ readers beyond the excitement and challenges of entrepreneurial innovation and venture formation and gives them insights of the struggle in the competitive marketplace to achieve and sustain success.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

The Answer Series: Digital disruption in an established South African educational publisher

Terrence Elliott (student author), University of Cape Town
Mikael Samuelsson (faculty supervisor), University of Cape Town

Case Objectives and Use

This teaching case study is aimed at students studying Postgraduate Diplomas in Management (PGDip), Master of Business Administration (MBA), executive education programmes, and any future management programmes or short courses specialising in disruptive innovation or family business. The case is particularly applicable to students of strategy, marketing and entrepreneurship. The teaching objectives revolve around the primary themes of disruption and family entrepreneurship and how these may impact strategic planning. The objectives of the case are to:

- analyse the disruptive threats prevalent within an incumbent's industry and assess the likelihood and speed at which disruption may occur;
- assess and develop appropriate strategies to respond to disruption that consider the constraints of the incumbent being disrupted; and
- appreciate the governance complexities of a family business, particularly during generational successions.

Synopsis

The Answer Series (TAS) is a family-run business that develops and sells subject-focused educational content, in print format, across South Africa. The company was founded in 1975 by Anne Eadie, a Mathematics teacher and mother of four. Together with her husband, Dave, and eventually her son DJ, daughter Gretel and son-in-law, Gary, they built the company to become a well-known, respected brand that is the retail bookshop market leader in its category. But leadership decisions need to be made after the sudden passing of DJ, and Anne and Dave's other son George is brought into the fold. And while his parents have indicated their intention of handing over the reins to their children, they are having a hard time letting go. George is also worried that he might step on Gretel and Gary's toes as they have been there longer and might not appreciate a newcomer taking control. Amidst what could become a succession battle, the issue of digital disruption is also looming. TAS has to re-evaluate their place in the market and consider the possibilities of a digital future – and they have to do it fast, because their competitors are already one step ahead of them. With the current governance structures as well as the era that the directors are from, will they be able to adequately consider their place in the market and the possibilities of a digital future?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Motherhood as the source of entrepreneurial innovation and ethics: The story of Zhansaya Abdumalik's chess academy

Mengzhana Olzhatay, Student, Narxoz University
Aditee Prabhakar, Visiting Research Fellow, Narxoz University
Anjan Ghosh, Faculty guide, Narxoz University

Case Objectives and Use

This case gives students exposure to various novel aspects of entrepreneurship through the context of Women Entrepreneurship. The case can be used in introducing the audience to:

- The core elements of entrepreneurship
- Phases in entrepreneurship
- Concept of Women Entrepreneurship
- Motherhood as Source of Entrepreneurial motivation and Innovation

The case is suitable for courses on entrepreneurship or strategic management in undergraduate and post graduate programs. As the case focuses on the novel aspect of Women Entrepreneurship, it could be an ideal fit to programs and seminars on Women Entrepreneurship as well as gender equality. It is an ideal case to argue that motherhood doesn't necessarily act against the progression of professional career but could be leveraged in starting novel business ventures.

Case Synopsis

The case follows the journey of Alma Ashirova. It is a novel case to show how a family can bring positive changes a country inspiring and empowering hundreds of individuals across all segments of the society. In the first part of the case, the narratives cover the struggle of a couple who loved chess but couldn't pursue the passion in the soviet era due to conservative family outlooks where chess was not considered a career option. The second part of the case shows how the couple's passion got transferred to their kids. It elaborates how the couple struggled to arrange proper training for their daughter who later became a grandmaster and world champion. The struggle of their daughter in a foreign land became the source of motivation for Alma to start a chess academy in Almaty, Kazakhstan defying all society-apprehensions. The urge to protect the academy named after Zhansaya, the leveraging of the motherhood experience of supporting Zhansaya and the compassion all contributed in making The Chess Academy a novel and successful venture. The final part of the case narrates the expansion of the venture from chess academy to a large residential school that would combine academia and chess to nurture youngsters. The case invites the participants to work on the challenges that the new venture can face and possible ways to address such challenges.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. This case is developed on the primary data collected through participant observations and interviews. The owner of the business approved the present version of the manuscript. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Mengzhana Olzhatay, Aditee Prabhakar and Anjan Ghosh. Contact person: Anjan Ghosh, Narxoz University, Almaty, Kazakhstan, anjan.ghosh@narxoz.kz

Keep or sell the healthcare family business: The case of Promamec

Mounir Chaouki, Promamec, Telecom Paris-Tech, and EMINES Morocco
Bertrand Guillotin, Temple University, Fox School of Business

Case Objectives and Use

This case is suitable for undergraduate or graduate courses on global strategy or entrepreneurship. However, due to its rich business context and interviews, this case can be used to address challenges and opportunities in human resources management, family-owned business management, or leadership. After working through the case, its videos, and the assignment questions, students will be able to do the following: Identify and understand the opportunities and challenges associated with a family-owned health care business in an emerging market; evaluate the impact of macroeconomic, political, regulatory, cultural, and personal factors on a fast-growing family-owned business; assess the tangible and intangible resources that are necessary to create a sustainable competitive advantage, even against the odds in an emerging market where the business landscape shifts unpredictably (e.g., Arab Spring); identify and understand the impact of key strategic decisions on a CEO's career and reputation; evaluate the pros and cons of making strategic decisions, without having all the data, while also considering other implications such as potential family transition challenges and new regulations; understand growth strategies and their implications in a global business context, full of unprecedented changes and uncertainty, including landmark regulatory changes in the kingdom of Morocco; improve decision-making abilities by using scenarios in presence of a game-changing opportunity, such as the addition of a significant private equity investment into the family business.

Case Synopsis

This real case depicts the fascinating success story of Promamec, a family-owned business and an unexpected healthcare champion, amid unprecedented business environment changes, in Morocco's business capital, Casablanca. Known as one of the poorest Arab countries in the world, Morocco has become an emerging market that has attracted many foreign investors. Competition has intensified and financial resources have become more limited for Promamec. More specifically, the case draws attention to a crucial leadership transition between generations (2006) and a very challenging strategic decision (2018) to ensure future prosperity. The son of the founder, now in charge, must decide whether to keep the business in the family or sell it to private equity investors.

The authors wrote this real case only for class or executive workshop discussion. They do not intend to judge or illustrate, either effective or ineffective handling of a managerial situation. They were authorized to have access to Promamec's documents and executives for several interviews, recorded and transcribed professionally. The primary author has been the Marketing Director of Promamec since 2017. Any other name may have been modified to respect confidentiality. This field case is written from the perspective of the main protagonist: Naoufal Lahlou, the General Manager of Promamec and son of the company's founder. Contact person: Mounir Chaouki: mounir.chaouki11@gmail.com

The new era brothers for trade: The problematic evolution of a family business within several industries

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Mariam El Haty, American University in Cairo
Reem Walid, American University in Cairo
Mariam Aboul-Seoud, American University in Cairo

Case objectives and use

The case can be used in a faculty seminar (such as a seminar on family business, or on teaching by the case method), a graduate/undergraduate class in family business, or a seminar for doctoral students (as they prepare to embark on their academic careers). The instructors' goals for teaching this case are: Illustrate to the students the importance of governance, and succession for family business continuity; evaluate the level of understanding of the students regarding the different concepts related to family business; help the students to demonstrate their critical thinking capabilities regarding complex problems; compare the level of understanding of family business concepts among the students in class; and provide tools to link theories of family business to practice.

This case is targeted to students learning about family business and strategy at both graduate, and UG levels.

Case synopsis

This disguised case, based on actual events which occurred during the time frame from 1956 till 2019. The case addresses a business operated by an Egyptian family, who operates several businesses within different industries. The company was founded in 1956 by two brothers, Tarek and Othman. The case is presented through Younis Othman's point of view, discussing the challenges faced by the family business, and the dilemmas he is currently facing as an aspiring entrepreneur. These challenges have to do with ownership, governance, and succession. The case aims to cover challenges related to institutionalizing a family business through establishing an official holding company, as well as developing a constitution for the family and the employees to abide by. This case also addresses elements related to industry analysis and an enthusiastic entrepreneur's profile, spirit, and strategic thinking.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Brent and Sam - The Cookie Guys

Joseph Bell, University of Arkansas at Little Rock
Joe Felan, University of Arkansas at Little Rock

Case Objectives and Use

This case is intended for graduate or undergraduate courses in business planning, general entrepreneurship, or entrepreneurial finance. The case is positioned to discuss the start-up process of a new business, a methodical expansion, and a successful harvest. The case can serve as the initial opportunity to facilitate a class discussion on the concepts of bootstrapping and frugality, and how it can ultimately lead to the sale of the business. Specifically, the case deals with the realities of slow methodical company growth over a 21-year period and the implementation of a strategy, on purpose or by accident, that lead to steady growth and a market position that attracted a formidable suitor.

A major theme of this case concerns the growth process and managerial issues surrounding market expansion in the very competitive cookie industry. This case should provide a forum for discussing and analyzing:

1. The process of a bootstrapped startup.
2. The estimated valuation of a small closely held company.
3. The decision to forgo a rapid growth strategy in favor of a very methodical growth process.
4. The opportunity to change your market and reposition your product.
5. The harvest process in a small closely held venture.

Case Synopsis

Brent Bumpers, attorney, son of the Governor and future US Senator, really liked chocolate chip cookies. He liked chocolate chip cookies so much he and his childhood friend started a cookie company. The cookies were gourmet and premium-priced. Serving as an inauspicious start for a company that will sell 21 years later for \$26.3 million, the partners began the business by baking cookies at night in a friend's pizza oven. Follow the methodical growth model put in place by the founders and watch as a shift in the market placed opportunity at their doorstep. What follows is an opportunity to follow a cookie company that began with a single recipe and grew to over 200 varieties of cookies and found their way to the shelves of this nation's leading grocery retailers.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Urban Axes: First mover in US experiential entertainment

Marilyn Anthony, Temple University
Shreshthi Mehta, Student author, Northwestern University

Case Objectives and Use

This case is suitable for undergraduate and graduate level courses on strategic management, ideally in the latter part of the semester when growth and diversification concepts are addressed. The case provides the opportunity to practice concepts already covered (Porter's Five Forces, GDPEST, VRIO, and Generic Strategy) while introducing first mover elements and factors shaping strategic growth decisions. Working through the case analysis enables students to:

- Understand the pros and cons of being a first mover
- Explore how to identify market opportunity in a new field using GDPEST and Porter's 5 Forces
- Understand the impact of generic strategy on market positioning
- Apply a VRIO analysis to identify competitive advantage
- Recognize the challenges of responding to competition
- Determine options for expansion- franchising, wholly owned, geographic saturation, national distribution, etc.
- Weigh the opportunity costs and benefits to determine the optimum growth option

Case Synopsis

Urban Axes (UA) introduced the Canadian indoor sport of axe throwing to the US market, beginning with one location in Philadelphia, PA in 2016. Originally begun as a "side hustle" by four friends with corporate jobs, it soon became apparent that the concept could be both popular and profitable. The case features a woman protagonist, Krista Paton, CFO and the originator of the business plan.

This field case is an example of the first mover principle, highlighting the risks and rewards of creating a new line of business in a competitive and volatile industry; in this case that of indoor, or "experiential" entertainment. After achieving early success beyond their expectations, Urban Axes' founders quickly experienced the pressure of numerous competitors entering the field. The partners were determined to find a way to establish sustained competitive advantage and increased earnings through a growth strategy. But how best to grow, when and where? This case exposes students to the many decision points early stage companies face and the consequences, positive or not, that initial choices play in a business' growth and viability.

The authors developed this case for class discussion rather than to illustrate a correct or incorrect strategy. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, Texas, October 8-10, 2020. 2020 by Marilyn Anthony and Shreshthi Mehta. Contact: Marilyn Anthony, Fox School of Business, Temple University, 1810 Liacouras Walk, Philadelphia PA 19122, (m) 610-442-2865, email m.anthony@temple.edu

We'd Meat Burgers and Vamos Coffee: The challenges of a serial entrepreneur

Yeskender Amanbayev, Student, Narxoz University
Anjan Ghosh, Faculty guide, Narxoz University

Case Objectives and Use

This case gives students exposure to various novel aspects of entrepreneurship. The case can be used in introducing the audience to:

- The core elements of entrepreneurship
- The difference of running a regular business and an entrepreneurial venture
- Phases in entrepreneurship
- Concept of serial entrepreneurship and challenges within

The case is suitable for courses on entrepreneurship or strategic management in undergraduate and post graduate programs. The case can also be used to discuss some issues of succession in family business.

Case Synopsis

The case narrated the journey of Zhanaidar Tlegenov and his transformation from being the head of a family business to a serial entrepreneur in Kazakhstan. It describes how a person born in the Soviet era takes over the successful family business in post-Soviet era and transforms himself from a family business owner to a creative serial entrepreneur. Zhanaidar was born in a family that owned several restaurants. After his father retired, he became the owner of the restaurants. Tired in running monotonous business and with an urge to engage into creative ventures, he decided to sell existing businesses and start newer venture. The case shows how new philosophy adopted in the post-Soviet time makes the entrepreneur to move away from the traditional business and venture into the businesses aligned to his principles. His first entrepreneurial venture was We'd Meat Burgers – a music themed fast-casual burger restaurant in Almaty. The case describes in detail the elements and phases of venture creation. The case further details out the entrepreneurial innovations to create competitive advantage. It also shows the entrepreneurial struggle in sustaining the venture. In the second part, the case shows how Zhanaidar steps into serial entrepreneurship and starts Vamos Coffee catering to a niche market – coffee outlets within sports facilities. The case gives the audience exposure to the challenges of managing multiple new ventures. Finally, the case engages the audience in role-play to explore serial entrepreneurship.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. This case is developed on the primary data collected through participant observations and interviews. The owner of the business approved the present version of the manuscript. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Yeskender Amanbayev and Anjan Ghosh. Contact person: Yeskender Amanbayev, Narxoz University, Almaty, Kazakhstan, yeskender.amanbayev@narxoz.kz

Corporate entrepreneurship at Enagas: Transforming from the inside out

Joan Riera Calvo, ESADE Business School
Suzanne Jenkins, ESADE Business School

Case Objectives and Use

This case works well in later stages of programs that cover different functional areas of business management, such as MBA programs, and in a session toward the end of a Strategy, Entrepreneurship, Innovation, or Human Resources course. Other audiences include senior executives in large companies, whether they are traditional corporations concerned about innovating or rapidly growing companies concerned about recovering their entrepreneurial spirit and culture. Students will learn to: Drive innovation through corporate entrepreneurship and its internal and external dimensions; appreciate the strategic and organizational challenge that big companies face to adapt quickly to changing environments, balancing short-term earnings pressures with long-term trends; understand and harness the natural tension between the entrepreneurial character, oriented toward effectiveness, and the traditional corporate culture, oriented toward efficiency; evaluate the advantages and disadvantages of becoming an intrapreneur in a corporation; navigate the journey to convert an idea into a business, from conception to impact on the P&L; and believe it is attainable to generate an entrepreneurial spirit, to change the organizational culture, and to encourage a proactive attitude with a high degree of ambition: everything is possible.

Case Synopsis

In September 2017, the CEO of Enagás, a natural gas infrastructure company based in Madrid, Spain, invited Fernando Impuesto, the 48-year old Commercial and Technical Services Director, to build out the company's corporate entrepreneurship initiative as a main lever in the new strategy to diversify the company toward decarbonized business models. Fernando had conceived and developed the program during the previous three years as one of many responsibilities, and the main focus had been on transforming the company culture and developing internal entrepreneurs. Accepting CEO Marcelino Oreja's invitation would require leaving his position—and all of the privileges it entailed—and restructuring the program in alignment with the new strategy. The case offers a journey through key decisions in corporate entrepreneurship: structuring the unit; analyzing, designing, and fleshing out an intrapreneurship system; resolving tensions between the internal entrepreneurs and the rest of the corporation; and opening up to collaborate with external startups in order to capture value in the external ecosystem. It spurs debate about the universal challenge of innovating with agility and flexibility, using the extreme case of a large, traditional company with regulated income.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2019 Conference, Online, October 8-10, 2020. © 2020 by Joan Riera and Suzanne Jenkins. Contact person: Suzanne Jenkins, ESADE Business School, Av. de la Torre Blanca, 59, 08172 Sant Cugat, Barcelona, Spain, +34 689 429 280, suzanne.jenkins.ext@alumni.esade.edu.

Peloton's ride to growth

Christopher C. Winchester, University of Nebraska at Omaha
Erin G. Pleggenkuhle-Miles, University of Nebraska at Omaha
A. Erin Bass, University of Nebraska at Omaha

Case Objectives and Use

This case is best taught in undergraduate and graduate strategy courses. For undergraduate courses it could be incorporated into lessons on competitive dynamics, internal analysis and first-mover advantage, and strategic positioning. For graduate courses, it could be incorporated into lessons on vertical integration, and delving more in-depth into the long-term sustainability of having a first-mover advantage. The specific course objectives are as follows:

- 1- To analyze internal factors that contribute to the advantages and disadvantages of vertical integration.
- 2- To investigate a firm's first-mover advantage and whether they are strategically positioned to sustainably maintain this advantage.
- 3- To explore competitive dynamics and how these affect a firm's positioning.

Case Synopsis

Peloton Interactive Inc. was described as “a technology company, media company, software company, a product-design company, a retail company, an apparel company and ‘a social connection company that enables our community to support one another.” Peloton used vertical integration to control the creation of its own software, bikes, exercise classes, and even retail outlets. From production to delivery, Peloton took nearly full control of its production, sales, and delivery cycles. In doing so, Peloton was one of the first companies in the industry to have near full control of the production process. Due to this integration of streaming workout classes with its fitness equipment, Peloton was one of the fitness equipment industry leaders. In less than eight years, from 2012 to early 2020, Peloton grew to more than 1,200 employees and 1.6 million subscribers. However, this growth created issues of maintaining its start-up culture, adjusting its operations to become more decentralized, and efficiently managing its production process. Additionally, Peloton's high level of vertical integration coupled with rapid growth led to an increase in its operating expenses by 147%. Consequently, net income dropped from -\$47.9 million to -\$195.6 million from 2018 to 2019. At the beginning of 2020, Peloton's lackluster profitability combined with slowing growth had analysts concerned. Given the rise in popularity of in-home exercise equipment, Peloton had room to continue its growth, but the question remained whether it was strategically positioned to do so.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Christopher C. Winchester, Erin G. Pleggenkuhle-Miles, and A. Erin Bass. Contact person: Christopher C Winchester, University of Minnesota, 321 19th Ave S, Minneapolis, MN, 55455, 402.709.0208, winch092@umn.edu.

MARKETING AND INTERNATIONAL BUSINESS CASES

Track Chair: Silvia Cacho-Elizondo, IPADE Business School

Track Co-Chair: Grishma Shah, Manhattan College

Cases	Authors
Reckoning with Jemima: Can the brand be remade for good?	Michael Stanko Joseph Miller Mariam D. Diallo
Airbnb: A unicorn struggling to restore trust	Amanpreet Kang
TymeBank: Chasing the next million	Michael Goldman Nicola Kleyn Luisa Mazinter
Shaping Products, Inc.: Managing sales in a changing market	Sharon Hodge Earl Honeycutt
Total Logistics	Silvia Cacho-Elizondo Francisco Espinosa
Promotional industry merchandise – Market expansion vs. market development: The case of Crescent Enterprises	Nida Khan Aslam Jami Moiz
Nutrilov: The dilemma of healthy packaging for granola bars	Jami Moiz Nida Khan Aslam
Challenges at Saint Catherine’s College Summer Theatre	John Frederick Dion Susan Daniels
Herz: What next...The next big leap	Rajani Ramdas
Bemis: Managing a distressed client portfolio	Gustavo Calatrava Javier Silva Ariel Antolin

Cases	Authors
Dos Hemisferios: Putting high quality Ecuadorian wines on the map	Jacob Massoud Vafa Saboori-Deilami
Yun Dong Jia: A silver lining on “Cloud” during Covid-19 lockdown	Caleb Chen Yuen Wah Li Allan Chan Cathy Leung
Renoir Inc.: Make a jigsaw puzzle more than a jigsaw puzzle	Chandler Chu Grace C. Su Ting Yuan Huang
Digital transformation of TSG from a B2B to a B2C company	Srinivas Pingali Grishma Shah
Do we shop until we drop?	Michael McCollough
Clearview AI: Picturing the future	Eric Dolansky Todd Green
Oakville Improv Theatre Company: Sketching out the future	Eric Dolansky Manvir Brar
Paramount Sherbet: No time to cool down	Subhalaxmi Mohapatra Soumya Sarkar Subhadip Roy
Fair and Handsome: Faring not so handsome in BLM times	Pooja Gupta Semila Fernandes
Kingfisher: Ultra Max re-positioning hurdle	Bikramjit Rishi Archit Kacker

Reckoning with Jemima: Can the brand be remade for good?

Joseph C. Miller, St. Ambrose University
Michael A. Stanko, North Carolina State University

Case Objectives and Use

The case is intended to foster learning in several specific focus areas:

- Ethical decision making
- Inertia in the context of ethical decision making
- Rebranding
- Connecting social mission and branding decisions

This case is suitable for graduate students or advanced undergraduate students in marketing or specialty courses in sustainability. Core graduate-level marketing courses, or undergraduate or MBA marketing strategy courses are well suited. The case will also fit well in courses on marketing ethics. Business ethics or capstone management courses may also find the case valuable for discussion.

Case Synopsis

During June 2020, pressure mounted on Quaker Oats and their parent company PepsiCo to make changes to their Aunt Jemima brand. The brand's origin was rooted in the legacy of slavery; the character of Aunt Jemima was an encapsulation of the "mammy", a proud, but subservient caricature of Black women. Despite calls for removing the brand for decades, Quaker Oats' responses resulted in modifications to the brand over time that kept the mascot current with the times, without changing the overall messaging (e.g., adding a pearl necklace to Aunt Jemima, or eschewing her bandana headdress). Following the police killing of George Floyd, online activists again criticized the brand, with one prominent viral video including: "Black lives matter people...even over breakfast". On June 16, PepsiCo announced a series of plans (totalling more than \$400m over 5 years) to "address issues of inequality and create opportunity" including sourcing from Black owned businesses and funding scholarships for minority students. On June 17, Quaker Oats announced that the Aunt Jemima character would be removed from the product's packaging and that the brand name would be changed, though plans for revised brand name were not announced. This case focuses on the decision of what the new brand should be, and how this new brand could be a force for good.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its 2020 annual meeting. All rights are reserved to the authors and NACRA. © 2020 by Joseph C. Miller and Michael A. Stanko. Contact person: Michael A. Stanko, North Carolina State University, Raleigh NC. mike_stanko@ncsu.edu

Airbnb: Unicorn struggles to restore trust

Amanpreet Kang, Yorkville University

Case Objectives and Use

This case is best suited for graduate courses and advanced level undergraduate courses in marketing, service marketing and business strategy. The case can also be used as an exam for assessing the theoretical understanding of the students. The case can be used as is when teaching online. The focus of this case is to examine the nature of service delivery in sharing economy and analyze the factors that influence service experience and service quality. This case highlights the challenges faced by the companies, evolving ecosystems, changing customer requirements and the nature of competition. The students will:

- perform PEST analysis to examine the macro-environmental factors influencing the company and its competitors in the industry,
- examine the dimensions of service quality in sharing economy,
- examine the factors that influence service experience in sharing economy,
- examine the dimensions influencing trust in sharing economy.

Case Synopsis

‘Airbnb is a business fuelled by trust’, said Brian Chesky in an open email sent to employees globally. He chose an apt subject for the message - ‘In the business of trust’. The San Francisco-based company faced a string of issues at its short-term rental locations globally (particularly in North America) and was facing criticism from all quarters. In his message, Chesky remembered that when he founded Airbnb in 2008, with Joe Gebbia and Nathan Blecharczyk, the naysayers rejected the idea saying that ‘strangers will never trust one another’. But the three friends envisioned to ‘create a world where anyone can belong anywhere’. After more than a decade, Airbnb indeed existed everywhere. But after witnessing unparalleled growth and success, the challenges that the company faced were multifaceted – bad host and guest experiences, violence at the booked sites, disruption of peaceful neighbourhoods, regulators banning short-term rentals and many more. As Airbnb geared up for its much-hyped public listing, will the leadership find solutions to the problems that Airbnb faced? This case explains the growth of Airbnb and the development of a new ecosystem related to the short-term rental industry. The macro-economic factors influencing the short-term rental industry are discussed and the future of this industry is also explained. Though the industry is experiencing growth, it is fraught with challenges related to regulatory, consumer experiences, service experiences, service quality and consumer trust. This case examines the sources of these challenges and poses question on how firms like Airbnb should design and manage their service experiences, service quality and eventually consumer trust.

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TymeBank: Chasing the next million

Michael M. Goldman, University of San Francisco & University of Pretoria
Nicola Kleyn, University of Pretoria
Luisa Mazinter, University of Pretoria

Case Objectives and Use

This case is appropriate for advanced undergraduate and MBA courses focused on Marketing Strategy or Marketing/Brand Management. At both levels, the case will be valuable in generating discussion on market analysis, and how to launch and grow a new challenger brand. This case is unique and interesting to students because it examines a brand launch campaign in a competitive and challenging emerging market banking context, details the success of this fintech start-up's mobile-first digital marketing campaign, and challenges students to propose a marketing strategy to further grow customer acquisition and usage. By the end of the case study, students will be able to: Evaluate the marketing environment; describe and justify a new brand's competitive positioning and value proposition; critique an integrated marketing communications campaign; and identify and critically analyze strategic marketing choices and argue for a recommended course of action.

Case Synopsis

Luisa Mazinter, the CMO of TymeBank, was tasked in 2018 with designing and executing the marketing strategy to launch South Africa's first digital bank in a highly regulated environment, with strong traditional incumbents and a number of new digital players about to launch their own offerings. The South African retail financial services firms were highly profitable and the majority of consumers were under-banked relative to global norms. Banking fees charged by incumbents were high, preventing financial inclusion in a market characterized by poverty and unemployment. Consumer trust in banks was low, as were national savings rates. Many consumers found the language used by banks to be confusing, and experienced the process of opening an account both time and energy consuming. Against this backdrop, TymeBank entered into a distribution partnership with one of South Africa's leading grocery retailers, the Pick n Pay Group, to offer South African consumers an easily accessible and affordable banking offering. In record time, Mazinter and her team developed an integrated marketing campaign using a small above-the-line budget, agile online campaigns, and in-store activations to geographically target consumers, position the brand as uncontrived, authentic and accessible, and provide relevant calls-to-action. Nine months after the launch, TymeBank had been described as one of the fastest-growing digital banks in the world. Although the brand launch had been successful across a number of measures, Mazinter knew that maintaining this momentum in the coming year would present additional challenges. This case documents the establishment and launch of TymeBank, and presents the marketing challenge facing Mazinter at the end of 2019.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor manual were anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 10-12, 2020. © 2020 by Michael M. Goldman, Nicola Kleyn, and Luisa Mazinter. Contact person: Michael Goldman, University of San Francisco, Suite 438, 101 Howard Street, San Francisco, mmgoldman@usfca.edu.

Shaping Products, Inc.: Managing sales in a changing market

Earl D. Honeycutt, Jr., Elon University

Sharon K. Hodge, Elon University

Case Objectives and Use

This case would be appropriate for a variety of classes to include: Graduate marketing management or sales management, undergraduate marketing policy, marketing strategy, sales management, or business-to-business marketing. Case objectives include: Understand how sales and marketing functions in a Business-to-Business environment; explore the importance of leadership and synergy in a medium-sized firm; and examine operational and technological changes to retain competitiveness.

Case Synopsis

Based on actual events in 2015 to 2019, this case examines sales management and supply chain issues facing Shaping Products (disguised), a leading US manufacturer of private label legwear products for both the women's and children's markets. Like many manufacturing firms in today's fast-changing macro-environment, CEO John Davison found himself facing rapidly changing technology coupled with business customers who demanded the best product, lowest price, and fastest on-time delivery. To better identify challenges and opportunities for improvement, Davison engaged Bethany Johnson (an MBA student who worked at Shaping Products) to conduct a sales audit that drilled down to uncover how the sales force was managed and interacted with other company departments. Depth interviews with firm executives, members of the sales team, and cross-functional manufacturing teams revealed that the sales personnel were actually account managers who were also expected to take the order, oversee order entry and quality control, monitor shipments, stock levels, and ensure customer satisfaction. These account managers, who held the title Sales VPs, often had difficulty monitoring the process, given that many did not reside near the manufacturing site. Bethany also discovered employees felt CEO Davison followed a laissez faire approach to sales management (which he acknowledged but felt was overstated). While the Sales VPs/Account Managers liked reporting to the CEO, especially one that is hands off, communication and coordination problems with manufacturing were evident. While not the initial goal of the audit, the findings pointed to a company grappling with a changing customer base, partnerships, firm organization, and CEO responsibilities. Bethany must now prepare a presentation with recommendations for CEO John Davison. She feels certain that the sales and manufacturing areas of Shaping Products need to become more closely aligned and the company as a whole more technologically savvy, but the proof is in the pudding—what specific changes should Bethany recommend to her CEO and, more importantly, what justification in the form of improved operations, increased profits, and better satisfied customers will persuade what appears to be a skeptical CEO to accept a different operating mode for the firm's sales effort?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Earl D. Honeycutt, Jr. and Sharon K. Hodge Contact person: Sharon Hodge, Elon University, 2075 Campus Box, Elon, NC 27244, (336) 278-5926, shodge@elon.edu

Total Logistics

Silvia Cacho-Elizondo, IPADE Business School
Francisco Espinosa Manzo, IPADE Business School

Case Objectives and Use

This case is designed to be used in executive Top Management programs as well as MBA and master's degree programs. Additionally, it could be used in focused programs. The case explores topics such as: a) the role of the Board in the Marketing Strategy and new customer acquisition, b) the new customer acquisition process in B2B markets, c) the evolution of the Marketing Strategy, d) the use of digital campaigns to generate leads, and e) the closing of sales.

Case Synopsis

The case presents the problem of how to increase sales and profits in a medium-sized logistics services company (B2B) through new customers acquisition. Founded in 2010, Total Logistics offered integrated logistics services to companies located in other countries that wished to sell/distribute their products in the Mexican territory. By 2019, the company had more than \$500 million pesos in annual sales and was generating profits. However, it only had 3 active customers. The problem was further exacerbated by the fact that the company had not obtained a single new customer in over two years. The company's owners, Mariana and Sophia Fernández, were desperate. This was all happening despite the strong involvement of the management board, including the owners and the general manager, in the marketing strategy and, particularly, in the objective of getting new customers in order to double the company's profits within three years. Another topic of concern was that one of these three active customers represented nearly 70% of the company's total sales, which meant that there was a strong level of dependency, and that company's very survival would be at risk if it ever lost this client. As this was a very profitable client, it was also extremely attractive for the competition. The case describes the company's history and its struggles from the marketing point of view, its commercial organization, and the actions that the general manager and the Board had implemented for several years in their efforts to solve the new customer acquisition problem. Some of the actions they had implemented, to no avail, included: making changes to the management board itself, replacing the marketing director, deploying a new sales force, increasing the marketing incentives, and launching digital campaigns to generate leads. None of these actions had worked, and the problem was becoming more and more critical every day: What could they do to get new customers?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, October 8-10, 2020. © 2020 by Dr. S. Cacho-Elizondo and Dr. Francisco Espinosa Manzo. Contact person: Dr. Silvia Cacho-Elizondo, IPADE Business School, s.cacho@ipade.mx

Promotional industry merchandise – Market expansion vs. market development: The case of Crescent Enterprises

Nida Aslam Khan, Karachi University
Jami Moiz, Karachi University

Case Objectives and Use

The case may be used in a seminar (such as a seminar on strategic marketing, or on using business case studies as a successful teaching pedagogy), an undergraduate class in strategic marketing and graduate class in marketing and branding. The objectives are:

- Understand four common approaches of strategic growth: market penetration, product development, market development, and product diversification
- Learning how to apply to these approaches under the Ansoff Strategic model and tool in different business situations
- Explore how businesses and entrepreneurial ventures can lead to category development on a small to large scale.

Case Synopsis

The case discussed is based on actual events that took place in Karachi, Pakistan, and describes a perplexing challenge faced by Noor Muhammad. Muhammad, the president of Crescent Enterprises was concerned about how to fully utilize the new manufacturing facility of the company in the face of lower demand. While the company was built to fulfil higher demand being faced, the dilemma occurred when it was under-utilized, and led to more loss than profit for Muhammad. Muhammad must make a quick decision between developing the local markets to tap into new consumer groups, and expanding via international channels by showcasing products in global trade shows. The case closed with Muhammad imploring about which path to choose – which would be more beneficial for his brand and company over the long run, before the new facility becomes a liability instead a source of profit and economies of scale.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by [Dr. Nida Aslam, and Jami Moiz]. Contact person: [Dr. Nida Aslam, Institute of Business Administration, Karachi, Main Campus University Road, Karachi – 75270, Pakistan, 92-21-3810470092 (ext: 2628) , nakhan@iba.edu.pk].

Nutrilov – The dilemma of healthy packaging for granola bars

Nida Aslam Khan, Karachi University
Jami Moiz, Karachi University

Case Objectives and Use

The case may be used in a seminar (such as a seminar on strategic marketing, or on using business case studies as a successful teaching pedagogy), an undergraduate class in strategic marketing and graduate class in marketing and branding. The objectives are:

- Understand how attitude towards product packaging can have a direct influence on attitudes towards a brand through influencing a consumer's attitude via judgements and emotions
- Learning the different ways through which packaging influences product purchase, and influencing these to increase product consumption and purchase
- Explore how small business and entrepreneurial ventures experiment with consumer experience through focusing on branding and packaging to create demand for their product, and even grow product categories!

Case Synopsis

Madiha is the founder and CEO of Nutrilov, which is a small entrepreneurial venture in the healthy snacking category of Pakistan. While Nutrilov had received a genuinely positive feedback in the initial launch phase, Madiha was now facing repeated complaints of the product going soggy, or being un-fresh if consumed at intervals. Knowing that snack bars were not consumed in one go, but rather at different times of the day, Madiha knew that she needed to address the issue to be able to sustain her business. One of the options was asking her consumers to keep the product in a cool place. However, Madiha knew most of her consumers were on-the-go, and a cooling facility was not always present for them. The case closes with Madiha contemplating to change the product packaging, and wondering how to go about it given her limited resources, and narrow financial support.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by [Dr. Nida Aslam, and Jami Moiz]. Contact person: [Dr. Nida Aslam, Institute of Business Administration, Karachi, Main Campus University Road, Karachi – 75270, Pakistan, 92-21-3810470092 (Ext: 2628) , nakhan@iba.edu.pk].

Challenges at Saint Catherine's College Summer Theatre

John F. Dion, The College of Saint Rose
Susan Daniels, Amherst College

Case Objectives & Use

This case was designed for undergraduate students taking "Introduction to Marketing" or "Marketing Management." The objectives are:

- Consider both short-term and long-term goals.
- Consider the wants and needs of different market segments.
- Consider how to tailor the marketing mix to attract different market segments.
- Consider how differing marketing strategies are needed to recruit and retain customers.
- Evaluate the potential risk and rewards of various growth strategies.
- Explore the role that mission and values play in organizational decision making.

Case Synopsis

This disguised case, based on actual events, describes the challenges facing a non-profit, non-union summer theatre. The theatre was facing its first budget shortfall in 25 years. While donations, sponsorships, and revenue generated from its children's productions were on budget, revenue generated from sales for the mainstage productions was not. The audience for these shows was aging, and the theatre had not been successful in attracting a sufficient number of new patrons. The older and younger patrons differed regarding preferred genre of play. Additionally, the theatre held its productions in a unique venue, a circus tent. This tent was very popular with current patrons but had limited seating capacity compared to an available traditional theatre. The current patrons wanted a number of actors to return to the theatre but these actors had joined the actor's union and therefore could no longer perform at the theatre. The children's theatre seemed to have potential to grow although the actors preferred performing in shows geared to adults. The effort to promote the theatre was somewhat limited. Marketing manager Daniel had to develop a plan to return the theatre to profitability. He had many potential strategies to consider. Each option had potential advantages and disadvantages and different levels of risk. He could adjust the marketing mix in a variety of ways to operationalize the chosen strategy. The fact that this case involves a non-profit might encourage students to consider the role that mission and values play in decision making. The theatre's offering is not a traditional product, which might encourage students to look at the concepts of "product" and "product development" more expansively.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Dion, J & Daniels, S. Contact person: John Dion, The College of Saint Rose, 432 Western Avenue, Albany, NY 12203, 774-420-0438, dionj@strose.edu.

Herz: What next...The next big leap

Rajani Ramdas, CHRIST (Deemed to be University)

Case Synopsis

HERZ is a multinational company with its presence in more than 30 countries throughout the world. They have their manufacturing plants mostly in Europe from where the products are distributed to their other business destinations. The case revolves around the decision the company wants to take regarding their market entry to India considering the lucrative business opportunity. Mr Faisal Abbasai was given the responsibility of preparing the feasibility report and appraise the board. HERZ has a division that manufactures taps and mixers. The Company at present has its sales and distribution office only in the Middle East to cater to markets all over Asia. The division is doing extremely well. The company planned to expand its business into other parts of Asia. Considering the lucrative market in India and the advantages to the brand by expanding its business to meet the growing needs of its customers, yet they are in a dilemma of whether they should start their business in India or consider any other country and if they plan to go ahead then what could be the appropriate mode of market entry. The case includes details about the company, product profile, quality standards maintained by the company and the HVAC industry in India. The dilemma given in the case is a real-time problem that the company was facing. Abbasai, who was given the responsibility of preparing the preliminary report, had managed to collect some information to gain an understanding about the Indian market which is mentioned under “The proposal”. The case specifies only few key indicators considered to be important, thus it gives a scope of class room discussion on the process of conducting market research particularly primary market research; the key factors to be considered especially in case of new market entry could be discussed. The indicator like supply chain mechanism; distribution model and other factors though important but were not deliberately mentioned in the case predominantly to encourage class discussion on the relevance of these indicators to make a more informed choice. It is to make students understand the relevance of having a holistic picture rather than an incomplete database while making a decision on market entry considering the quantum of investment it would need.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Bemis: Managing a distressed client portfolio

Gustavo Calatrava, IAE Business School – Austral University

Javier J. O. Silva, IAE Business School – Austral University

Ariel Antolin, IAE Business School – Austral University

Case Objectives and Use

This case can prove particularly useful to address the topic of sales planning. By analyzing, discussing, and making choices about the case, students will learn to:

- Planning B2B sales, integrating primary market dynamics with the realities of its derived demand.
- Assessing financial results per account.
- Managing a client portfolio.
- Understanding the differences between B2B and B2C marketing.

This case is appropriate for MBA-level marketing courses, sales courses, and executive education programs.

Case Synopsis

In January 2016, Francisco Signori, business manager at BEMIS Argentina, a packaging manufacturing company, found himself in a quandary. SanCor, the Argentine dairy behemoth, which ranked second among his company's clients, accounting for 12% of its thermoformed overall sales and 13% of its gross margin, was facing a deep financial crisis. Although SanCor's issues were not new, some indicators raised red flags in Francisco's mind. He knew he had to make some quick decisions in order to minimize any negative impact that SanCor's eventual demise might cause on volume or contribution. Should BEMIS concentrate more business on its main account? Should the company focus on developing other competing accounts? If so, which ones? How would its client react to this? What would the competition do in the face of BEMIS Argentina's change in attitude?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, NACRA 2020, online, October 8-10, 2020. All rights are reserved to the authors and NACRA. © 2020 by Gustavo Calatrava, Javier J. O. Silva and Ariel Antolin. Contact person: Javier Silva, IAE Business School, Austral University- Mariano Acosta s/n Ruta Nac. 8 (B1629 WWA) Pilar – Buenos Aires - Argentina, jsilva@iae.edu.ar

Dos Hemisferios: Putting high quality Ecuadorian wines on the map

Jacob A. Massoud, Dominican University of California
Vafa Saboori-Deilami, Dominican University of California

Case Objectives and Use

The Dos Hemisferios case is appropriate for upper division undergraduate and graduate students in marketing and strategy courses. The learning objectives for the case include: 1) Present students with the unique environment and challenges that business leaders face when developing new businesses in emerging markets. 2) Generate a discussion on the rebranding strategy that Dos Hemisferios has proposed. 3) Provide an opportunity to evaluate sales data and distribution channels for the business. 4) Discuss the various assumptions managers must make when making decisions and formulating new strategies.

Case Synopsis

The Ecuadorian winery, Dos Hemisferios, had started out as a hobby in 1999, but quickly grew into a business and passion for the Wright family. After receiving an international award in 2009 for their Cabernet Sauvignon-Malbec blend called Paradoja, the winery realized its potential and made the decision to expand its vineyards and production of wines. The company invested \$10 million in a new plant in 2017, which provided the capacity to produce 500,000 bottles per year. This would bring Dos Hemisferios closer to its goal of 600,000 units of production by 2020.

Robert Wright, the Dos Hemisferios President, knew that the business would need to increase its sales significantly to finally reach profitability. In order to break even, he had estimated they would need to increase annual sales from about 250,000 units to at least 350,000 units. As part of their strategy to increase sales, Robert and his father, Guillermo Wright, developed a rebranding proposal for the next board of directors meeting. This rebranding initiative hinged on the belief that people in the Ecuadorian wine market did not know much about wine. To address this issue, they decided to be more specific in terms of what each of the Dos Hemisferios brands represented and to whom each would be sold. Additionally, Quito represented the largest wine market in Ecuador. In dollars, the Quito market comprised 46% of all wine sales. This market was important for Dos Hemisferios on several fronts, but primarily because it had the largest market potential in terms of size.

Recognizing the opportunities for growth in Quito, Robert and his team sought ways to boost total revenues in Quito to \$50,000 per month. However, the market posed several challenges, including a lack of awareness about Ecuadorian wines at bars, restaurants, cafés, and hotels and an unwillingness to try Ecuadorian wines. Robert understood that overcoming this negative mental paradigm and creating awareness about Ecuadorian wines would be critical for Dos Hemisferios moving forward. Robert wondered if the rebranding proposal they had prepared would be effective and if any other strategies should be considered to improve sales.

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Yun Dong Jia: A Silver lining on “Cloud” during Covid-19 lockdown

Caleb Huanyong Chen, Macau University of Science and Technology

Yuen Wah Li, Hong Kong

Allan K.K. Chan, The Open University of Hong Kong

Miu Yee Leung, The Hang Seng University of Hong Kong

Case Objectives and Use

This case is appropriate for senior undergraduate, MBA or executive students. It can be used in courses or modules in digital marketing, supply chain, retail marketing, e-commerce, entrepreneurship, and business strategy. After studying the case and working on the assignment questions, students will be able to:

- Understand new features of contemporary smart cash registers, including cashless payment (especially, mobile payment and facial-recognition payment), purchase-sales-inventory management, customer profile and store management.
- Identify opportunities, practices and impacts of digital technologies, such as cloud computing, big data and artificial intelligence, on retail businesses.
- Analyze business challenges under Covid-19 lockdown.
- Apply digital marketing approaches to retailing business practices to overcome the above challenges. For instance, social media marketing, personalized customer relationship management, omni-channel marketing and digital customer experience.

Case Synopsis

This case describes difficult situations facing Leo Shoudong Pan, the founder and CEO of Yun Dong Jia Technologies Co Ltd (YDJ). YDJ develops and sells smart cash registers, which provide a self-developed operating system and cloud computing services. Pan's goal is to build a network of 100,000 pieces of smart cash registers across China and it seems to be achieved soon. However, the Covid-19 lockdown suddenly halts everything: thousands of smart cash registers could not be delivered, technicians could not enter communities to set up devices for retailers, meetings for business development are cancelled, and retail businesses are severely struck because customers are grounded at home. Pan rejected to just staying at home and waiting the pandemic out. But what could he do in the lockdown? How to drive sales of smart cash registers? For those retail stores that were suffering the impacts of the lockdown, how could YDJ help them with their business? He must make a marketing plan. Since YDJ's target customers are micro and small retail stores, Pan thinks that budgets and financial incentives are important to them. The Covid-19 pandemic was a challenge, but it could also be an opportunity to demonstrate YDJ's value. Positioning YDJ as a provider of cloud computing services for offline retailers, if Pan could help customers overcome challenges in such a tough environment, then sales and revenues will come to YDJ easily.

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Renoir Inc.: Make a jigsaw puzzle more than a jigsaw puzzle

Chandler C. Chu, Chung Yuan Christian University

Grace C. Su, McNeese State University

Ting-Yuan Huang, Feng-Chia University

Case Objectives and Use

The case can be used in undergraduate or first year MBA marketing management. We suggest placing the case in the first half of the semester, or following the topic of consumer behavior and the STP model. Students will learn through the case:

1. What the IKEA effect, a behavioral economics concept, is. The IKEA effect explains how a consumer's effort into producing or assembling the product influences the perceived value of the product he/she completes.
2. Apply the IKEA effect to decipher the jigsaw puzzlers' consumption behaviors. Then, apply the STP model to analyze the appropriate marketing strategy of different jigsaw puzzle business in Taiwan.
3. Understand how an entrepreneur develop a business model that can capture the consumer value created by the IKEA effect.

Synopsis

In 1990, at the Shi-Da Night Market in Taipei City, Taiwan, Li-Juan Huang opened her first little store, Renoir Jigsaw Puzzle. In 2000, Huang ran her second store in a mall near Taipei station, one of the busiest shopping center in Taiwan. In 2005, Heye, Educa, and Jumbo, three leading jigsaw puzzle manufacturers in Europe authorized Renoir as the exclusive retailer in Taiwan. In 2007, Huang expanded her jigsaw puzzle business to mainland China. In 2019, Renoir Inc. became the leading jigsaw puzzle company in greater China, and ran more than 50 retail stores in Taiwan, China, and Hong Kong. At the inception of her puzzle business, Huang targeted at customers who prefer images of artworks or picture books to images of cartoons or animations. Jigsaw puzzles of artworks are usually bigger and have more pieces, like 1000 pieces or above. It may take more than ten to twelve hours to put an artwork puzzle together. Huang also noticed that some of her customers would pay three-to-four times of the puzzle expense to frame the puzzle they assembled. In addition to framing, Huang also offered some high value-added services like free missing pieces and finishing last-mile assembly. Both services help her customers to finish the incomplete puzzle and motivate them to put the completed puzzle in a frame. Their framing business was more profitable than selling jigsaw puzzles. Although Huang seemed achieve significant success in brick and mortar world, she is not satisfied with the small revenue generated from physical stores. In 2020, the pandemic of COVID-19 made her realize that online channels may not only maintain her existing customers' loyalty but also attract new customers. But how could Huang reach new customers online? How can Renoir Inc. leverage its sophisticated service in the brick and mortar store to the online store? We believe the lecturer can lead his/her students to explore these questions after they understand the current target customer behavior of Renoir Inc.

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Digital Transformation of TSG from a B2B to a B2C company

Srinivas Pingali, Indian Institute of Management Udaipur
Grishma Shah, Manhattan College

Case Synopsis

Sunil Gopal, President of TSG, was jogging on a foggy morning in March 2009. He was enjoying the crisp weekend weather of New Delhi (India) and was planning for the week ahead. His train of thought was suddenly interrupted by his ringing phone. It was Raman Roy, founder of Quattro Global Services (QGS), the parent company of TSG. “Apologies for calling you on the weekend, Sunil, but I just received a call from our investors. They are very anxious about the dropping margins of the TSG business and want to review a plan on how this can be managed. They specifically asked me if we can focus more on the “direct to customer business concept.” Can we meet on Monday to discuss some options? We need to get back to them in two weeks with a comprehensive plan.” TSG (Technical Solutions Group), was the technical support division of QGS and focused on providing support to customers of large Original Equipment Manufacturers (OEMs) and Software Developers around the globe. His team of support engineers formed the largest division of QGS. Any revenue and profitability decline in this business had a significant impact on the parent company. It struck Gopal that in the two decades he had worked for Roy, this was the first time he had called him on a weekend. It was clearly a serious issue. The drop-in margins had been worrying Gopal for a while, and he had already started to put together some options with TSG's head of operations, Manoj Kumar. He went back home and started to look at the presentation Kumar had sent him a few months ago.

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Do we shop until we drop?

Michael A. McCollough, University of Idaho

Case Objectives and Use

The case is appropriate for undergraduate or graduate experiential learning courses such as student run business and internships where it can be used to demonstrate the Kolb model and the importance of reflection. All Universities have as a stated or unstated goal the creation of life-long learners. However, many schools do not formerly teach their students how to become life-long learners. The Kolb model is one keyway students can be taught to become lifelong learners. The case can be used in a Business or Marketing Strategy class as the case hinges on evaluating the organization mission in the context of WS revenues sources. Therefore, the case can be used to explore a common challenge, deciding what to do with a profitable product that may be at odds with the organizations mission and long-term goals. The case may also be used to prepare students for career placement interviews by teaching them a model to articulate what they have learned in current and past employment and leadership activities (student government, house activities, etc.) Potentially the course could be used in a Human Resource class by demonstrating that a disconnect between a highly profitable product that is low in employee intrinsic satisfaction and which does not enhance employee leaning, creating an organization conflict.

The course may also be used by an instructor to gauge student interest in creating a student run business. Students will learn:

- To determine if organizations goals are being met in the context of its mission and financial performance.
- How a student run business works.
- To apply the Kolb model to their own experiential learning classes, including internships and their own work experiences.

Case Synopsis

The case involves an important decision that Wildcat Solutions (WS), a student run business at the Inland Empire University, must make. The students must decide if they want to keep secret shops, a challenging and unpopular product that is nevertheless an important source of revenue for the class. Students will readily relate to the student protagonists both because of their similarity to the characters in the case as well as the experience some of them have had in employment opportunities where learning outcomes are often low even as they continue to work at the job because they “need the money.”

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Clearview AI: Picturing the future

Eric Dolansky, Brock University
Todd Green, Brock University

Case Objectives and Use

This case is designed to be used in core marketing courses (i.e. the first marketing courses taken by a student) at the undergraduate and graduate levels. It is intended to bring in ethical considerations in marketing decisions, both at an individual level and a company level. The case itself is written as a straightforward marketing decision (segmentation, targeting, positioning, with implied tactical questions) though more astute students may notice cues indicating that what Clearview AI does may be outside normal bounds of appropriate business behaviour. For this reason, we suggest placing the case near the beginning of the course, after fundamental concepts like segmentation, targeting, and positioning, and the 4 Ps (or 7 Ps) have been covered but before too much content has been explained. Doing so should teach students to consider the ethics of their decision-making during the rest of the course.

Case Synopsis

In early 2020 Clearview AI was a little-known company with a client list comprised of law-enforcement agencies. That all changed when a New York Times expose on the company and its founder, Hoan Ton-That, was published on January 18th, letting the world know what the facial-recognition company had built. Clearview AI became a huge news story overnight as journalists, government agencies, tech companies, consumer rights advocates, and interested individuals all weighed in on the company and its products. At issue was Clearview AI's tech, which enabled users to search Clearview's photo database of over three billion images. These images had been 'scraped' from the Internet, and an algorithm had been used to convert all faces into 'faceprints,' making them searchable. This system, in the words of law-enforcement clients, was way beyond anything previously available. Police had found success with the facial-recognition app, closing cold cases and identifying criminals and victims. The news media, though, focused on privacy considerations. Social media giants like Facebook and Twitter demanded that Clearview AI remove all images taken from their sites, citing a breach of the terms of service. With more publicity than ever before and a technologically advanced app, Ton-That was at a point in time when he could choose the future direction of the company, deciding who was the best potential customer and what Clearview AI would look like going forward.

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Oakville Improv Theatre Company: Sketching out the future

Eric Dolansky, Brock University (faculty)
Manvir Brar, Brock University (student co-author)

Case Objectives and Use

This case is targeted at an undergraduate marketing case course, specifically a non-introductory one. The key learning objectives (detailed below) have to do with tactics more than strategy, and implementation more than decisions. As such, it would be beneficial for the students to have already covered the basics of STP (segmentation, targeting, and positioning) and be familiar with marketing tactics (4 Ps or 7 Ps, depending on the model chosen by the instructor). As such, putting the case later in the course, as a way to recap strategy and tactics while teaching about implementation and action, would be ideal.

Case Synopsis

Looking out their window at the quiet residential streets surrounding their home, Duncan and Amy McKenzie reflected on the growth of Oakville Improv Theatre Company (OITC) leading up to March 2020. The couple had been co-proprietors since the business' inception in 2009, and later incorporated the not-for-profit in 2012. Although OITC's primary goal was not profit, that doesn't mean the business could consistently be operated in the red. The next step for the McKenzies and OITC was to execute the new five-year strategic plan, but they did not always feel they had the knowledge and guidance about the business aspects of OITC to make this possible. OITC's core goal was entertainment, specifically improvised entertainment for the local community. This included monthly showcases, quarterly special presentations, and classes for both paid members and guests alike. The majority of the talent on display at OITC came from the improv classes which the McKenzies taught. OITC's future hinged upon the success of its new five-year strategic plan, focusing on methods to deepen existing experiences for both performers and the local community, while also placing an emphasis on sponsorship and marketing. Ultimately OITC's goal over the next five-year period was the successful expansion while focusing on the core pillars of the new strategic plan. With these aims in mind, the McKenzies were looking to develop a set of tactics and a short-term plan of action.

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Paramount Sherbet: No time to cool down

Subhalaxmi Mohapatra, Anant National University
Soumya Sarkar, Indian Institute of Management Ranchi
Subhadip Roy, Indian Institute of Management Ahmedabad

Case Objectives and Use

The case is suited for discussion in a UG/PG program for courses such as marketing or marketing strategy. The case could also be used in an executive education program on heritage branding strategy.

The teaching objectives of the case are:

- Review the marketing strategy and growth of a heritage brand.
- Understand the dilemma faced by heritage brands to balance between vision and long term growth.
- Recognise the role of marketing and marketing communication in maintaining and sustaining a heritage brand.
- Evaluate and select among alternative strategies for growth.

The case could also be used in a course on services marketing to discuss the concept of service blueprint.

Case Synopsis

The present case study is based on primary data from Paramount, a hundred year old sherbet maker based out of Kolkata, India. The company set up in 1918 was producing and selling innovative sherbets through their only outlet in Kolkata. However, by 2018 the company was pondering on a growth strategy that would allow them to reach more customers and be present at new locations.

The case is built around three different alternatives in front of the protagonist and the case discussant. The first one is related to the status quo and is a low risk strategy. The second one is a growth strategy through addition of new outlets. The same strategy also has two separate modes. Both of these may ensure growth but comes with its own share of risk. The third one is to collaborate with food delivery apps. This would ensure a better reach in the present situation but has its own share of challenges. As the case closes, the protagonist must decide which option to go for after careful deliberation on the alternatives and the company's vision.

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Fair and Handsome: Faring not so handsome in BLM times

Semila Fernandes and Pooja Gupta, Symbiosis Institute of Business Management

Case Objectives and Use

The key teaching objectives are as follows: Understand the concept of Marketing Mix; explore the way companies introduce products considering the framework of segmentation, targeting and positioning; discuss the thought-process involved in deciding on brand extension and analyze the pros and cons of brand extension; determining the type of branding strategy suited for analyzing growth of the business using the brand relationship spectrum with special focus on sub-branding strategy; and determining the marketing strategy in case of social backlash.

This case study can be used as a part of a course on Product management, Product innovation, Marketing management, Product portfolio management, Brand Management and Communication and Product and Brand management. This case is designed for MBA level and Executive MBA level in the second year which would address marketing topics of new product development, 4 Ps, marketing strategies, product management, brand management and understanding how to create strong brands.

Case Synopsis

Emami's Fair and Handsome has garnered a market share of over 60% in the short period from the time of its launch. They had successfully created a "category" catering to the men conscious of their complexion and until then had largely used the "Fair and Lovely" and its equivalents. By 2020, fifteen years after its launch, Emami had realized that sheer brand extensions may only have a marginal impact. The growth in sales of the main product as well as its extensions was either declining or growing at a very small rate. With the flatlining of the sales of the brand in the recent quarters, Emami had to do something. The backlash against the "Fairness" platform on which FAH was based forced Emami to look at various alternatives it had in front of it. With the "Black Lives Matter" movement gaining ground, the backlash amongst fairness products was increasing. In such a scenario, the brand Fair and Handsome was facing an existential crisis.

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Kingfisher Ultra Max repositioning hurdle

Bikramjit Rishi, Institute of Management Technology (IMT), Ghaziabad
Archit Kacker, Hexaware Technologies, Noida

Case Objectives & Use

- To appraise about the product positioning in an emerging market.
- To recognize and discuss about a positioning plan for a new product.
- To apply describe the Kapferer Brand Identity Prism along with different competition levels for Kingfisher Ultra Max.
- To deliberate the marketing mix for improving the sales of Kingfisher Ultra Max.

The case is targeted at students of post-graduation and under-graduation programs in Business Administration, specializing in Marketing Management or Marketing Strategy. In addition, the case study can be included as part of courses related to Strategic Management and Competitive Analysis.

Case Synopsis

United Breweries Limited (UBL) was part of UB Group, which was a business conglomerate. United Breweries Holdings Limited (UBHL) or UB Group was headquartered at UB City, Bangalore, India. It dealt in many businesses out of which UBL was one of them. Kingfisher Ultra Max was Kingfisher's newest addition to the super premium strong beer segment. It was a lager based beer with 8% ABV content and was stronger in terms of alcohol content than Kingfisher Ultra, which was also from super premium segment. This brand's positioning was such that it targeted the premium segment. The top management was considering a change in positioning for their Ultra Max brand. A research report submitted by a premier business school also recommended for a change in positioning. The officials in the meeting are contemplating the two options for the change in positioning; one is to make the change of positioning across India, and the other is to make the change specific to some states.

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ORGANIZATIONAL BEHAVIOR/HUMAN RESOURCE MANAGEMENT CASES

Track Chair: John D. Varlaro, Johnson & Wales University
Track Co-Chair: Danielle Clark, Hillsborough Community College
Track Co-Chair: Nicole M. Amos, Johnson & Wales University

Cases	Authors
To tip or not to tip: The role of pay equity and motivation in the hospitality business	Janet Rovenpor Poonam Arora
Dr. Hedgewar Rugnalaya: Evolving through crisis	Shilpa Sawant Aniruddha Pandhare Urvi Talaty
A case of organizational change for DRDA	Alix Valenti
Starbucks Corporation in 2020: Addressing discrimination in public spaces	Kelly R. Hall Juane Greene Ram Subramanian
From department to practice: DM Fisher's HRM transition	John D. Varlaro Nicole M. Amos
KFC India: How HR took digital to the frontline	Ariya Chakravarty Akanksha Arora
Whistle the blow or let go! An ethical dilemma	Asad Ali Qazi Abdul Rehman Shaikh
Navigating a new job: The case of the entry-level engineer	Megan M. Douglas Sarah M. Holtzen Robert Hilton
Throwback Brewery: Performance appraisal decisions to ring in the new year	Danielle Clark Armand Gilinsky Jr Allo Gilinsky

To tip or not to tip: The role of pay equity and motivation in the hospitality business

Janet L. Rovenpor, Manhattan College
Poonam Arora, Manhattan College

Case Objectives and Use

The purpose of this case is to encourage students to think about the fairness of tipping as a way of supplementing the wages earned by wait-staff in the restaurant industry. The learning objectives are:

- Use Vroom's Expectancy Theory of Motivation to explain differences in effort, satisfaction and performance for employees being rewarded by two different compensation systems within the same business.
- Determine ways by which internal and external equity within and between organizations can be increased.
- Recognize what is required to roll out a new policy that challenges current norms and standards in an industry without generating negative backlash.
- Identify the multiple external stakeholders that are impacted by a human resource management decision.
- Explore the relationships between number of hours worked, wages, job meaning, job satisfaction and job stress in the restaurant industry.
- Formulate an effective implementation plan to address stakeholder concerns.

Case Synopsis

Danny Meyer, CEO of the NYC-based Union Square Hospitality Group, made a surprising announcement in late 2015. He decided to implement a no tipping policy in his fine dining restaurants, which included such well-known establishments as The Modern and Gramercy Tavern. For several years, he had witnessed the growing disparity in pay between front of the house employees (i.e., waiters, waitresses and bartenders) and back of the house employees (i.e., chefs, cooks and dishwashers). It was time, once and for all, to make a stand and do what was right. Equal pay for equal work would ensure greater employee loyalty, less internal resentment and increased productivity. Was this decision advisable? What are some of the steps that Danny Meyer would need to take to make sure the plan was successful?

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Dr. Hedgewar Rugnalaya: Evolving through crisis

Shilpa Sawant, S.P. Jain Institute of Management and Research
Aniruddha Pandhare, Expert Global Solutions
Urvi Talaty, Yale University

Case Objectives and Use

This case is intended for those teaching an intermediate and advanced course in Organizational Behavior (OB). The topics discussed in the case include organizational culture, impact of organizational design on human behavior, citizenship behavior, workplace deviance, grievance redressal and employee welfare, leadership (one-man and shared), consensus management, management structure, and outlining the functions, roles, and responsibilities. It is an ideal case to be studied by both, part-time and full-time management students. The objectives of the case are: To contrast the features of one-man leadership and shared leadership; to discuss the flaws of consensus management and identify the need of implementing a proper management structure and decision-making hierarchy; to arrive at the benefits and drawbacks of a labor/staff union in the organization and the influence it can have on the behavior of staff members in an organization; to highlight the importance of establishing a grievance redressal system and identifying the different reasons why staff members may grow discontented at work in the context of organizational growth as well as culture; to discuss the significance of clearly outlining the roles and functions of management leaders with emphasis on impact of organizational design on human behavior; and to introduce the concepts of negotiation and bargaining strategies in a conflict situation.

Case Synopsis

Dr. Hedgewar Rugnalaya (DHR), a not-for-profit hospital, was established with the primary objective of providing affordable healthcare services of the highest quality standards to the people of Aurangabad, India and its nearby villages in 1989. In its endeavour to continue that legacy, it faces a daunting challenge in August, 2014 - to fix the soured relationship with the staff and resolve their ongoing strike over the management's refusal to meet their salary and welfare related demands. The case highlights the circumstances under which unions are formed in the organization and how that leads to growing dissatisfaction and frustrations for both staff and the management. The last straw comes in the form of multiple rounds of failed negotiations with respect to demands over pay raises and staff welfare, finally resulting in a strike, which if not resolved quickly can lead to heavy financial and reputational losses for the hospital. A physical altercation within the ranks of the strikers brings to light the need to quickly resolve the strike and leaves Dr. Pandhare and Dr. Tupkary, senior management leaders at DHR, with two main questions to tackle. What actions are needed to be taken to resolve the strike and regain the staff's commitment toward their work at the hospital? What systemic change in the hospital's management structure is required to prevent a future fallout in the relationship with the staff?

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A case of organizational change for DRDA

Alix Valenti, University of Houston-Clear Lake

Case Objectives and Use

This case is intended to be used as either a stand-alone weekly case study or an integrative case study to be used as a teaching tool over several modules of the course covering organizational culture, structure and change. The objectives of the case are as follows:

1. Students will be able to describe an organizational culture using the Competing Values Framework.
2. Students will be able to identify the type of organization design that best fits an existing organizational culture.
3. Students will be able to recommend changes to organization design adapt to the changes proposed by the head partner.
4. Students will be able to identify the individual and organizational barriers to change and recommend ways those barriers can be removed.

Case Synopsis

This case focuses on organizational change, culture, and structure. Students are provided information about a relatively large accounting firm in Houston, Texas, and about the accounting industry in general. At the point of the case study, the head partner of the firm was looking to expand the firm over the following five years by acquiring other firms whose partners were reaching retirement age. He also wanted to increase the products and services offered by the firm. However, he recognized that several of his senior and longer-service accountants were resistant to his vision for the future and that he would need to get their support in order to expand the firm and its services to clients.

Students will be challenged with recommending to the head partner ways in which he can shift his firm's culture from a traditional, reactive organization to one that is much more proactive and customer-focused. They will be asked to identify the individual and organizational barriers to implementing change and how such resistance can be overcome. Students will be expected to become knowledgeable with the existing theories of organizational change, culture, and structure and to be able to apply that knowledge to the facts of the case.

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 8-10, 2020. All rights are reserved to the authors and NACRA. © 2020 by Alix Valenti, University of Houston-Clear Lake, Houston, TX, valenti@uhcl.edu

Starbucks Corporation in 2020: Addressing discrimination in public spaces

Kelly R. Hall, Stetson University
Juanne Greene, Stetson University
Ram Subramanian, Stetson University

Case Objectives and Use

The case is best suited for a graduate or undergraduate course in human resource management or labor relations. Since diversity is typically covered in the first third of such courses, the ideal placement of this case would be in the early part of the course. Since Starbucks is a well-known name and it is very likely that students have had their own experience with Starbucks, as either a customer or an employee, the case is likely to draw their interest.

After reading and discussing the case, students should be able to:

1. Recognize the link between human resource management and strategic business goals.
2. Identify the need for stakeholder management and how to evaluate stakeholder claims
3. Explain the complexity of diffusing human resource practices across organizational boundaries.
4. Differentiate between the business and ethical perspectives of diversity training management.
5. Analyze diversity challenges in the workplace through the lens of sustainable human resource management and propose a course of action in response to those challenges.

Case Synopsis

In February 2020, Unite Here, a labor union, released a damning report about employment practices at the airport Starbucks stores operated by licensee, HMSHost. Among other charges, the report identified several instances of racial and gender discrimination that HMSHost dismissed as a ploy by a union intent on organizing its employees. The adverse publicity, however, put Starbucks Corporation in the spotlight because of the company's publicly stated commitment to workplace equality. The recently hired Nzinga Shaw, the company's first ever Global Chief Inclusion and Diversity Officer, had to address the issue at HMSHost lest it adversely affect Starbucks' reputation as a progressive employer.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual online meeting, October 8-10, 2020. All rights are reserved to the authors and NACRA. © 2020 by Kelly R. Hall, Juanne Greene, and Ram Subramanian. Contact person: Kelly R. Hall, Stetson University, DeLand FL. krhall@stetson.edu

From department to practice: DM Fisher's HRM transition

John D. Varlaro, Johnson & Wales University
Nicole M. Amos, Johnson & Wales University

Case Objectives and Use

This disguised case describes a common occurrence at companies as they look to transition their HR Department from focusing solely on administrative HR to embracing strategic Human Resource Management practices (HRM)—effective recruitment that supports the company's strategy. The case introduces how companies transition their HRM practices by focusing on the first steps of writing job descriptions and developing recruitment plans that align with the talents needs of the company. The case is for introductory and/or general Human Resource Management undergraduate courses, and other courses that are first introducing the concept of strategic HRM while still acquainting students with HRM practices. The objectives are:

- Differentiate between administrative and strategic human resource management
- Identify the importance of job descriptions in human resource management
- Outline a job analysis process and write a job description
- Identify talent sources and write a job posting

Synopsis

Beverly Ross, the president and owner of DM Fisher, had recognized the need to improve the company's human resource management (HRM) practices, particularly those associated with talent acquisition and development. The past year has been particularly stressful for her employees due to the new tariffs on imports and the need to navigate those for clients. Yet, the need to improve HRM practices had become clear during the strategic planning, which occurred the year prior. Upon engaging in the strategic planning, Ross became aware of the need to make some of the more informal HRM practices more formal, while recognizing the need to improve other practices. Through the strategic planning process, employees were engaged in discussions meant to facilitate the development of the future vision and values of the company, as well as improvements on HRM practices such as performance management and development. Approaching retirements were also found as a looming issue, as much of the staff had decades-long tenure, with few, relatively recent hires persisting within the staff. Ross must determine where to start, to not only address the needs named in the strategic plan, but to also address the immediate staffing needs facing her managers, both of which seem inextricably connected.

The authors developed this disguised case, based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10. © 2020 by [John D. Varlaro and Nicole M. Amos]. Contact Person: [John D. Varlaro, Johnson & Wales University, 8 Abbott Park Place, Providence, Rhode Island, 02903, 401.598.1330, john.varlaro@jwu.edu]

KFC India: How HR took digital to the frontline

Arjya Chakravarty and Akansha Arora, Management Development Institute, Gurgaon

Case Synopsis

This case starts with the Leadership team deliberating on the evolving reality of the food retail and eating-out categories in a post Covid-19 world, as well as its bearing on what the KFC brand focuses on in the immediate future. Delivery has been the only channel of sale for the last two months, across the country, during the period of lockdown, and while system sales are down, as can be expected during this period, delivery has emerged as a clear future channel for growth. Aman Lal, the Chief People Officer (CPO) reflected on the work done over the last 24 months and how the seeds of being a digitally savvy organization had been sown in the 2018 Q1 HR Councils. The Recipe for Growth strategy at Yum! included an important growth driver of ‘Unrivalled Culture and Talent’. Quick-service restaurants (QSRs) were increasingly focusing on the opportunities presented by digital transformation. Millennials and Gen Z, who are the typical Target Group for the QSRs, are digital natives and there has been a growing expectation that restaurants adopt new technologies to offer better in-store and online experiences. As a result, organizations and the workforce have gone through massive change, and will continue to do so. With a largely Franchise business, the KFC Yum! HR team worked on a strawman of the KFC HR Digital strategy, which required the HR team to focus on:

- a. Strengthening engagement – creating brand advocates
- b. Winning talent and capability
- c. Making culture stick
- d. Making employees life R.E.D (Relevant. Easy and Distinctive)

The HR Councils were carefully nurtured over a period to become platforms for delivering on important agenda impacting the Culture and Capability across the Yum! and Franchise organizations. The leaders ‘listened’ deeply to their various employee groups at Team Member, Store Leader and Area Coach Levels and gained valuable insights to provide. Over a two-day working session, the strawman was discussed and deliberated amongst the HR Leaders to determine how the business objectives, on ground realities and best practices in the industry could be dovetailed to bring to life a digitally enabled function. The team also took the help of the CEOs to translate the thinking into execution sized bytes that helped create a prioritized road map of execution. As this plan got executed, the goal of the KFC HR leadership was to reduce the complexity around the functions for which HR is responsible, while increasing internal customer satisfaction.

Synchronously, it was about enabling digital touch points for the field workforce to make them early adopters of technology, and for them to experience the brand as R.E.D; in the same way that the brand was intended to be Relevant, Easy and Distinctive for the customers. The case ends in June 2020 as the first wave of pandemic gripped the globe. KFC must continue its journey and perhaps transform and challenge its agility, again. Is KFC ready for ‘The New Normal’?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case was made possible with the generous contribution from the present KFC Leadership team. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Whistle the blow or let go! An ethical dilemma

Asad Ali Qazi, Sukkur IBA University
Abdul Rehman Shaikh, Sukkur IBA University

Case Objective and Use

This teaching case is developed for class discussion in the module of Whistle-blowing or ethical dilemma. This module is usually part of several courses like Business Ethics, General Management, Operations Management, and Corporate governance. It can be used for class discussion on fraud or integrity issues at the workplace. The case is suitable to use with undergrad students. This case is written to understand the challenges of a manager when your subordinate involves integrity-related issues. The objectives are:

1. Demonstrate the fraud and integrity-related issues. Why and How happened?
2. Analyzed the role of organizational policies in the decision of blow the whistle
3. Assess the ethical dilemmas in which professional duties may conflict with personal ethics
4. Propose organizational policies to encourage whistle-blowing and to discourage the fraud or integrity-related issues

Case Synopsis

Mr. Qazi was sitting in his office in the Multan branch, reviewing his last month's KPIs when he got a call from his Town Operations Supervisor, Mr. Ahmed, based in Bahawalpur. Ahmed was recently promoted and transferred to Bahawalpur, from Multan branch. He informed Qazi about a huge inventory variances, which were not earlier reported by the previous Town Operations Supervisor, Mr. Sagheer. Qazi was informed that differences were very high when compared to the allowable company limit of Zero inventory variance. Qazi was worried about whether to report these differences to higher management or not. He was very well aware that reporting might even cost him his job, and that of Sagheer too. He could not see any solution to the recovery of the inventory or cash against the same. Should Qazi take a risk and let go of Sagheer? Should he report the differences?

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Navigating a new job: The case of the entry-level engineer

Megan M. Douglas, Missouri Southern State University
Sarah M. Holtzen, Missouri Southern State University
Robert Hilton, Missouri Southern State University

Case Objectives and Use

The case is intended for use in undergraduate courses in the areas of human resource management and organizational behavior. With an emphasis placed on recruitment and retention, understanding organizational culture and values, identifying elements of a high performance work system, and the importance of P-O fit, the case can be positioned anywhere in the course once these topics have been addressed. After studying this case, students should be able to:

- Identify and analyze counterproductive workplace processes and practices using the attraction, selection, and attrition framework.
- Identify and analyze elements of the organizational culture, including values and leadership.
- Identify how HR and organizational members can help create a high-performance work system framework as an alternative to the current organizational culture.
- Explain the importance of person-organization fit in retention and turnover decisions, from the perspective of both the individual and the organization.

Case Synopsis

This disguised case follows Christian, a recent college graduate who hoped to jumpstart his engineering design career by finding a job near his hometown. With a wife and small child, Christian sought to join a company that would allow him to engineer new design prototypes, while also understanding the importance of family, work-life balance, and flexible scheduling. Following an awkward interview process, Christian was hired by a local manufacturing facility as a mechanical design engineer. The case concentrates on Christian's employment journey and follows him through his first few months of employment. The case describes Christian's organizational entry experience, from his initial application through the end of his 90-day probationary period with the company. A focus is placed on different aspects of the human resource management functions, including attraction, onboarding, training, selection, and turnover/attrition. Company culture and values also play prominent roles throughout the case, as an additional focus is placed on the role of person-organization fit in the organizational staffing process. At the strategic level, this case also explores high-performance work systems as an alternative approach to the organization's current culture. As Christian struggles to navigate his new job, the company's culture, and the impact of the ongoing global health pandemic, he also contemplates his continued employment with the company.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Megan Douglas, Sarah M. Holtzen, and Robert Hilton. Contact person: Sarah M. Holtzen, Missouri Southern State University, 3950 E. Newman Road, Joplin MO, Holtzen-S@mssu.edu

Throwback Brewery: Performance appraisal decisions to ring in the new year

Danielle Clark, Hillsborough Community College
Armand Gilinsky Jr., Sonoma State University
Allo Gilinsky, Craft Beer Concierge

Case Objectives and Use

This field-based case was prepared for use in an undergraduate course in Human Resources. Instructors will find it useful to position this case relatively late in the course once the topics of managing employees, analyzing work and training/developing employees are covered.

This case could also be used in an undergraduate small business management course.

Learning Objectives

1. Understand some of the unique challenges facing the hospitality industry, particularly in the craft brewing segment
2. Explore essential elements of a performance appraisal system
3. Develop a process to set employee goals, identify behaviors that contribute to performance, and action steps to achieve outcomes.
4. Recognize some of the challenges associated with implementing a performance appraisal system.

Case Synopsis

Throwback Brewery, a small brewery and farm-to-table restaurant in New Hampshire had many things working in its favor: A loyal customer base, a strong culture and long-tenured Team Leaders that helped to make the brewery the success that it was. At the same time, Throwback struggled with internal issues such as pay disparity between employees and a lack of effective communication between the owners Nicole and Annette and employees. In hopes of improving upon the company's shortcomings and aligning Throwback for continued growth, Nicole and Annette considered establishing a performance management structure. This case shows the complexities of forming a performance appraisal system in an established company.

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SOCIAL IMPACT AND SUSTAINABILITY CASES

Track Chair: Maria Ballesteros-Sola, California State University - Channel Islands

Track Co-Chair: Elizabeth Ontaneda, Universidad Peruana de Ciencias Aplicadas

Track Co-Chair: Kyleen Myrah, Okanagan College

Cases	Authors
Klipfontein Care Village: Placing people at the centre of social cohesion	Armand Bam
The transition to green value chain at Parsa's – A case study	Insha Mir Farooq
For everything there is a season: New Life Mission's uncertain future	Robert MacDonald Heather Steeves
Cotopaxi: Maintaining a social mission during turbulent times	Jennifer DeBoer
tentree's business model for environmental stewardship	Jennifer DeBoer
Change in the time of COVID: Determining how a lived experience circle on homelessness adapts their team development model	Kyleen Myrah Kerry Rempel
Building an inclusive INGO: The case of international teams	Christina Walker
Nestle Waters North America: Accessing water from the Floridan aquifer	Michelle DeMoss Ram Subramanian James Beasley John Tichenor
Paloma Lopez - Fixing a broken food system and developing Future Fit Foods	Lihua Wang Gerardo Ungson Yim Yu Wong
Sean Ansett and workers' rights	Lihua Wang Gerardo Ungson Yim Yu Wong
Promoting SDGs through entrepreneurship in post-insurgency Northeast Nigeria: Case studies from Impact+	Fardeen Dodo Lukman Raimi Edward Rajah
Spoontainable: A sustainable entrepreneurship case	Leif Brandle

Cases	Authors
Pressure on plastic? Responding to consumer pressure and the threat of plastic legislation	Claire Barnardo Rosalind Dos Santos Geoff Bick Nicola Weaver
Water in the desert? Oil India's CSR impact in Assam	Vidhi Chaudhri Asha Kaul
Moltacte: A people-centered social enterprise	Alfred Vernis Suzanne Jenkins Lisa Hehenberger
Conflict mineral rule in the US: Repeal or reform	Debapratim Purkayastha Syeda Qumer
APY Art Centre Collective: Taking art to the city	Sheri Lambert Theodore Hill Kathryn Ready
Creating change through social innovation: The case of girls' school dropout in Uganda	Isa Nsereko Alex Bignotti Mohamed Farhoud
The Bee Community: Work & belong	Hannah Grubbs Madelyn Karnei Erin McGregor
CSR at Axis Bank: Striving for a sustainable future	Mahendra Gujarathi Samir Barua
Direct Relief: Rekindling a tradition of value driven efficiency in global humanitarianism	Manuel Hensman Maria Ballesteros-Sola Dean D. Axelrod
Go Baby Go: Scaling a social movement around mobility	Maria Ballesteros-Sola Stephanie Raible

Klipfontein Care Village: Placing people at the centre of social cohesion

Armand Bam, University of Stellenbosch Business School

Case Objectives and Use

This field case is aimed at post-graduate level courses exposing students to a range of issues at the intersection of people centred organisational culture (PCOC), critical decision making, diversity, inclusion and social cohesion and the ethic of care. The additional complexity is contributed through the protagonist's experience as a woman in leadership.

Case Synopsis

It was the morning of the 24th March 2020, Leah Maharaj had just left home for work when she started to reflect on the announcement of the impending lockdown the night before. Thoughts started racing through her mind about the last 7 years of leading The Klipfontein Care Village (KCV), a non-profit that had a significant impact on society. A sense of panic and anxiety hit as she reflected on the executive committee's desire for a new type of leadership, the reason for her recruitment. She recalled that in her interview, one board member suggested they needed a leader "that embodied the nature of our 'business' – caring". Having previously, managed a non-profit organisation, Leah was familiar with this type of expectation. What made her accept the challenge she thought, was that "this centre was special because it provided affordable accommodation and care that was accessible to the man on the street". The services were multidimensional starting with independent living and over-time residents could move to the frail care facilities. Leah, knew that for many of the residents, this was their final home and in taking up the position as the Executive Director, she wanted to shift the culture, from the institutional medicalised approach to an organisational culture that was people centred. As she continued to drive, she remembered the village's previous management failures and client and staff experiences which she believed she had made some headway in addressing. The health and safety of residents was a priority and it was important for Leah to ensure they prevented an outbreak which would have huge impact all round. Leah considered there would be reputational issues as well as they were not resourced to address an outbreak. The way in which decisions had to be made was antithetical to the shaping a people centred culture challenging their aspirations as the autonomy of residents was restricted. Leah understood there were a range of challenges for her, beyond the spread of the virus she feared her actions would threaten the general harmony and social cohesion at KVC.

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The transition to green value chain at Parsa's- a case study

Mir Insha Farooq, Central University of Kashmir

Case Objectives and Use

This case is most suitable for graduate and post-graduate level program ideally in business strategy concerning a bigger gambit of sustainability. The aim is to make students deliberate on prospects and challenges of green practices and developing an understanding of the significance in transacting to greener strategies in a value chain, unequivocally focusing on the concept of growing conscious consumer behavior segment. Upon completion of this case study, the students will be in a position to achieve the following:

- Identify factors which necessarily force organizations to transit to green values;
- Develop business propositions using environmental focused strategies;
- Critically evaluate green conscious consumer segment.

Case Synopsis

Parsa's is a case about a quick service restaurant in an Indian scenario, a market which faces the harsh realities of environmental degradation. In a very short span of time, Parsa's has evolved as a reputed brand- steadily growing with around sixteen outlets across different parts of the India, majority of them are in Jammu and Kashmir. The landmass of Indian sub-continent is getting buried under its own garbage with the country adding more than one lac- fifty thousand metric tonne of waste every day. This unmanageable waste generation which is piling up adds to pollution of land, air and water. A very few businesses in India are depicting responsible behavior towards environmental sustainability. In order to curb this menace, the Government of India came up with one time plastic ban on October 2nd, 2019. At Parsa's, Javeed- it's owner had already envisioned back in 2018 to transit to greening their business activities. The organization's greening was providing a unique selling proposition. But they were still in early transition. There was a long way to go. Indian market being an emerging one is yet to adopt green practices and Jammu and Kashmir is no different from the rest of the nation. But Parsa's had to now think beyond the plastic ban which was now mandatory to all and this strategy will no more provide competitive advantage. Both the partners were unsure whether the consumers were ready to adopt the extended green practices which they wanted to instil. Javeed, being a management student, suggested conducting a survey in the Kashmir region since their QSR had major market share in most of the districts from the valley. The decision to transit to green processes incrementally or in one go, were taken based on the results of the survey.

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For everything there is a season: New Life Mission's uncertain future

Robert A. MacDonald, Crandall University
Heather Steeves, Crandall University

Case Objectives and Use

This case was written to emphasize the importance of effective governance practice and managerial decision making within a nonprofit institution (NPI). The narrative is intended for use in undergraduate strategic management courses, or in courses that discuss the governance and/or management of NPIs. While this case was not written expressly with accounting courses in mind, it may be useful in developing an understanding of financial reporting in nonprofit organizations. Prerequisite student knowledge includes a basic understanding of governance theory, NPI operations, and financial analysis. Specific learning objectives for the case include the following:

- Exploration of issues surrounding NPI leadership in relation to a governing board
- Consideration of issues pertaining to NPI governance (board composition and effectiveness)
- Exploration of NPI financial management
- Application of the balanced scorecard in an NPI context
- Consideration of NPI strategic management

Case Synopsis

In May 2019 Pam Carlin, Executive Director of the Moncton, NB based New Life Mission is contemplating the future direction of the nonprofit institution. As an organization founded to work with “at risk” children, the Mission has seen both its client and donation bases erode. Pam is convinced that the former is due to the ongoing gentrification of the city core - there are simply not as many families living in the neighbourhood of the mission - and that the latter is due to the ongoing change in how donors behave - people don't seem to commit to supporting a single cause over the long term the way they used to. Pam has attempted to raise these issues with the Board, but the response has been tepid at best - is this the result of simply not having enough board members? Or is it due to having the wrong people on the Board? As the narrative draws to a close Pam is left wondering whether the Mission's “season” has ended.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Robert A. MacDonald and Heather Steeves. Contact person: Robert MacDonald, Crandall University, Moncton, NB, Canada. robert.macdonald@crandallu.ca.

Cotopaxi: Maintaining a social mission during turbulent times

Mikayla Barnes, Ripon College (Student Author)
Jennifer DeBoer, Western Colorado University (Faculty Instructor)

Case Objectives and Use

This case was written for use in the corporate social responsibility and environmental sustainability section(s) of a strategic management course at the undergraduate level. It may also be used to teach topics related to crisis management. The case objectives are as follows:

- Understand how businesses continue to give back during difficult, recessionary periods determine whether cutting costs disrupts traditional business operations
- Learn how to apply strategic management theories and principles to unprecedented situations that involve both social and environmental initiatives within a company
- Explore and debate various methods that leaders and CEOs can use to adapt to a challenging and unexpected event, such as Covid-19, and analyze strategic changes made within the company in response to a crisis

Case Synopsis

This case, based on actual events and factual evidence, describes the methods that an outdoor gear company with a fascinating social mission at its core, Cotopaxi, took when facing a difficult loss of revenue and sales due to the novel Covid-19 pandemic. Founder and CEO of Cotopaxi, Davis Smith describes the profound impacts that the crisis has had not only on his business but on several others in the outdoor industry. Using his entrepreneurial problem-solving skills, Smith and his team work together to find ways of surviving and thriving, while keeping Cotopaxi's mission of "doing good" and giving back to others at the utmost importance.

Davis Smith's initial reaction to the pandemic was similar to many others—afraid and uncertain of what would occur in the months following the peak of the crisis. Yet, soon afterward, Smith found himself needing to take a stand as a leader of the company and working to change his mindset. Smith discovered that the best plan of attack for Cotopaxi and the team of employees was to discuss methods, ideas, and processes to implement to overcome the recent challenge as a unified team. By crowdsourcing several ideas and bringing together his team, Smith decided the best plan of action needed to meet demand and utilize each integral component of the business.

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tentree's business model for environmental stewardship

Chan Khine, Ripon College (student author)
Jennifer DeBoer, Western Colorado University (faculty supervisor)

Case Objectives

In this case, we focus on exploring tentree's business model. tentree's business model differs considerably from other businesses focused on environmental sustainability, as tentree plants ten trees for every item sold. As a certified B-corporation, tentree seeks to balance purpose and profit. This case provides students an opportunity to analyze a unique business model focused on environmental sustainability. This case was written for use in the corporate social responsibility and environmental sustainability section of a strategic management course at the undergraduate level.

Case Synopsis

tentree was founded on the philosophy to make an eternal commitment to the environment and the creatures living in it. So, the business planted ten trees for every product purchased to promote a message that an individual does not have to do a lot to care about the environment. tentree case study examines how the business grew to be successful while promoting their values to a niche market of environmentalists and how tentree's values are integrated to create a sustainable business model. tentree was launched in 2012 and after three months, the company earned \$120,000 in sales. In 2016, tentree became a certified B Corporation. Even though the company does not release its financial statements, according to their website, they have already planted over 43 million trees. tentree's vision was to plant 1 billion trees by 2030. The case explores the products that tentree produced and discusses how the materials that tentree used for its products are sustainable. To manufacture ethically, tentree create a code of conduct for their suppliers and the company only worked with WARP (Worldwide Responsible Accredited Production) approved factories. tentree effectively used social media to convey its story and promote its brand message. The company partnered with the Canadian Wildlife Federation to create videos that inspire the younger generation to connect with nature. The company used Facebook to provide content and build a community and YouTube to share videos about how the products are manufactured sustainably. tentree used Instagram to test contents that would be used on its website. Furthermore, tentree also created the most sustainable post on the planet for Earth Day, 2019, to promote awareness for planting trees. To ensure that trees are being planted and there are no adverse effects on the environment, tentree only partnered with not-for-profit organizations that have long standing relationships with the community. Planting sites were also audited to be certain that they have an impact on the environment and the communities. tentree did not only plant trees in these areas, they also educated the villagers on sustainable methods to plant and care for the trees. This created massive environmental and social impacts on those communities.

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Change in the time of COVID: Determining how a lived experience circle on homelessness adapts their team development model

Kyleen Myrah and Kerry Rempel, Okanagan College

Case Objectives and Use

This case is situated in a non-traditional team setting. The issues explored in this case are team development, effectiveness and response to change. Students using this case will develop insights on diverse teams and diversity within teams, they will be exposed to challenges and advantages of working with individuals with lived experience of homelessness and provided a practical view of why the thoughtful construction of a team and its structure is important for long term success. This case is suitable for both undergraduate and graduate courses. The case is ideally suited for management courses focused on organizational behaviour, organizational change and development courses and social innovation courses. In other disciplines, this case has suitable context and content for courses in Social Work, Community Development, Public Administration and Political Science. In particular, this will be of interest to students who will be working in the areas of homelessness, vulnerable populations, or doing community engaged projects.

Case Synopsis

A common issue facing organizations today is how to create effective teams that are able to manage change and remain productive during times of instability. Under normal circumstances this is a challenging task, but the level of difficulty increases when the members of the team are demographically diverse and have lived experiences of homelessness, past addictions, and trauma. Add to this the complexity of building a new team during a global pandemic that restricts movement, isolates already marginalized team members, and effectively severs key forms of communication. This is the situation facing the members of the Lived Experience Circle on Homelessness (LECoH) led by Gerard Joyal in March 2020. Joyal describes how in the course of two days LECoH moved from holding interviews for new members and feeling excited about the prospects of having additional people join the group to continue their vital work, to a scenario where it was unclear how the group would continue. The case discusses how the LECoH team was formed, how the structure evolved and developed and identifies the key elements that led to successes for the group. It discusses how group norms were created and maintained and how they intended to continue to build those norms with their future members. Now Joyal and the remaining LECoH members must devise a way to have the voice of lived experience continue to drive the system change forward during a time when those experiencing homelessness or individuals on the cusp of homelessness are most at risk. Their team has never been more necessary, nor more vulnerable.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Kyleen Myrah and Kerry Rempel. Contact person: Kyleen Myrah, Okanagan College, Kelowna, BC, kmyrah@okanagan.bc.ca or Kerry Rempel, Okanagan College, Kelowna, BC, krempel@okanagan.bc.ca

Building an inclusive INGO: The case of international teams

Christina Walker, University of Redlands

Case Objectives and Use

This case is designed for a master's level course on the topic of Diversity, Equality, and Inclusion (DEI) and could support student learning about DEI in most management/leadership courses. This case could also be used in other courses such as nonprofit leadership, to explore particular challenges in managing an NGO, intercultural communication, to examine Western and Majority World perspectives, or global finance, to inspire discussion on the financial implications of having a diverse staff. The objectives are as follows:

- Identify the main challenges and opportunities in regard to DEI.
- Ascertain a key inclusion issue that needs to be addressed.
- Craft a management recommendation that is supported by DEI concepts.

Case Synopsis

When Stephen Freed became CEO at International Teams, he had envisioned the US-based nonprofit becoming a culturally inclusive international nongovernmental organization with a global-shared-leadership structure. In the ensuing years, he had witnessed huge strides in realizing the vision: senior leadership now represented twelve different nationalities; the number of fulltime, multinational teams had grown to about 500 working in 40 different nations; and, the goal of sending workers “from everywhere, to everywhere” was more and more an organizational reality. While these leadership changes did create a more inclusive organizational culture, it did not take long to uncover many challenges to a true sense of equality among the diverse organizational staff. There were three financial hurdles the organization faced: salary disparities between multinational team members, operational and administrative costs that fell disproportionately on Majority World staff, and cultural differences in the way money was viewed when it came to strategic planning. Eventually, the financial pressures began to cause conflict. During a particularly contentious debate, it came out that four of the Western senior leaders had begun meeting separately from the rest of the team. When asked why, one leader admitted they felt that, “If we're raising the most money, we should have a bigger say in what goes on.” As the case closes, Freed is faced with the possibility of a mutiny and must chart his management course. Student are invited to make a recommendation for how Freed should respond.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. This case is based on actual events with minimal disguising. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Christina Walker. Contact person: Christina Walker, University of Redlands, 1200 E. Colton Ave., Redlands, CA 92373, 909.748.8720, christina_walker@redlands.edu or mailforchristina@yahoo.com.

Nestlé Waters North America: Accessing water from the Floridan aquifer

Michelle DeMoss, Stetson University
Ram Subramanian, Stetson University
James Beasley, Stetson University
John Tichenor, Stetson University

Case Objectives and Use

The main focus of this case is water conservation and the balance between the ecosystem's, individual's, and corporation's right to access water, especially pure, fresh water. Therefore, the case raises ethical and sustainability questions that require a strategic analysis from the perspective of the decision maker. The case would work well in an undergraduate course in business and society, a senior-level undergraduate or first-year graduate course in sustainability management.

Case Synopsis

Our Santa Fe River, Inc, is a nonprofit organization committed to protecting the waters and lands supporting the aquifer, springs, and rivers that drain into the Santa Fe River in northern Florida. Michael Roth, president of Santa Fe River, is faced with the decision of how best to lead this organization in protecting the Santa Fe River watershed from Seven Springs Water Company (Seven Springs) and Nestle Waters North America's (NWNA) intent to withdraw 1.152 million gallons of spring water per day for NWNA's bottled water business. Seven Springs Water and NWNA had filed an appeal to the Division of Administrative Hearings (DOAH) preempting the Suwannee River Water Management District's (SRWMD) proposed denial of the renewal of the water use permit to source water from the springs at Devil's Eye Complex, which was part of the watershed for the Santa Fe River. Michael Roth and Our Santa Fe River (OSFR) board needed to decide on the optimal response to support efforts to finalize the denial of this water use permit. The administrative appeal process took approximately sixty days so Michael and his team knew they had to act quickly once the DOAH's decision was rendered.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual online meeting, October 8-10, 2020. All rights are reserved to the authors and NACRA. © 2020 by Michelle DeMoss, Ram Subramanian, James Beasley, and John Tichenor. Contact person: Michelle DeMoss, Stetson University, DeLand FL. mdemoss@stetson.edu

Paloma Lopez - Fixing a broken food system and developing Future Fit Foods

Gerardo Ungson, Lihua Wang, and Yim-Yu Wong, San Francisco State University

Case Objective and Use

The case can be used in any undergraduate or graduate business courses related to ethics and sustainability. It can also be one of the sessions in the courses such as entrepreneurship, climate change, Food and Agriculture. The students will gain insights from Paloma Lopez on the current status of the global food systems, and various ways to improve the food systems from the perspectives of consumers, entrepreneurs, non-profit organizations, and the governments and the challenges faced by all the parties when implementing these initiatives.

Case Synopsis

In this case, Paloma Lopez, a global expert in Food Branding, Innovation, and Sustainability with 18 years of experience in consumer products icons like Kellogg and Clorox reflected on her career, efforts, and initiatives to address a question that had occupied her for the last few years: How to fix a broken food system.

The case had three main sections. The first section described the formidable challenges facing the current global food system – the system of food production, distribution, and consumption. It focused on the adverse human and environmental impact of the global food system.

The second section of the case provided a recollection of Paloma Lopez's journey to address these challenges in the past two decades.

The third section of the case discussed Paloma Lopez's insights on the promising developments to improve the global food system, including industry collaboration such as FReSH (Food Reform for Sustainability and Health), science-based targets (e.g., Lancet Commission), disruptive startups, and regenerative agriculture.

The case concluded with a strategic plan called Future Fit Foods formulated by Paloma Lopez. An excerpt of the transcript based on the interview with Paloma Lopez was also attached at the end of the case.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Gerardo Ungson, Lihua Wang, and Yim-Yu Wong, and. Contact person: Lihua Wang, Lam Family College of Business, San Francisco State University, San Francisco, CA. lihua@sfsu.edu.

Sean Ansett and workers' rights

Gerardo Ungson, Lihua Wang, and Yim-Yu Wong, San Francisco State University

Case Objective and Use

The case can be used in any undergraduate or graduate business courses related to ethics, sustainability, social auditing, supply chain management, and corporate social responsibility. It can also be used in one of the sessions in the courses such as entrepreneurship, strategic management, supply chain management, human resources management. The students will gain insights from Sean Ansett on the historical development, current issues, and future prospects of global supply chain human rights.

Case Synopsis

Sean Ansett, President of At Stake Advisors Limited, former Director of Corporate Responsibility at Burberry and former Director of Global Partnerships at Gap, Inc., discussed the issue of supply chain human rights. The case first described the history and background of supply chain human rights, using the well-known example of Nike and Wal-Mart scandals in the 1990s. It then turned to Ansett's journey into social auditing, highlighting the existing problems he observed in global supply chain human rights and the role of social auditing in promoting human rights in global supply chain. In the following section of the case, Ansett shared some new developments but also raised some critical issues for the future of supply chain workers' rights, such as ethical branding, code of conduct implementation, non-discrimination, collective bargaining, working hours, and the role of technology in dealing with these issues. Finally, Ansett shared the insights on how COVID-19 may affect apparel companies and social auditing in the future.

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Promoting SDGs through Entrepreneurship in post-insurgency Northeast Nigeria: Case Studies from Impact+

Fardeen Dodo, Lukman Raimi and Edward Rajah, American University of Nigeria

Case Objectives and Use

1. Discover opportunities to create social impact in a venture's business model.
2. Explore options for managing venture's sustainably and helping stakeholders out of poverty.
3. Identify ways to contribute to improving the institutional environment for social impact entrepreneurs.

Case Synopsis

Exactly how start and grow social purpose businesses in very difficult circumstances has remained a profound question. In the Nigeria's northeast, the mammoth challenge of rebuilding communities after Boko Haram in an unfavorable entrepreneurship environment makes this question even more compelling. Using examples of three entrepreneurs at different stages of growth, this case study teaches how entrepreneurs can identify and exploit social impact opportunities with the aid of Impact+, which is an impact measurement praxis built to support entrepreneurial development for promoting Sustainable Development Goals (SDGs) in typical developing country situations. At the end of the study, students will be able to understand how to identify and exploit social impact opportunities through the venture's business model, to primary stakeholders as well as the wider business environment.

Since the Boko Haram insurgency began to subside in 2016, many parts of northeast Nigeria are beginning to deal with its serious aftermaths, principally in the forms of displacement, strained economic progress and immense pressure on available resources. Displaced persons from regions directly affected by terrorism are reluctant to return back home to farm their fields and run their past businesses, sights of street begging among school-aged kids have increased and organized crime is becoming an increasing threat. Many think governments are to blame. We see an opportunity for entrepreneurship-driven positive change. But how can this be achieved, when over 99% of businesses in the state have less than 10 employees, nearly half of the population is poor, and all the key recipes for productive entrepreneurship are simply not available?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Spoontainable: A sustainable entrepreneurship case

Leif Brändle, University of Hohenheim

Case Synopsis

Julia Piechotta and Amelie Vermeer, female student entrepreneurs from the southern part of Germany, create a new venture in 2018 in order to fight environmental pollution. More specifically, they are providing alternatives to single-use plastic cutlery at ice-cream parlors. The founders happen to show perfect timing with new regulations banning this kind of single-use items in the European Union and are riding a wave of sustainability awareness triggered by the European Fridays for Future movement. At the end of 2019, they sell more than 1 million edible spoons. However, at one point in time they face a crucial dilemma in which they are confronted to decide between their sustainable mission and the survival and growth of their young venture.

The development of the case substantially profited from guidance and feedback from the McFerrin Center for Entrepreneurship, Texas A&M University. Specifically, I want to thank Michael D. Howard, Toby Li and Anthony Klotz for their helpful comments. It would also not have been possible without the funding for a PhD scholarship from the INEF-network. The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Pressure on plastic? Responding to consumer pressure and the threat of plastic legislation

Claire Barnado (faculty supervisor), University of Cape Town
Rosalind Dos Santos (student author), University of Cape Town
Geoff Bick (faculty supervisor), University of Cape Town
Nicola Weaver (faculty supervisor), University of Cape Town

Case Objectives and Use

This case was written for students engaged in postgraduate business degrees or diplomas such as Master of Business Administration (MBA), Postgraduate Diploma in Management (PGDip), selected executive education programmes, and specialist Masters programmes. The courses that the teaching case could be used with are sustainability, strategy, values-based business leadership, environmental stewardship in business, and innovation. The teaching objectives of the case are to:

- critically assess the decisions that businesses are required to make regarding sustainability, circular economy, and waste management;
- recommend how a business should adapt to macro environmental changes;
- analyse strategic business choices and how they should be made in the absence of clear, definitive, long-term data and global consensus on the way forward; and
- determine whether the business model should change to incorporate sustainability and circular economy.

Case Synopsis

The case protagonist is Bruce Strong, the CEO of Mpact Limited, which is the largest paper and plastics packaging and recycling business in Southern Africa with operations at over 40 sites across South Africa, Namibia and Mozambique and over 5000 employees. Mpact's 2018 financial year performance saw revenue of R10,6 billion and profit before tax of R429,2 million. The company is a leading producer of plastic and corrugated packaging to major international brands operating in South Africa. As plastics contribute substantially to Mpact's business, there is concern about the pressure on single-use plastic (SUP) with the potential for government legislation as well as consumer pressure to find alternate solutions. If brand owners, retailers and other Mpact customers commit to alternative packaging materials, the business could be lost if the company does not have a market-ready solution that meets their requirements. This rise in consumer pressure and negative sentiment against plastics comes at a time when Mpact has been forced to close one of its plastic recycling plants, as well as terminate kerbside collection of recyclable materials from households, due to economic reasons and a lack of adoption of recycling in South Africa. The South African government has also been promulgating increasing levels of environmental legislation against plastics. The challenge facing Strong is how to balance societal demands for environmental sustainability with the business pressures of meeting financial profitability objectives.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. Names of people and institutions have not been disguised. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 8-10, 2020, Online Only. All rights are reserved to the authors and NACRA. © 2020 University of Cape Town Graduate School of Business, Case Writing Centre. Contact person: Claire Barnardo, UCT, Cape Town, claire.barnardo@gsb.uct.ac.za.

‘Water in the desert?’: Oil India’s CSR impact in Assam

Vidhi Chaudhri, Erasmus University Rotterdam
Asha Kaul, Indian Institute of Management Ahmedabad

Case Objectives and Use

This case can be used in a 75 minute discussion session appropriate for graduate students enrolled in a Management and/or Business communication program as well as industry executives working in the areas of Corporate Communication, Crisis Management, Public Affairs, and/or Sustainability. By the end of the case, participants should be able to:

1. Understand the value (and limits) of corporate social responsibility (CSR) as a development strategy.
2. Identify the unique challenges and opportunities of implementing CSR in a volatile region.
3. Analyze (institutional and organizational) considerations that can influence CSR outcomes.
4. Evaluate how organizations deal with unintended and conflicting expectations of stakeholders.

The case is based on primary research including interviews with senior/management executives at OIL India Ltd as well as interviews with key stakeholders in the field headquarters in Duliajan, Assam. Organizational documents and media reports are also used as supplementary sources.

Case Synopsis

OIL India Ltd.—a leading public sector oil and gas company with exploration, development, production and transportation of crude oil and natural gas in India—faced a critical question about the future of its corporate social responsibility (CSR) strategy. Despite a significant CSR portfolio in the northeastern state of Assam, where 90 per cent of company operations were concentrated, OIL India Ltd. (hereafter OIL) continued to be the target for disgruntled local and student communities who frequently created operational hazards for the company. On the eve of the 60th year of business operations, it was imperative to decide what OIL could do to address and mitigate operational interruptions while fulfilling its CSR mission. Complicating the decision confronting OIL was an interplay of institutional (geo-political and socio-economic) challenges, firm ownership/structure (public-sector), and stakeholder power. OIL’s legacy was inextricably tied to the State of Assam which made exit from the region impossible. Yet, the symbolism associated with OIL in Assam was a double-edged sword. On the one hand, it inspired high levels of trust, loyalty, and support for OIL so much so that the company was seen as government and provider [“Oil is Sarkar”]. This symbolism equally generated bigger and higher expectations, even a culture of dependency. OIL was cognizant of this conundrum but managing it was becoming a challenge. Had OIL’s CSR efforts unintentionally created a ‘water in the desert’ effect?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Vidhi Chaudhri and Asha Kaul. Contact person: Vidhi Chaudhri, Erasmus University Rotterdam, M8-07 Van der Goot, Campus Woudestein, 3000DR Rotterdam; chaudhri@eshcc.eur.nl.

Moltacte: A people-centered social enterprise

Alfred Vernis, ESADE Business School
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Case Objectives and Use

This case is designed to be used in Social Enterprise courses in MBA or MSc level programs to explore the concept of putting people (especially “beneficiaries” of social enterprises) in the center of solutions—and in the center of organizations themselves—and to discuss leadership and management approaches that aim to achieve this goal. Through this case, students will:

- Discuss what it means to put “beneficiaries” at the center of a solution or organization
- Understand and incorporate the main innovations of Teal organizations in a social enterprise: self-management, wholeness, and evolutionary purpose
- Analyze the advantages and disadvantages of applying such innovations in social enterprises aiming to put the people they serve at the center
- Reflect on scaling impact beyond the enterprise itself, e.g. influencing society and corporations
- Reflect individually on the kind of leader each student wants to be

Case Synopsis

This case tells the story of Moltacte, a social enterprise that manages a chain of 5 clothing outlet stores in urban areas outside of Barcelona and has very clear purpose to support the health and well-being of its employees, more than half of whom are people with severe mental illness. Moltacte has developed a management model that puts people (not profits) at the center of the organization and ensures that its people are the driving force of the company, not passive "beneficiaries" or subordinates following orders.

In October 2019, the leadership team is considering the feasibility of transferring its model to one of its corporate partners, Inditex. In this way, the case facilitates discussion of management challenges faced not only by social enterprises but also by large corporations that strive to balance the need for profit with a larger purpose.

Whereas cases about social enterprises are typically written from the perspective of the entrepreneur, the narrator of this case is a character with mental illness, who is a fictional composite of many real Moltacte employees. The authors made this choice because we wanted Moltacte's mentally ill employees to be at the center of the case and the case discussion, just like they are at the center of the organization.

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Conflict minerals rule in the US: Repeal or reform?

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Debapratim Purkayastha, ICFAI Business School Hyderabad

Case Objectives and Use

This case is meant for post-graduate level students as part of their Public Sector Management, Sustainability, Business Ethics, and Business Policy curriculum. This case is designed to enable students to: Understand the issue of conflict minerals in the DRC; understand wicked problems and their implications for public policy and management; study why the US Government implemented Section 1502 of the Dodd-Frank Wall Street Reform and Consumer Protection Act, whether it was successful in tackling the problem of conflict minerals, and its impact on Congolese communities; and understand the difficulties in the application of the Conflict Minerals Rule and explore the possibility of building an effective partnership among various stakeholders to successfully implement the Conflict Minerals Rule.

Case Synopsis

The case focuses on Section 1502 of the Dodd-Frank Wall Street Reform and Consumer Protection Act (Dodd-Frank Act), a US policy response to the problem of conflict minerals in the Democratic Republic of the Congo (DRC), and its proposed repeal. For decades, the exploitation of and trade in conflict minerals in the DRC by armed groups has helped finance conflict in eastern DRC that is characterized by extreme levels of violence and mass killings. The US Congress recognized that aiming to eliminate the nexus between armed groups and illegal mining profits was a key to broader reform efforts in the DRC, and in 2010, it included Section 1502 as part of the Dodd-Frank Act to help disrupt a major source of revenue for these armed groups. The law mandated that all publicly traded companies in the US should disclose annually to the US Securities and Exchange Commission (SEC) if any of the products they sold contained any conflict minerals (tin, tantalum, tungsten, and gold) originating in the DRC or adjoining countries. The case discusses how the provision led to significant improvements in the transparency of corporate supply chains and to a major reduction in the number of conflict mines for the 3T minerals in eastern Congo. However, regardless of good intentions, the Conflict Minerals Provision had some unintended consequences including a de facto embargo on the minerals mined in the region, increasing militia violence against civilians, and a loss of livelihood for millions of Congolese miners. The SEC is modifying the Rule in light of a US District Court order to reconsider certain aspects of the regulation deemed to be unconstitutional. Jay Clayton, chairman of the SEC, was charged with resolving open issues concerning implementation of the Rule. Till that time the rule could not be enforced. With the Conflict Minerals Rule continuing to face an uncertain future, some of the questions were before the policy makers were: Should the law be repealed or reformed? How can the adverse unintended affects that the regulation has caused be minimized? How can the regulation be improved? What kind of policy might work better and what can be done to take everyone along?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Debapratim Purkayastha and Syeda Maseeha Qumer. Contact person: Debapratim Purkayastha, The ICFAI Foundation for Higher Education, Hyderabad, +91 9701017110, debapratimp@gmail.com.

APY Art Centre Collective: Taking art to the city

Theodore Hill and Sheri Lambert, Temple University
Kathryn J Ready, Winona State University

Case Synopsis

In Spring 2019, the elders of the APY Community looked to move its art centre collective gallery from Sydney to Adelaide. In order for this to happen, the arts centre raised seed money and Adelaide city officials offered the APY Arts Centre Collective a small gallery space near the museum in the city. The Adelaide art market was tiny compared to Sydney's. But the elders had been thinking about a gallery in Adelaide for a decade, as there was a large APY community in Adelaide in need of focus and support. With budgets tight, social media and additional digital marketing became increasingly important to showcase and grow revenue for the APY AC Collective.

APY stands for Anangu Pitjantjatjara Yankunytjatjara and is a set aside for the traditional owners from the Pitjantjatjara, Yankunytjatjara and Ngaanyatjarra peoples. The lands were located in the northwestern corner of South Australia, south of Uluru, basically in the middle of the Australian outback. It took a day to travel from Adelaide to the edge of APY lands, and the 7 or so communities themselves were spread over a vast area, about two hours of dirt-road driving apart. In 2019, approximately 2300 people lived on the APY lands.

To launch the galleries, the APY Art Centre formed a collective, controlled by a board of elders, each representing a Centre. They asked Skye O'Meara, a trusted "white fella" to represent the collective and interact with the urban world. Skye had spent 12 years in the APY lands, at first working for the government but then working for various arts centre. Although she had no dealer or gallery experience, Skye had proven to be a good administrator, a passionate advocate, and, critically, a trustworthy employee.

As the team reflects on their successes, takes stock of resources, and assesses its challenges, they are asking themselves did we select the correct path, and what should our plan be going forward?

This case takes the position of Skye O'Meara and her position as the General Manager, APY Art Centre Collective. This case highlights marketing and social entrepreneurial issues facing the APY Art Centre as it considers expansion, and strives to operate as an effective and sustainable catalyst for social innovation and change. This case is designed for both social entrepreneurship and digital marketing courses, and can be taught at the undergraduate, graduate, and executive level.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Creating change through social innovation: The case of girls' school dropout in Uganda.

Isa Nsereko, Makerere University Business School
Alex Bignotti and Mohamed Farhoud, University of Pretoria

Case Objectives and Use

Students of social entrepreneurship, development studies, sustainable livelihoods and asset-based development. It is useful for customised or short programmes or for students with a background in business (e.g. Diploma in Business Administration/MBA/custom programmes) wanting to understand social enterprise and blended theories of social and economic change. This case is written for students in Diploma in Entrepreneurship, undergraduates, elective course in social entrepreneurship for non-entrepreneurship and MSc programme.

Case Synopsis

The case tells the story of Dr Eng. Moses Musaazi, a social entrepreneur and CEO of Technology for Tomorrow (T4T). Troubled with the persistent social problems in his country, Musaazi, through T4T, is striving for social innovations to reduce school dropouts of Ugandan girls. While exploring Moses' journey for solving persistent social problems through social innovations, students will be able to analyse social entrepreneurial characteristics as defined by Dees (2001) and social entrepreneurial opportunities as defined by Zahra, Rawhouser, Bhawe, Neubaum, and Hayton (2008). The case discusses what motivates African social entrepreneurs to start a social venture (Ghalwash, Tolba & Ismail, 2017). Students will explore Personal Initiative Theory establish the social entrepreneurial behaviour aspects that enhance social venture creation. The Social Business Model Canvas model by Burkett (2013), is also introduced to exemplify the different components of social ventures' business model.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

The Bee Community: Work & belong

Erin McGregor, Hannah Grubbs, and Madelyn Karnei (student authors), Texas A&M University
Michael Howard (faculty supervisor), Texas A&M University

Case Use and Objectives

This case can be used in a university seminar class about topics such as entrepreneurship, social entrepreneurship, nonprofit business strategy, or business management. The Bee Community case will allow students to:

- Review business and entrepreneurial strategies when making decisions.
- Recognize how these strategies are impacted by the resource limitations experienced by nonprofit organizations.
- Expose students to the growing sector of social entrepreneurship, and gain perspective on balancing business profits with a social cause.

Case Synopsis

As a former high school special education teacher, Taylor saw first-hand the bleak future that many of her students would face. As adults with significant learning disabilities, this included not being able to get a job after aging out of the public school system. Taylor decided to take action and start her own nonprofit in the Bryan/College Station area to address this problem, and she called it The Bee Community. The Bee Community opened in 2018 and serves as an employer for adults with disabilities, known as the Artisans, creating fulfilling work for each one based on their individual capabilities. This idea has gained traction through its local network, and the organization is receiving lots of applications for Artisans. However, due to space and financial limitations, Taylor will have to make some strategic decisions to best position the organization for growth opportunities all while not compromising the overall mission.

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CSR at Axis Bank: Striving for a sustainable future

Samir K. Barua, Indian Institute of Management, Ahmedabad
Mahendra R. Gujarathi, Bentley University

Case Objectives and Use

The case is relevant for graduate or advanced undergraduate courses on CSR and modules on CSR in courses on corporate governance and corporate strategy. The case provides an opportunity to:

- a. Gain a historical perspective on the arguments for and against CSR, and the rationale to make CSR spending mandatory
- b. Understand the evolution of and the rationale for the development of Sustainable Development Goals (SDGs) by the United Nations
- c. Perform a critical evaluation of the CSR mission for a real-world company
- d. Understand important considerations in the design and implementation of the CSR strategy to create sustainable livelihoods
- e. Examine the alignment of CSR strategy of a firm to the Sustainable Development Goals (SDGs) of the UN, and recommend changes, if any

Case Synopsis

This case documents the CSR journey of Axis Bank, the fifth-largest bank in one of the world's fastest-growing economies, India. While still voluntary in the rest of the world, spending on CSR is mandated by law in India since 2014. The case provides a platform for demonstrating the need for critical thinking and analytical reasoning in the evaluation of CSR strategy and making recommendations to improve its effectiveness.

Guided by three Sustainable Development Goals (SDGs) of the United Nations, Axis Bank had achieved its mission of “generating one million livelihoods in a sustainable manner” in Phase 1 (2011-2017) ahead of schedule. As it embarked on Phase 2 of its CSR journey, the Bank was faced with several key decisions about the CSR strategy to enhance its effectiveness. The case requires students to understand the rationale for SDGs, examine whether the Bank's strategy is aligned to SDGs, and to develop generalizable lessons for the design and implementation of CSR strategy to create sustainable livelihoods. A unique feature of the case is the description of the visits by the case authors to the major CSR projects of the Bank. The record of interactions with the partner NGOs and the project beneficiaries enables students to evaluate whether the stated CSR strategy is manifested in the actions taken by the Bank, evaluate the success of the strategy to date, and suggest areas of improvement.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020. © 2020 by Samir K. Barua and Mahendra R. Gujarathi. Contact person: Mahendra R. Gujarathi, Bentley University, 175 Forest St., Waltham, MA 02452, USA. mgujarathi@bentley.edu

Direct Relief: Rekindling a tradition of public service efficiency in global humanitarianism

Manuel Hensmans, Université Libre de Bruxelles
Maria Ballesteros-Sola, California State University Channel Islands
Dean Axelrod, Direct Relief

Case objectives and Use

The case has been written to be used in graduate Nonprofit Leadership Management and Social Entrepreneurship courses. Given the scope and implications, the case could also be used on an upper-level strategy course. The objectives are: Apply strategic management concepts to analyze the complementary roles of transformational leadership and organizational traditions in a nonprofit context; analyze tensions and challenges that nonprofit's leaders face in creating and sustaining a long-term mission-driven perspective on efficiency, both in times of fundraising crisis and abundance; explore nonprofits' sources of funding and the related starvation cycle; and evaluate historical and current choices, and creatively propose adaptations or radical changes.

Case Synopsis

This real and undisguised case is based on Direct Relief (DR), a +70-year-old humanitarian \$1.2B nonprofit organization headquartered in California (USA). From its headquarters in Santa Barbara, Direct Relief responds to emergencies and delivers medical support for vulnerable people affected by poverty, natural disasters, and civil unrest in all 50 US states, six US territories including Puerto Rico and US Virgin Islands, and in more than 90 countries. The case presents Thomas Tighe, DR's President and CEO, reflecting in late 2018 on the transformation and growth that the organization had experienced since he started his tenure in 2000. Specifically, he is struggling to find the most effective way to allocate an unrestricted recent cash donation. Should DR spend that money in traditional fundraising, reducing its efficiency rate, or should DR take a long-term approach and use it to build long term capabilities? Additionally, the case outlines the history and evolution of Direct Relief over its more than 70 years of existence, the CEO's background and motivations, as well as a detailed description of the organization's revenue portfolio. Students will have an opportunity to learn about a unique nonprofit named among "the world's most innovative companies in non-for-profit" by Fast Company; Direct Relief was also included in the Charity Navigator's list of the "10 Best Charities Everyone's Heard of". Additionally, in January 2009, Direct Relief was designated as a Verified-Accredited Distributor (VAWD) by The National Association of Boards of Pharmacy (NABP), which placed it as the first nonprofit to receive this designation to deliver prescription medicines to all 50 US states. Throughout Tighe's tenure, Direct Relief has been lauded for its fundraising efficiency. The unique distinction to Direct Relief's efficiency is its tradition of adopting new technologies and modern business practices for humanitarian purposes.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 8-10, Online only. All rights are reserved to the authors and NACRA. ©2020 by Manuel Hensmans, Maria Ballesteros-Sola and Dean Axelrod. Contact persons: Manuel Hensmans, Université Libre de Bruxelles, Belgium. mhensmans@ulb.ac.be, and Maria Ballesteros-Sola, California State University Channel Islands. Maria.Ballesteros-Sola@csuci.edu

Go Baby Go: Scaling a social movement around mobility

Maria Ballesteros-Sola, California State University Channel Islands
Stephanie Raible, University of Delaware

Case Objectives and Use

The case is written to be used in undergraduate courses in social enterprises, social entrepreneurship, and nonprofit management. The discussion about growth and scale is usually placed later in these courses. We recommend using the case after the students have been introduced to the concept of social entrepreneurship and different organizational forms. GBG has no legal structure, so students need to have been exposed to those to fully appreciate what a unique organizational arrangement Galloway has created. The case allows students to engage in some critical discussions in the social impact arena. Specifically, students who complete the required readings, assigned pre-work, and participate in the class discussion should be able to do the following:

1. Apply existing definitions of social entrepreneurship to a real-life context.
2. Evaluate the characteristics of a social movement.
3. Differentiate growth strategies used by social entrepreneurs to scale their impact.
4. Generate a path forward/scale plan for a social entrepreneur in the context of scarce resources.

Case Synopsis

This case portrays Go Baby Go's founder Cole Galloway, Ph.D. in 2018, debating how to scale GBG's impact given the numerous resources constraints he was facing. Go Baby Go was a project started by Galloway, a full professor, under the University of Delaware's umbrella in 2010. Galloway, a top physical therapy scholar, began to modify ride-on toy cars for his research on infants and mobility and serendipitously discovered that he was fulfilling an unmet need that could positively impact the development of hundreds of thousands of kids and their families. What started with a simple idea - adapting ride-on toy cars turned into an international advocacy movement for infants and children with significant mobility issues. After eight years of unprecedented success and organic growth with limited resources, Galloway was trying to figure out how to scale GBG's impact. The case describes Galloway's background and his journey as an "accidental" social entrepreneur and his unique approach to scaling the GBG social movement. Through Galloway's experience, students will be able to discern social entrepreneurs' characteristics, analyze existing social enterprise growth strategies, and social movements.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. © 2020 by Maria Ballesteros-Sola, Stephanie Raible Contact person: Maria Ballesteros-Sola, California State University, Channel Islands, One University Drive, Camarillo, CA 93012, +1.805. 418.0126, maria.ballesteros-sola@csuci.edu

STRATEGY AND POLICY CASES

Track Chair: Karin Schnarr, Wilfrid Laurier University

Track Co-Chair: Brent Beal, University of Texas at Tyler

Cases	Authors
Shareholder activism at AOL	Matthew Shea
Byju's: Shaping the future education with technology	Shiwangi Singh Shatrujeet Rathore Sanjay Dhir
The Johnson & Johnson baby powder debate	Vijaya Narapareddy
Ichalkaranaji: India's Manchester needs to weave magic	Malay Krishna Vasant Sivaraman
Tapestry, Inc. – An American holding company in the luxury retail industry	Rebecca Treadway
Mondragon/Eroski: Global power catering to local needs	Olivier Roche Thomas Calo Frank Shipper
Foresters Financial – Moving from life insurance to life enablement	Michael Ross Stephany Desroches Sofy Carayannopoulos
Avenue Supermarkets: An ace in retail space	Ankur Mittal Tarun Dhingra Vikas Kumar
MercadoLibre, Inc. – Fresh products: In or out?	Javier Silva Enrique Chamas Eduardo Catalan Villegas
Can Philip Morris sustain the big shift in global smoking landscape	K. Kumar
Gates Corporation: Scanning for competitive threats	Paul Seaborn
Healthy Minds Co-operative	Daphne Rixon Leslie Brown Heidi Weigand
Patanjali Ayurved Limited	Sumesh Raizada

Shareholder activism at AOL

Matthew I. Shea, West Chester University of Pennsylvania

Case Objectives and Use

This decision case is most appropriate for undergraduate and graduate courses in strategy, management, and finance. The case was designed to teach principles of governance and is most effective when students have a working understanding of business strategy, corporate strategy, and financial markets.

The case uses events at AOL that led to a proxy fight with Starboard Value, LP (Starboard). Information about individuals and organizations was assembled from publicly available SEC filings, news articles, magazines, books, websites, online databases, legal proceedings, and multi-media recordings.

After reading and analyzing this case, students should be able to:

1. Evaluate competitive advantages and corporate advantages.
2. Appraise the fit of organizational structure to strategy.
3. Debate the pros and cons of CEO duality.
4. Explain the importance of institutional shareholders and shareholder activism.
5. Produce a strategic plan presentation for shareholders.

Case Synopsis

AOL hired Tim Armstrong to lead its 2009 spin-off from Time Warner. The spin-off allowed AOL to independently manage its strategic transition from an internet service provider to a digital media company. On December 21, 2011, Starboard, a private investment fund that owned 4.5% of AOL, sent a letter to AOL that expressed displeasure with AOL's stock performance and reviewed three primary causes. First, AOL's display advertising business eroded almost all value created by AOL's other advertising activities. Second, AOL overpaid for its acquisitions and inefficiently managed those acquisitions. Third, governance deficiencies enabled AOL's strategic and managerial mistakes. Starboard requested meetings with AOL's senior leadership to discuss concerns and guide future decisions. The meetings were unsatisfying and led to a proxy battle for three seats on AOL's eight-member, board of directors. Tim Armstrong must present counter arguments to Starboard's accusations and reinforce the logic of his strategic vision at AOL's 2012 Annual Shareholders Meeting.

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously reviewed for presentation at the NACRA 2020 Conference, October 8-10, 2020. ©2020 by Matthew I. Shea. Contact person: Matthew I. Shea; West Chester University of Pennsylvania, BPMC 425, 50 Sharpless Street, West Chester, PA 19383; 610-436-2867; mshea@wcupa.edu

Byju's: Shaping the future education with technology

Shiwangi Singh, Indian Institute of Technology Delhi
Shatrujeet Singh Rathore, Indian Institute of Technology Delhi
Sanjay Dhir, Indian Institute of Technology Delhi

Case Objective and Use

The case can be employed in an MBA program for courses in strategic management and general management area. This case can particularly be applied in a strategy formulation module after the fundamental concepts, internal environment analysis, and external environment analysis, before sessions on strategic implementation. The focus of this case study includes the external and internal analyses of a firm. The objective of this case study are as follows:

- Perform and comprehend a general environment analysis and industry and competitive analysis.
- Significantly assess the firm's strategic positioning and scope in a competitive environment.
- Influence core proficiency for sustainable competitive advantage.
- Understand how to generate and capture higher value vis-à-vis other players in the business.

Case Synopsis

Byju Raveendran established Think and Learn Pvt. Ltd. in 2011 with the aim of helping children, students, and professionals fall in love with the learning process through their entire education lifecycle from preschool to professional training. This strategy over 11 years, enabled BYJU'S to become the largest player in the Ed-Tech sector in India. BYJU'S achieved growth mostly via acquisitions and alliances. However, with almost a decade gone by, the plan of action was becoming a formidable threat, owing to the changing technology and economic uncertainty. Raveendran pondered over how to maintain his organization's leadership position by expanding into global and regional markets.

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The Johnson & Johnson baby powder debate

Vijaya Narapareddy, University of Denver
Erica Berte, Metropolitan State University
Doug Allen, University of Denver

Case Objectives and Use

This case is useful in the following undergraduate, graduate, and executive courses in:

- Corporate Strategy; and
- Global Management

It deals with the following issues:

- Corporate Governance;
- Trust; and
- Corporate/ Business Sustainability

Case Synopsis

This case deals with the impact of Johnson & Johnson's (J&J) baby talcum powder scandal on the sustainability of Johnson & Johnson (J&J) in global markets. The \$4.69 billion verdict assessed by a US Judge in December 19, 2018 sent ripples through the stock market causing J&J to lose 10% of its market cap in a single day. However, the CEO continued to deny any wrongdoing and vowed to fight back. A Reuters report published on December 14, 2018 revealed that J&J officials knew of the presence of asbestos for decades but tried to keep the documents a secret. This highly engaging case draws students in a rich discussion and debate of the crisis brewing in J&J from the triple lenses of corporate governance, trust, and sustainability.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2020 Conference, October 4-6, 2018. © 2020 by Narapareddy, Berte & Allen. Contact person: Vijaya Narapareddy, University of Denver, Denver, CO 80210 (e-mail: vnarapar@du.edu).

Ichalkaranji: India's Manchester needs to weave magic

Vasant Sivaraman, S. P. Jain Institute of Management & Research
Malay Krishna, S. P. Jain Institute of Management & Research

Case Objectives and Use

This case can be used for a graduate course in business that deals with competitiveness of regions, strategy for economic development, or microeconomics of clusters – a set of related and complementary firms in a sub-national region or state. In a post-pandemic world, we expect this case might be especially relevant as the importance of resilience of supply chains and near-sourcing grows. The case offers opportunities for the learner to analyze the situation from three lenses: Cluster (broadly signifying location), Industry and Firm. Specific objectives are:

- Learn how to identify and analyze the drivers of competitiveness of a cluster.
- Assess the strength of clusters using Porter's Diamond framework.
- Map the linkages between players of a cluster: across firms, industries, and public organizations.
- Benchmark and compare clusters in order to identify opportunities for upgrading weak links.

Case Synopsis

This case describes the challenge facing Nikunj Bagdia, the owner and chief executive of Ken Enterprises Private Limited (Ken), a textile manufacturing unit in October of 2019. He is wondering how to ensure the long-term viability of not only his company, but several other textile manufacturers from the town of Ichalkaranji (IK). IK boasts the largest number of cutting edge air-jet looms in the country. Garment manufacturers from across the country as well as internationally, give orders for customized weaving on a job-basis to companies located in IK. And yet, Nikunj knows that IK lags the textile and apparel manufacturing cluster in the state of Tamil Nadu, and even further behind the apparel manufacturing cluster in the neighboring country of Bangladesh. IK's home state of Maharashtra (MH) is a national leader in several clusters such as financial services, entertainment, hospitality, and automotive. Yet, despite having a large employment base in textile manufacturing, MH lags Tiruppur's home state of Tamil Nadu. Though IK enjoys a technological advantage, Nikunj believes there are deep structural flaws in the cluster. A comparative analysis of the IK cluster and the related, but stronger cluster of Tiruppur could help identify the levers for an upgrade. As the case closes, Nikunj realizes that even with a clear call to action, it will be an uphill task to get the hundreds of textile manufacturing companies in IK to make a concerted effort to change. However, if the underlying issues with the cluster are not addressed, IK's competitiveness could decline. At a larger level, if the structural flaws affect not only the state of MH, but also India as a whole, then the global competitiveness of India in textile manufacturing could be under threat.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Malay Krishna and Vasant Sivaraman. Contact person: Vasant Sivaraman, S. P. Jain Institute of Management & Research, Bhavan's College Campus, Andheri (W), Mumbai – 400058, INDIA, +91-9820096444, vasant@spjmr.org.

Tapestry, Inc. – An American holding company in the luxury retail industry

Jordan F. Berry (student author) Maryville College
Rebecca Broady Treadway (faculty author) Maryville College

Case Objectives and Use

This case may best be taught in an undergraduate Strategic Management class to provide insight on industry analysis. A close examination of the luxury retail industry reveals its complexity due to the array of conflicting factors that impact forces in the industry. The case reviews differentiation strategy but more significantly strategic structural change and the formation of a holding company. Introspection is given on holding company structure in the fashion industry – the provisions and constraints. The case may be used in an MBA strategy class to discuss strategy and organizational structure. Optimizing structure minimizes stagnation. The relevance of leadership and capability development for organization vitality becomes apparent.

Case Synopsis

Tapestry, Inc. provided luxury fashion and lifestyle selections in the middle tier of the luxury retail industry. The holding company was comprised of three brands - Coach, Stuart Weitzman, and Kate Spade. Tapestry's creation was prompted by financial hardship as well as the rising success of European luxury fashion holding companies like LVMH and Kering. The holding structure offered protection and opportunity in the market. The chosen name for the holding company, Tapestry, evoked the image of different threads beautifully woven together. Yet, on March 28, 2020, Tapestry reported its first operating loss. The highly competitive luxury retail industry was inundated with changing customer demographics, an expanding China market, and indelible competition. Beyond industry dynamics, the Coronavirus had arrived; knocking supply and demand sideways. Jide Zeitlin, Tapestry CEO, was deeply concerned. What initiatives within the holding structure would create synergy and agility to tighten operations and allow for profitability?

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Mondragon/Eroski: Global power catering to local needs

Olivier P. Roche, Salisbury University
Thomas Calo, Salisbury University
Frank Shipper, Salisbury University

Case Objectives and Use

This case would suit well the strategy capstone course usually offered during the last year of a business bachelor degree [Senior level]. It is also recommended for strategy, human resources and international business courses at the MBA and Executive levels. The first learning objective of this case is to educate students/executives on the existence of a highly successful business model that is completely different from the corporate model. [e.g. Coop is a business model that is not limited to basic and rudimentary sectors (e.g., farming, credit unions), and shared leadership/decision making process works, even in highly competitive industries]. The second learning objective is the evolution/adaptation of a successful business model to the globalization process. The third learning objective is related to the human resource practices. In an economy that is mainly focused on providing services, everyone seems to agree that human capital is the main asset of an organization. However, when it comes to remuneration, the human capital of a corporation appears to be only valued at the CEO and senior management team level. In contrast, at Mondragón, human capital includes everyone.

Case Synopsis

Because of its size and the large scope of its activities, Mondragon offers a credible alternative to a traditional capitalism model that is increasingly showing its limits. Broad employee ownership of the enterprise underlies Mondragon's culture. It is the centerpiece of a values-based business model captured in the company's logo "Humanity at Work." However, over the last 25 years, Mondragon has faced a relentless and rapid globalization process, and the "Corporación" had to adjust its structures and ways of doing business in substantial ways. A largely consensus oriented decision-making process that worked well in the Basque country with people sharing the same language and culture had to be adjusted when the organization expanded internationally to tap new markets or to follow some of its key customers and make its cost structure at least roughly similar to that of its multinational competitors. The case focuses on Eroski, which is one of approximately 260 co-ops in the Mondragon Corporation in Spain. Beginning in the 2000's, this small to medium size enterprise (SME) had to contend with large multinationals invading its home market. Faced with multiple disadvantages both as a co-op and in size, it had to invent itself without abandoning the social principles upon which it had been founded. By reinventing itself as a boundaryless organization, it partnered with enterprises that shared those principles and some that were willing to adopt them. Some of the partners maintained their own identity and others were incorporated into Eroski. The successful results suggest that employees, customers and even rivals when acting collaboratively can build sustainable competitive advantages beneficial to all parties.

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Foresters Financial - moving from life-insurance to life-enablement

Sofy Carayannopoulos (faculty supervisor) - Wilfrid Laurier University
Stephany Desroches (student author) – Wilfrid Laurier University
Mike Ross (student author) – Wilfrid Laurier University

Case Objectives and Use

This case is appropriate for a senior undergraduate or M.B.A. business strategy course. Because the subject organization in this case is a fraternal organization, this case should ideally be used later in the course when alternative organizations, such as co-operatives and not-for-profit businesses, are discussed. The case was originally used in a case competition and was treated as an open-ended case where students had a great deal of latitude to identify and defend their solutions.

The objectives are:

- Examining the unique challenges of business that exist for a social or societal purpose, rather than profits for shareholders.
- Exploring ways to create customer engagement in products and services which traditionally have few touchpoints with customers.
- Recognizing the challenges of creating disruptive innovation versus sustaining improvements.

Case Synopsis

In 2019, Foresters Financial was noticing the lack of modernization in the insurance industry. Notably, providers would meet customers at one point in their lives and make a point-in-time decision on pricing and product, with infrequent reassessment. As a fraternal organization, Foresters was a non-profit organization that cared about supporting causes that enriched the lives of their members and their communities. Wanting to disrupt the industry and add more value to its membership, Rish Singh and Khaled Qinne were searching for a program they could implement to change the life insurance process from a one-time transaction to an on-going relationship with policyholders that encouraged them to live healthier, more fulfilling lives. Keeping their typical membership base's low income, older age, and inexperience with technology in mind, they needed to craft this program to both allow better engagement between the organization and its members and create innovative products which would modernize their business.

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Avenue Supermarts: An ace in retail space.

Ankur Mittal, Tarun Dhingra, and Vikas Kumar, School of Business, UPES, Dehradun

Case Objectives and Use

This case can be used in a MBA class (core Finance & Strategic Management paper and for advance elective courses like strategic management in emerging market), in short term management development programs-MDP, a faculty seminar on Business model or on teaching by case pedagogy. The objectives are:

- Instructor can use this for covering concept of business model, Valuation and Competitive Advantage,
- To explore relationship between superior profitability with business model and identify the source of competitive advantage.
- Understand essential components of a business model - value proposition, customer interface, value creation and value capture.
- Learn how company apply these concepts in practical business world to create a robust business model.

Case Synopsis

This real case is based on the journey of a new entrant (Avenue Supermarts) in rapidly growing organised retail business of India and establishes itself. Its ability to make unique business model helps it to garner significant market share and phenomenal growth in revenues and profit. Its carefully articulated business model makes a mark through value proposition, customer interface, value creation and value capture. The case tracks the competitive advantages and successful value drivers, which worked for Avenue Supermarts for achieving superior firm performance since its listing on the Indian stock exchange. It narrates further different growth options, competitors, industry evolution, e-commerce and aligning company's growth to its value to keep its superior performance spree. Central dilemma is how to maintain its advantage while scaling and expansion? The case ends with a peek into the valuation & future challenges of the company.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

MercadoLibre, Inc. - Fresh Products: In or out?

Javier J. O. Silva - IAE Business School – Austral University

Enrique Chamas - IAE Business School – Austral University

Eduardo Catalán Villegas - IAE Business School – Austral University

Case Objectives and Use

This case can prove particularly useful to address the topic of business model innovation in the digital age. By analyzing, discussing, and making choices about the case, students will learn to: Spot opportunities to improve a company's competitive positioning; realize the importance of coherence among business model components as well as the need for inner and outer consistency in order to introduce innovations; check the fit between a specific value proposition and its target market; anticipate the challenges brought by introducing changes into the business model of an online platform, factoring in the differences between emerging and developed countries; and manage the execution of changes, expansions, or innovations to an existing business model. This case has been designed for MBA and executive education programs, specifically addressing the needs of courses on Business Model Innovation that deal with the strategic/business analysis of value propositions and the challenges posed by their execution. It may also be used in courses on strategy, advanced marketing strategy or digital business that include discussions on the competitive dynamics of online business.

Case Synopsis

In 2020, the top management team at MercadoLibre, Inc. (MELI), Latin America's largest and the world's seventh e-commerce ecosystem, needed to choose whether to expand its CPG (Consumer Packaged Goods) business by adding fresh product categories. The company explored this option as a means to address the increasing competitive pressure coming from Amazon's arrival in Latin America (Latam), other e-commerce players' operations, and offline retailers' move to build their own online platforms. Incorporating fresh product categories would force MELI to delve deeper into a business model that included offline operations, high complexity, large investments, and low or no margins. Fresh products accounted for online retailers' greatest challenge, and many powerful players had failed in their attempts to incorporate them. The demand to deliver fresh food efficiently and effectively to individual customers, compounded by last-mile management complexity and very small time windows, put business models to the test. Against this backdrop, MELI's Strategy Senior Manager had to recommend whether the company should or not venture into fresh products. If MELI decided to move forward with these categories, he would have to propose how to determine and execute the innovations required to adjust the company's business model accordingly. This case provides an interesting opportunity to discuss different business models and the difficulties they pose for innovations, enabling students to anticipate the challenges brought by significant changes in a platform ecosystem.

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Can Philip Morris sustain the big shift in global smoking landscape?

K. B. S. Kumar, IBS Hyderabad

Case Synopsis

André Calantzopoulos, CEO of the world's largest publicly traded tobacco company Philip Morris International (PMI) was all set to launch the company's breakthrough Heated Tobacco Product iQOS (I quit ordinary smoking), in the US market. PMI had introduced iQOS as an alternative to traditional smoking products. HTPs were PMI's future business products, and the company worked on these products for several years before launching iQOS in Japan in 2014. In the next five years the product was sold in 38 countries around the world. But the US market was a different ball game altogether, as federal agency related to health and human services Food and Drug Administration (FDA) had to approve the product before the launch. The approval came with criticism that only selective toxins were subjected to lab testing. For André Calantzopoulos, success of these products was highly important. For several years, PMI had been advocating people to quit smoking, and discouraged the use of traditional cigarettes. But in the process PMI cannibalized its own traditional combustible cigarettes. But the decline in demand for traditional cigarettes was not set off by the rise in the alternatives, which had hit the company's profitability. André Calantzopoulos had a huge challenge ahead of him. He not only has to come out with a plan to introduce a new technology into the market, but has to also address the growing concerns about the harmful side effects of the ingredients. Competitors were not far behind many of them have their own HTPs in the making, and were just waiting for the right time to enter the US market. At this juncture, André Calantzopoulos needed to steer the company in the right direction, while the future of its future product was itself ambiguous.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Gates Corporation: Scanning for competitive threats

Paul Seaborn, University of Virginia
Lena Chhay (student author), University of Denver

Case Objectives and Use

The case can be used in an undergraduate or graduate strategy class or a class focused on innovation. It can also be used in a management consulting course if additional emphasis is placed on the process of developing a strategic recommendation for a client. The objectives of the case are:

- Learn how to conduct an industry analysis to determine the competitive threats within a sector.
- Learn how to analyze an incumbent company's strengths and weaknesses in a SWOT model to narrow down concrete solutions for the company.
- Understand the concept of disruptive innovation and describe the challenges of anticipating changing industry trends and disruptive innovators.
- Propose strategic recommendations for a company based on the issues and challenges identified through environment scanning and strategy formulation.

Case Synopsis

This case study describes the challenges an established industry leader faces in maintaining its competitive position and the role that environmental scanning can play in the strategic management and innovation processes. It is written from the perspective of Carol Weber, the Director of New Technology and Innovation at Gates Corporation. Gates is a multi-billion-dollar company that is an industry leader in the manufacturing of belts, hoses and other industrial products for the automotive industry and a variety of other industries. Gates has been in existence for over one-hundred years but after many decades of family ownership it is now owned by a private equity firm and faces an uncertain future. ContiTech—the corporation's biggest competitor—has acquired numerous manufacturing sites and technologies and released new products in the last few years. Gates also fears disruptive innovation from an unexpected competitor, from having its products become irrelevant due to changes in related industries, or from missing new market opportunities. The wide range of potential threats makes its environmental scanning and competitive analysis particularly challenging. Weber and Gates must determine what threats are most pressing and what strategies can the company employ to mitigate these threats.

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Healthy Minds Co-operative

Daphne Rixon, Saint Mary's University
Leslie Brown, Mount Saint Vincent University
Heidi Weigand, Dalhousie University

Case Objectives and Use

Students will:

1. Gain an understanding of the cooperative business model and of the concept of co-operative identity.
2. Gain an understanding of the importance of providing resources to those facing mental health challenges.
3. Learn how to develop a strategic plan to address financial issues which are common in many small NFP organizations.
4. Learn how an organization can adapt its core competencies to meet changing demands for its services.

Case Synopsis

Lynn Yetman, Executive Director of Healthy Minds Co-operative (HMC) was concerned about the future role for HMC. When it started operations in 2005, HMC's initial focus was to help people navigate the complex mental health system to identify supports and resources. However, with technology and an extensive array of information available on the internet, people are looking for their own supports and resources and consequently do not need as much help from us in navigating the system. However, Lynn is very much aware that people need more than online information. She believes that the peer support provided by HMC is a unique value for people with mental illness, but they need to find a strategic solution to take advantage of this uniqueness. To expand the role of HMC and increase awareness, they need to find additional sources of funding. They are barely able to cover their expenses and when a current grant is utilized, they will have difficulty paying the rent for the office space.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, Online, October 8-10, 2020.

Patanjali Ayurved Limited

Sumesh Raizada, JIMS, Delhi

Case Objective and Use

The case has been prepared for teaching or discussion in the Strategic Management course, for the post graduate management students. The students are expected to;

- Recognize the environmental factors faced by the company
- Review the existing strategies of the firm and suggest suitable changes, if required
- Explore the approaches that firm might take in order to achieve its goals in next five years

Case Synopsis

The present case is of Patanjali Ayurved Limited, an FMCG and herbal product Indian firm that challenged the domination of several MNC giants in the domestic market. Though established in 2006, the firm grew phenomenally from 2011 to 2017, almost doubling its sales each year. During this period it created a heavy disruption, creating an entirely new market for some of its Ayurvedic and herbal products. Market share of companies such as Colgate Palmolive, P&G, HUL, ITC, Dabur and Nestle got affected as consumer preferences shifted towards herbal products. However, trouble for Patanjali began in Nov.2016 when demonetization was announced in India in which higher denomination of currency notes were immediately withdrawn. Its customers and distributors could not immediately shift to digital modes of payments, adversely impacting the sales. Later in July, 2017 when GST, a centralized taxation system was implemented across India, the firm's supply chain partners were badly affected as they were not having digital systems in place. Consequently, its turnover stagnated in the following years, creating speculations over the firm's ability to handle its growth. There were other factors also that contributed to this situation, such as its heavy expansion plans, entry into large number of categories and lack of transparency. Besides, the competitors also bounced back with their own natural and herbal variants. Colgate introduced Vedshakti, a toothpaste with herbal ingredients while HUL revived its Ayush brand of Ayurvedic personal care products. Case explores the factors that caused disruption in FMCG and Herbal product market by Patanjali Ayurved. It also deliberates on the issues that led to firm's falling growth and the measures that were taken to regain its customers. At the end, it stimulates readers to explore the challenges that founders might face in order to make Patanjali the top FMCG firm in India and recommend suitable strategies.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2020 Conference, San Antonio, TX, October 8-10, 2020. © 2020 by Sumesh Raizada, Jagan Institute of Management Studies, Sector-5, Rohini, Delhi, India, 91-9650758671, sumesh.raizada@jimsindia.org